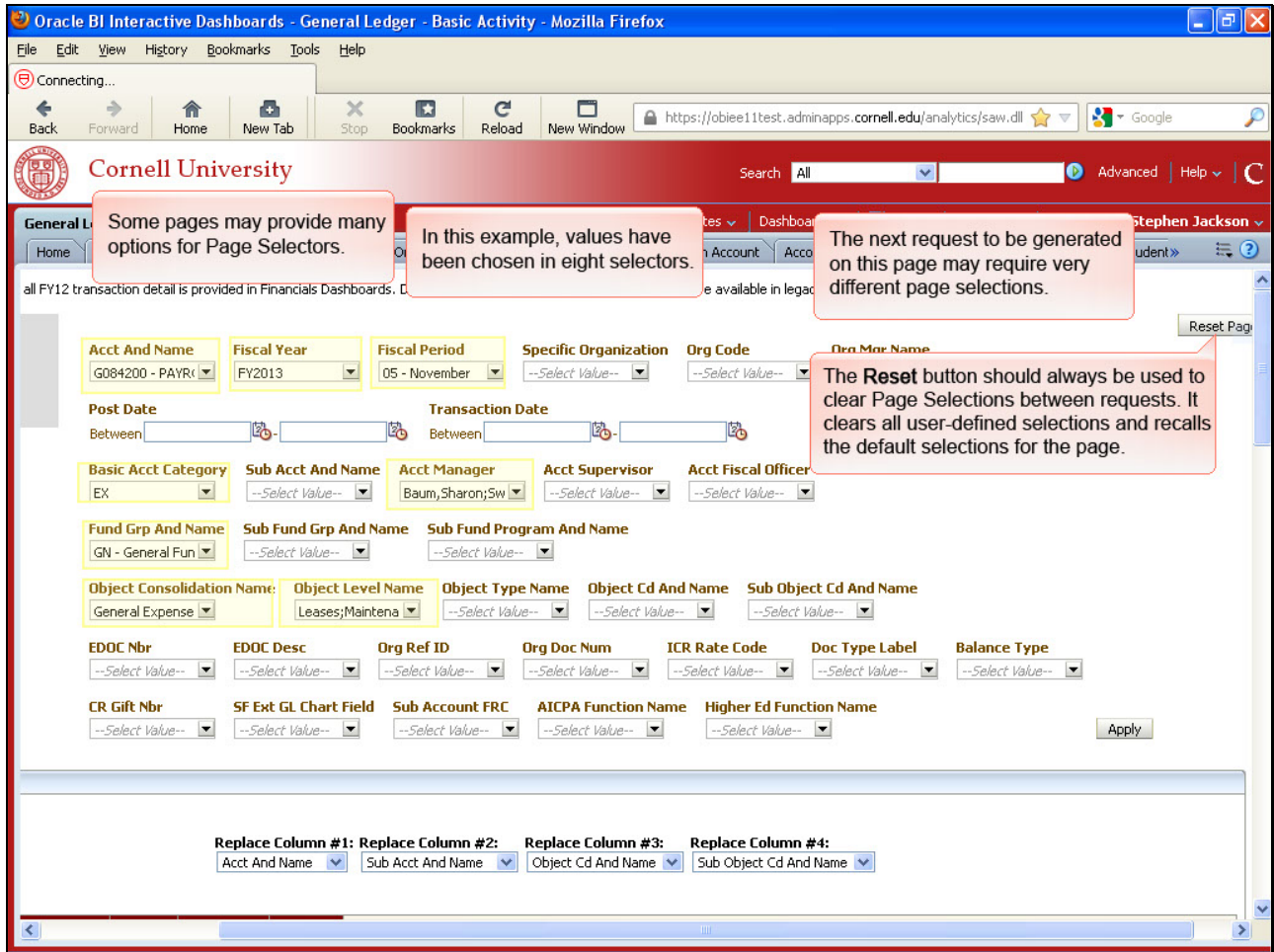


Chapter 11: Saving Page Customizations & Page Defaults



Some pages may provide many options for Page Selectors.

In this example, values have been chosen in eight selectors.

