

QUICK REFERENCE GUIDE

Updated July 11, 2022

Add an Inline Prompt to a Report in the EPM Data Warehouse

After you run and save an existing report or analysis, you can return to it and update it in the EPM Data Warehouse. One option is to add an inline prompt in the Prompts tab.

A prompt allows you to customize which data is returned in the analysis or report. Inline prompts allow you to filter specific report fields without editing the analysis. Inline prompts occur at the analysis/report level. They are embedded in the individual report and not stored in the Catalog. They are not reusable in another report.

Before you create any prompts, it is important to understand what you want the prompt to do, what the data set is, and how you want it to be displayed.

IMPORTANT! You can only add fields, filters, and prompts using the current Subject Area. For example, you can't add an FMS prompt to a report created from a SCM Subject Area.

This guide demonstrates how to create and use an inline prompt from the Prompts tab.

The Appendix summarizes Oracle's guidelines for choosing an operator and Default selection fields in the New Prompt/Update Prompt window.

Steps to complete:

- Step 1: Navigate to the EPM Data Warehouse
- Step 2: Check the report to make sure the desired data set is prompted
- Step 3: Create a new inline prompt, update it as needed, and save it
- Step 4: Use the inline prompt on the report

Steps to create and use an inline prompt from the *Catalog*

This guide uses an existing report that allows an agency to view purchase orders by document type. The inline prompt will allow an agency to run the report by document type on the *Prompts* tab.

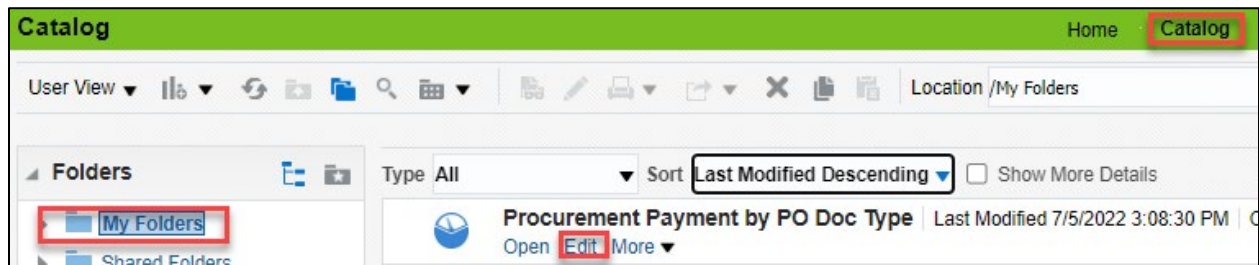
Step 1: Navigate to the EPM Data Warehouse

1. Follow this navigation to the EPM Data Warehouse.

Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Data Warehouse

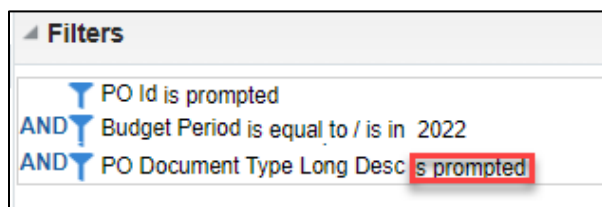
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2. Use the global menu to search for or navigate to the desired report. Select *Catalog*, *Favorites*, or *Dashboards* to search for your desired report. For this guide, we'll use the *Catalog* to find the report.
3. Find the report and select the *Edit* link below it.