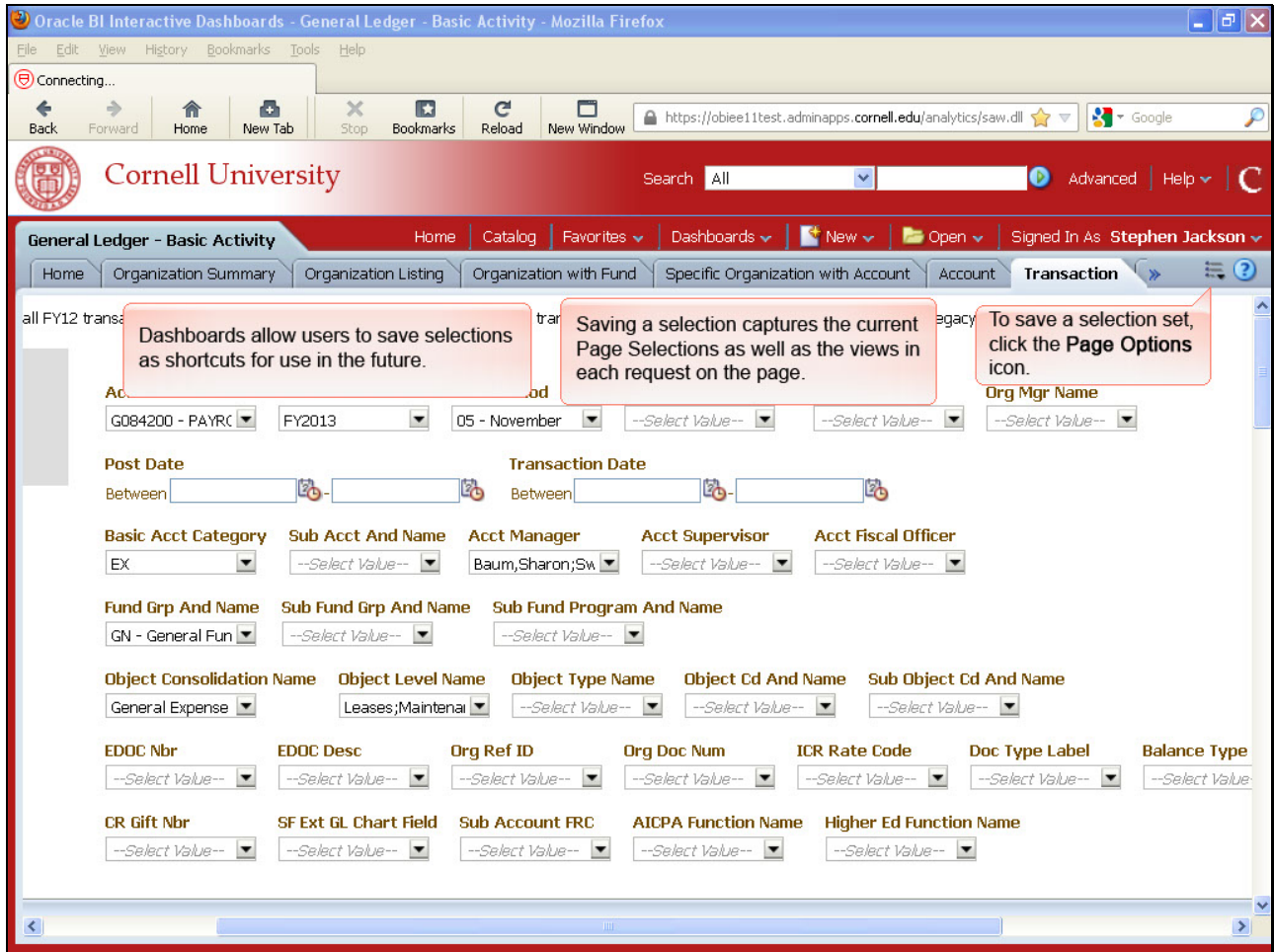
The next request to be generated on this page may require very different page selections.

The **Reset** button should always be used to clear Page Selections between requests. It clears all user-defined selections and recalls the default selections for the page.

The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox
- Address Bar:** https://obiee11test.adminapps.cornell.edu/analytics/saw.dll
- Page Header:** Cornell University logo and search bar.
- Navigation:** Home | Catalog | Favorites | Dashboards | New | Open | Signed In As Stephen Jackson
- Page Content:** General Ledger - Basic Activity. A message states: "2 transaction detail is provided in Financials Dashboards. Detailed transactions supporting all FY11 activity are available in legacy reporting tools."
- Form Fields:**
 - Acct And Name: G234715 - UNIV
 - Fiscal Year: FY2013
 - Fiscal Period: 05 - November
 - Specific Organization: --Select Value--
 - Org Code: --Select Value--
 - Org Mgr Name: --Select Value--
 - Post Date: Between []
 - Transaction Date: Between []
 - Basic Acct Category: EX
 - Sub Acct And Name: --Select Value--
 - Acct Manager: Sweazey, Sandra
 - Acct Supervisor: --Select Value--
 - Acct Fiscal Officer: --Select Value--
 - Fund Grp And Name: GN - General Fur
 - Sub Fund Grp And Name: --Select Value--
 - Sub Fund Program And Name: --Select Value--
 - Object Consolidation Name: General Expense
 - Object Level Name: Leases;Services;
 - Object Type Name: --Select Value--
 - Object Cd And Name: --Select Value--
 - Sub Object Cd And Name: --Select Value--
 - EDOC Nbr: --Select Value--
 - EDOC Desc: --Select Value--
 - Org Ref ID: --Select Value--
 - Org Doc Num: --Select Value--
 - ICR Rate Code: --Select Value--
 - Doc Type Label: --Select Value--
 - Balance Type: --Select Value--
 - CR Gift Nbr: --Select Value--
 - SF Ext GL Chart Field: --Select Value--
 - Sub Account FRC: --Select Value--
 - AICPA Function Name: --Select Value--
 - Higher Ed Function Name: --Select Value--
- Buttons:** An "Apply" button is located at the bottom right of the form area.
- Callout Box:** A red-bordered box with a pointer to the "Apply" button contains the text: "Once the selections have been made click Apply."
- Footer:** Replace Column #1: Replace Column #2: Replace Column #3: Replace Column #4:

Once the selections have been made, click **Apply**.



Dashboards allow users to save selections as shortcuts for use in the future.

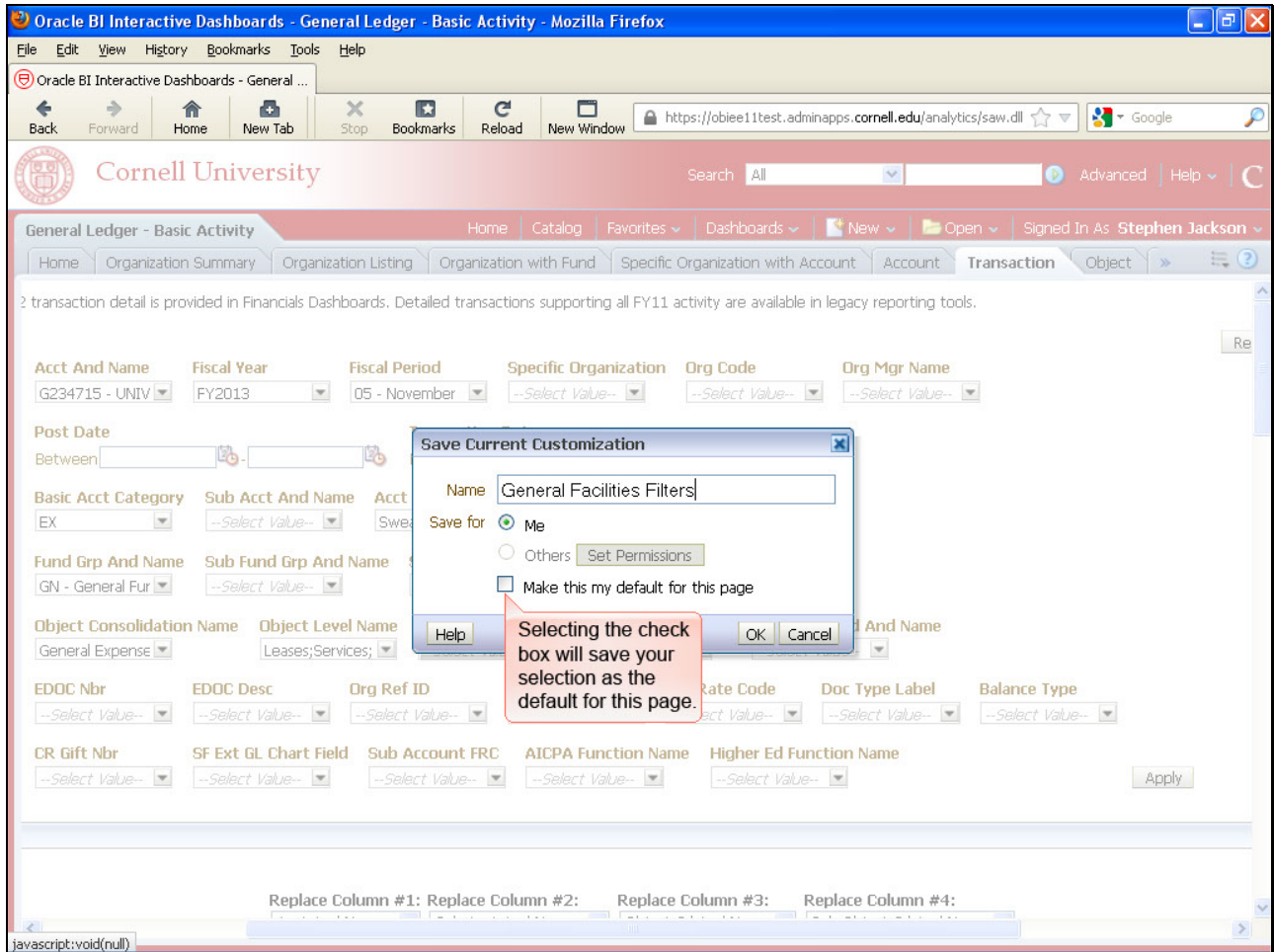
Saving a selection captures the current Page Selections as well as the views in each request on the page.