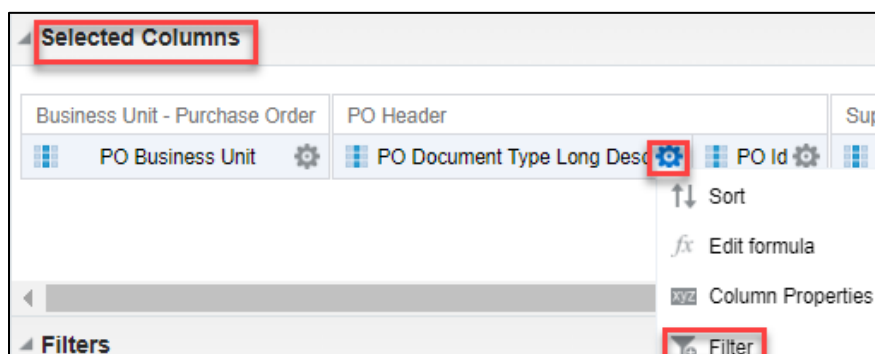


Step 2: Check the report to make sure the desired data set is prompted

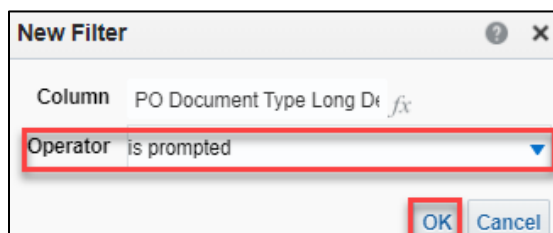
1. Open the *Criteria* tab and check the *Filters* section. The data set that you want to use in a prompt must be filtered “as prompted.”



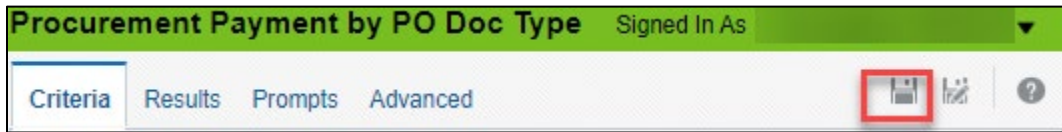
2. If the data set is not prompted, add it.
 - a. Go to the *Selected Columns* section and open the **Menu** icon. It looks like a gear. Select “Filter.”



- b. The EPM Data Warehouse displays the *New Filter* window. Open the *Operator* section and choose “is prompted.” Then select **OK**.



- c. The EPM Data Warehouse updates the *Filters* section with the prompted label.
- d. Save updates to this report using the **Save** icon at the top right of the page.



Step 3: Create a new inline prompt, update it as needed, and save it

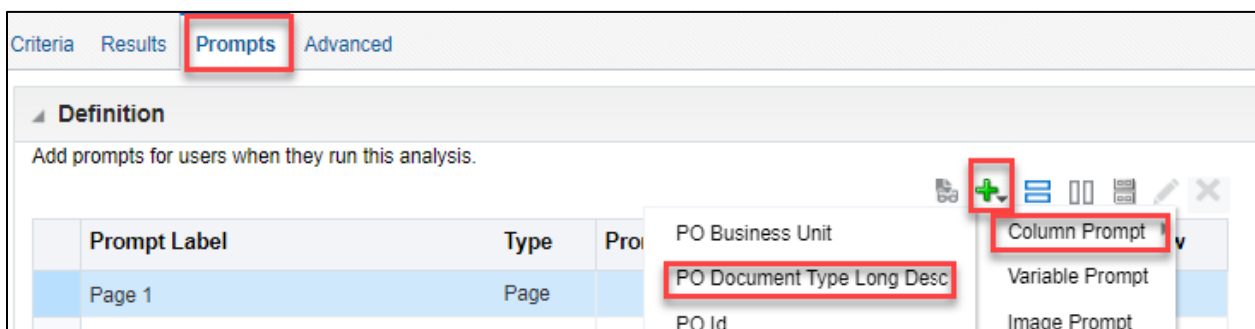
1. Open the *Prompts* tab in your existing report. The *Prompts* tab consists of two panes: *Definition* and *Display*.
 - **Definition pane:** This pane lists your inline prompts for the report. You can also preview your report. You can add, edit, and delete inline prompts. You can also change the layout of the *Report Prompt* page.
 - **Display pane:** This pane shows you how the *Report Prompt* page will look as you add inline prompts.



2. To add a new inline prompt, open the *Definition* pane.
 - a. Select the **New Prompt** icon, which is a green plus sign. The EPM Data Warehouse opens prompt options.

NOTE. Column is the most used inline prompt. A *Column Prompt* enables you to build very specific value prompts to either stand alone on the dashboard or the report. It also allows you to expand or refine existing dashboard and report filters.

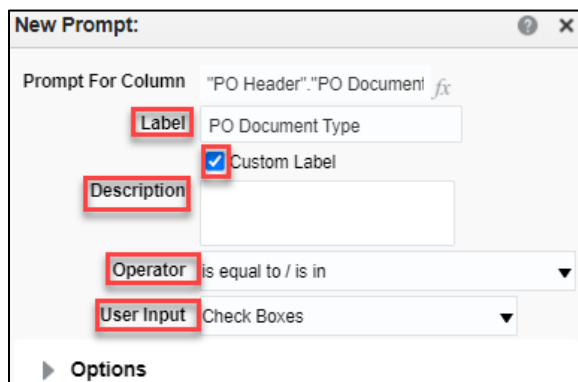
- b. Select the *Column Prompt*.
- c. Then choose one of the data fields on the far-left menu. For this example, we'll select "PO Document Type."



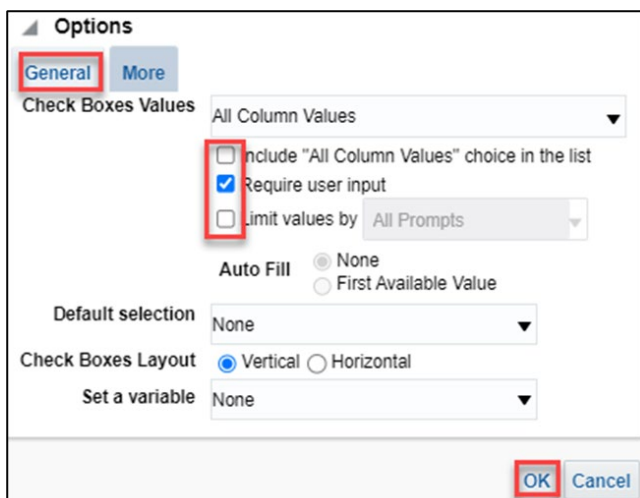
- d. The EPM Data Warehouse opens the *New Prompt* window. Update the fields in this window as needed.

IMPORTANT! There may be some trial and error to get an inline prompt to work as desired. View the Appendices in this guide for the *New Prompt* window fields such as *Operator* and *User Input*.

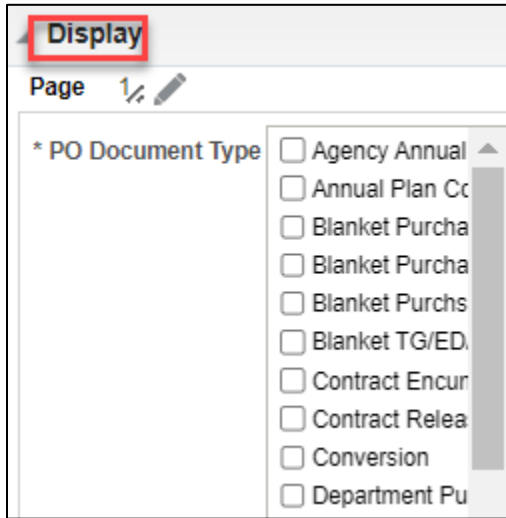
- i. Check the *Custom Label* box if you want to update the *Label* field.
- i. Update the *Label* field as needed.
- ii. Add text in the *Description* field as needed.
- iii. Update the *Operator* field. Select an option. For this example, update it to “is equal to/is in.”
- iv. Update the *User Input* field to the option that best fits. For this example, we’ll select “Check Boxes.”