To save a selection set, click the **Page Options** icon.

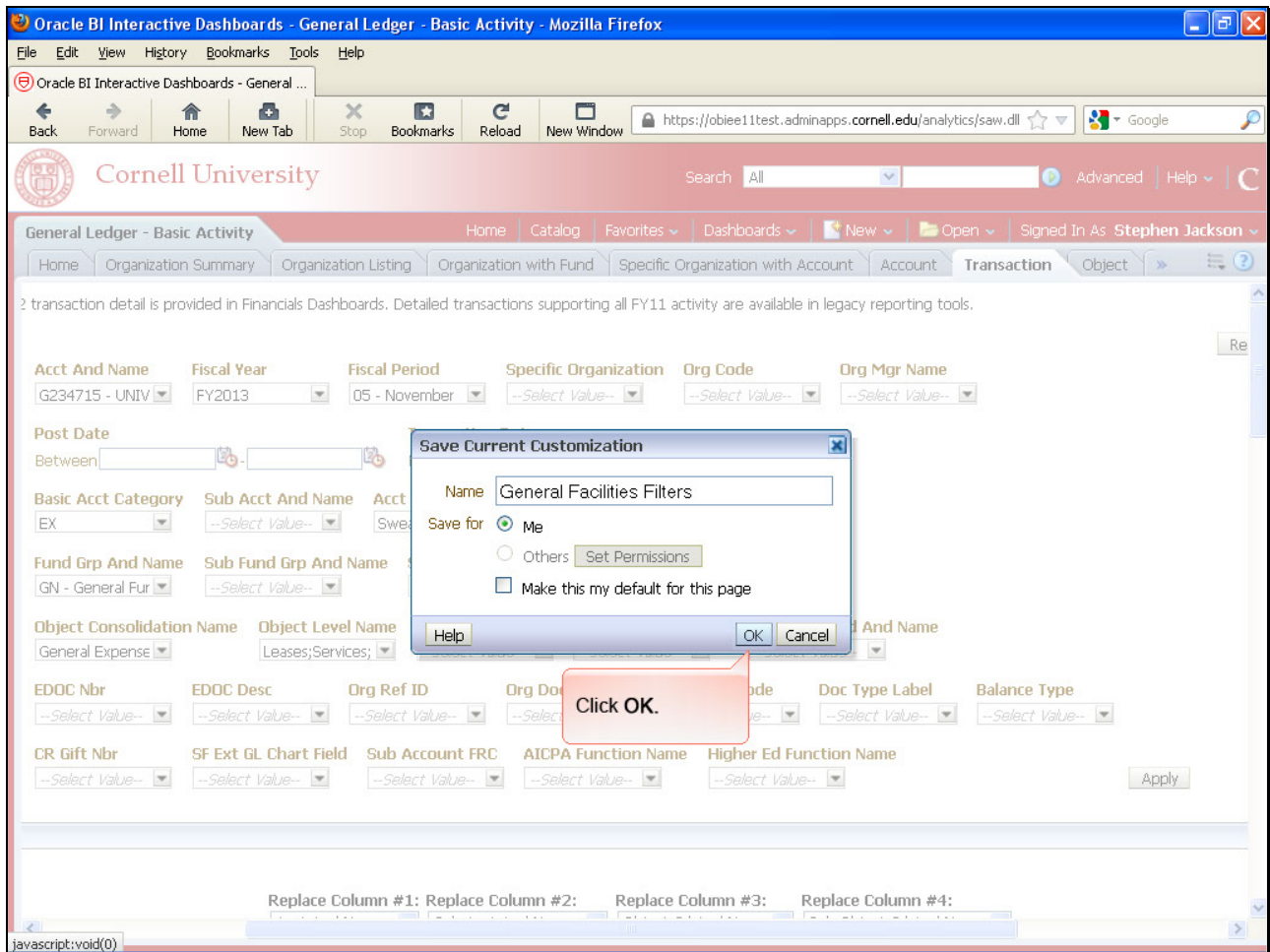
The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox
- Address Bar:** https://obiee11test.adminapps.cornell.edu/analytics/saw.dll
- Page Header:** Cornell University logo and search bar.
- Navigation Bar:** Home, Catalog, Favorites, Dashboards, New, Open, Signed In As Stephen Jackson.
- Page Content:** A series of filter fields including:
 - Acct And Name: G234715 - UNIV
 - Fiscal Year: FY2013
 - Fiscal Period: 05 - November
 - Specific Organization: --Select Value--
 - Org Code: --Select Value--
 - Org Mgr Name: --Select Value--
 - Post Date: Between []
 - Transaction Date: Between []
 - Basic Acct Category: EX
 - Sub Acct And Name: --Select Value--
 - Acct Manager: Sweazey, Sandra
 - Acct Supervisor: --Select Value--
 - Fund Grp And Name: GN - General Fur
 - Sub Fund Grp And Name: --Select Value--
 - Sub Fund Program And Name: --Select Value--
 - Object Consolidation Name: General Expense
 - Object Level Name: Leases;Services;
 - Object Type Name: --Select Value--
 - Object Cd And Name: --Select Value--
 - Sub Object Cd And Name: --Select Value--
 - EDOC Nbr: --Select Value--
 - EDOC Desc: --Select Value--
 - Org Ref ID: --Select Value--
 - Org Doc Num: --Select Value--
 - ICR Rate Code: --Select Value--
 - Doc Type Label: --Select Value--
 - Balance Type: --Select Value--
 - CR Gift Nbr: --Select Value--
 - SF Ext GL Chart Field: --Select Value--
 - Sub Account FRC: --Select Value--
 - AICPA Function Name: --Select Value--
 - Higher Ed Function Name: --Select Value--
- Context Menu:** Opened over the 'Transaction' tab, showing options like Print, Refresh, Create Bookmark Link, Apply Saved Customization, Save Current Customization..., Edit Saved Customizations..., and Clear My Customization.
- Callout:** A red box with the text "Next, highlight Save Current Customization..." pointing to the 'Save Current Customization...' menu item.