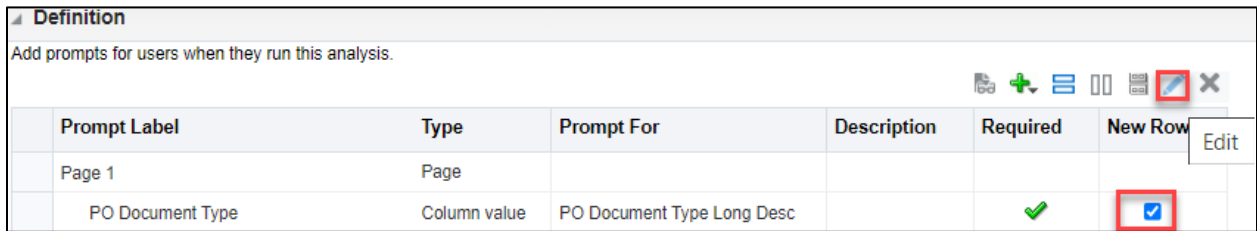
- b. Update the *Options* section of the *New Prompt* window to add values for the new inline prompt. The options you see depend upon the *User Input* selected value.
 - i. Open the *Default selection* field. This field allows you to specify the desired value(s).
 - ii. For this example, we’ll check the *Check Boxes Values* box for “Require user input.”
 - iii. After completing the required fields that you need for the inline prompt, select **OK**.



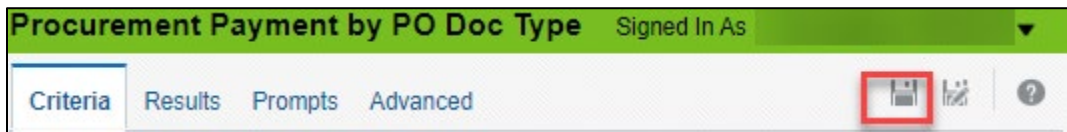
c. The new prompt appears on the *Display* section of the *Prompts* page.



3. If you wish to edit the prompt, check the **New Row** box. Then, select the **Edit** icon on the top left of the *Prompt Label* table. Update the fields of the *Edit Prompt* window as needed. Select **OK**.

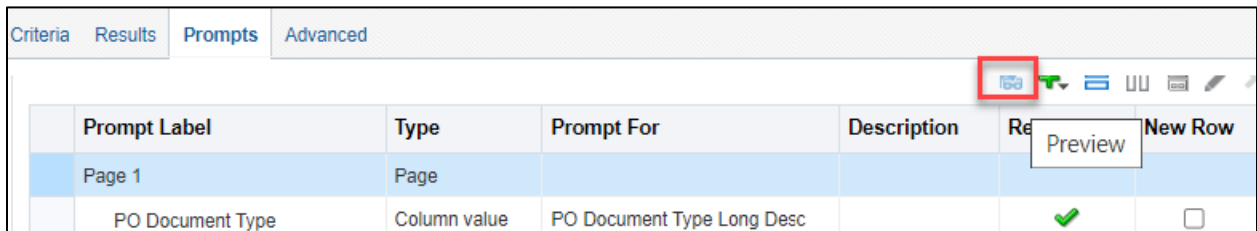


4. Save the report.



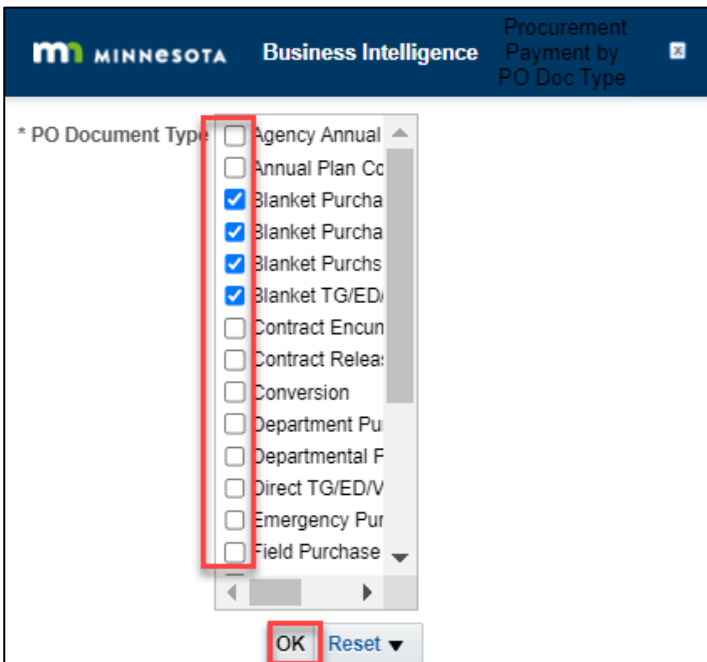
Step 5: Use the inline prompt on the report

1. Run the saved report using the **Preview** icon. It looks like glasses. It is located on the far-left menu above the report.



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- A new window appears with the inline prompt. Run the report using the inline prompt. Update the variable and select **OK**.



- The EPM Data Warehouse will run the report using the selected prompt values in this window. When you are done with it, exit out of the report selecting the **Exit** icon at the top right of the window. It is an "X."

Budget Period Year	PO Header	Supplier Contract	Supplier		Fact Procurement Payments	PO Header
Budget Period	PO Id	Supplier Contract Id	Supplier Id	Supplier Long Desc	Monetary Amt	PO Document Type Long Desc
2022	3000006167	0000196965	0000915870	JUJU LLC	22,700.00	Blanket TG/ED/VO
2022	3000006468	0000200982	0000244330	GRAYSTONE GROUP ADVERTISING	1,248.00	Blanket Purchs Agnst A Contract
2022	3000006553	0000202500	0000205465	FEDEX CORP S	118.08	Blanket Purchs Agnst A Contract
Grand Total					24,066.08	

- The EPM Data Warehouse returns you to the *Prompts* tab. Anytime you wish to use this report with the inline prompt, open the *Prompts* tab. You can update the inline prompt as needed.

Prompt Label	Type	Prompt For	Description	Required	New Row
Page 1	Page				
PO Document Type	Column value	PO Document Type Long Desc		✓	<input type="checkbox"/>

Appendices

Appendix A: Guidelines for Choosing an Operator in the New Prompt/Update Prompt Window

Source: "Oracle Smart View for Office User's Guide," Oracle Help Center.
https://docs.oracle.com/cd/E57185_01/SMVUG/ch16s08s04s01.html

Operator	Guidelines
is between	Valid for a column that contains numbers or dates. Specify two values. Result includes only records where the data in the column is between the two values in the filter.
is equal to / is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column matches the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is less than the value in the filter.
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is less than or the same as the value in the filter.
is not equal to / is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not match the value in the filter.
is ranked first	Valid for a column that contains text or dates. Specify a single value. Results include only the first N records, where N is a whole number specified as the value in the filter. This operator is for ranked results.
is ranked last	Valid for a column that contains text or dates. Specify a single value. Results include only the last N records, where N is a whole number specified as the value in the filter. This operator is for ranked results.

Appendix B: Guidelines for Choosing the Default Selection Menu in the New Prompt/Update Prompt Window

Source: https://docs.oracle.com/cd/E17904_01/bi.1111/e10544/prompts.htm#BIEUG2845

Field Name	Field Description
Check Boxes	Provides a list of all prompt values where a small, selectable box displays before each value item. Use this option for a prompt that contains a smaller set of data.
Choice List	Provides a collapsed list of all prompt values. Use this option when there is a long list of values when you want the ability to search for a specific value. You can set it up to accept only one prompt value or multiple prompt values.
List Box	Provides a list of all prompt values. Use this option for a prompt that contains a large set of data.
Radio Buttons	Provides a list of all prompt values where a Radio button is displayed before each prompt value. Use this option when there is a short list of values, and you want to select only one prompt value.
Slider	Depending upon the operator that you select, this option allows the user to select multiple values by specifying a range of values, or all values that are lesser than, greater than, or equal to a specified value. Use it for numerical data values only.
Text Field	The Text Field input option provides the users with a field to type a specific prompt value. You cannot use this option for multiple prompt values. Only the field and the field label display for this option. Use it in instances where the user will know the prompt value and not have to search for it, or for prompts with numeric values.