Next, highlight **Save Current Customization...**



Selecting the check box will save your selection as the default for this page.



Click **OK**.

Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Oracle BI Interactive Dashboards - General ...

Back Forward Home New Tab Stop Bookmarks Reload New Window

https://obiee11test.adminapps.cornell.edu/analytics/saw.dll

Cornell University

Search All Advanced Help

General Ledger - Basic Activity Home Catalog Favorites Dashboards New Open Signed In As Stephen Jackson

Home Organization Summary Organization Listing Organization with Fund Specific Organization with Account Account Transaction Object

Financials Dashboards. Detailed transactions supporting all FY11 activity are available in legacy reporting tools.

Reset Page

Year: .3 Fiscal Period: 05 - November Specific Organization: --Select Value-- Org Code: --Select Value-- Org Mgr Name: --Select Value--

Transaction Date: Between

Acct And Name: --Select Value-- Acct Manager: Sweazey, Sandra Acct Supervisor: --Select Value-- Acct Fiscal Officer: --Select Value--

Fund Grp And Name: --Select Value-- Sub Fund Program And Name: --Select Value--

Object Level Name: Leases;Services; Object Type Name: --Select Value-- Object Cd And Name: --Select Value-- Sub Object Cd And Name: --Select Value--

Desc: --Select Value-- Org Ref ID: --Select Value-- Org Doc Num: --Select Value-- ICR Rate Code: --Select Value-- Doc Type Label: --Select Value-- Balance Type: --Select Value--

GL Chart Field: --Select Value-- Sub Account FRC: --Select Value-- AICPA Function Name: --Select Value-- Higher Ed Function Name: --Select Value--

Apply

Replace Column #1: Replace Column #2: Replace Column #3: Replace Column #4:

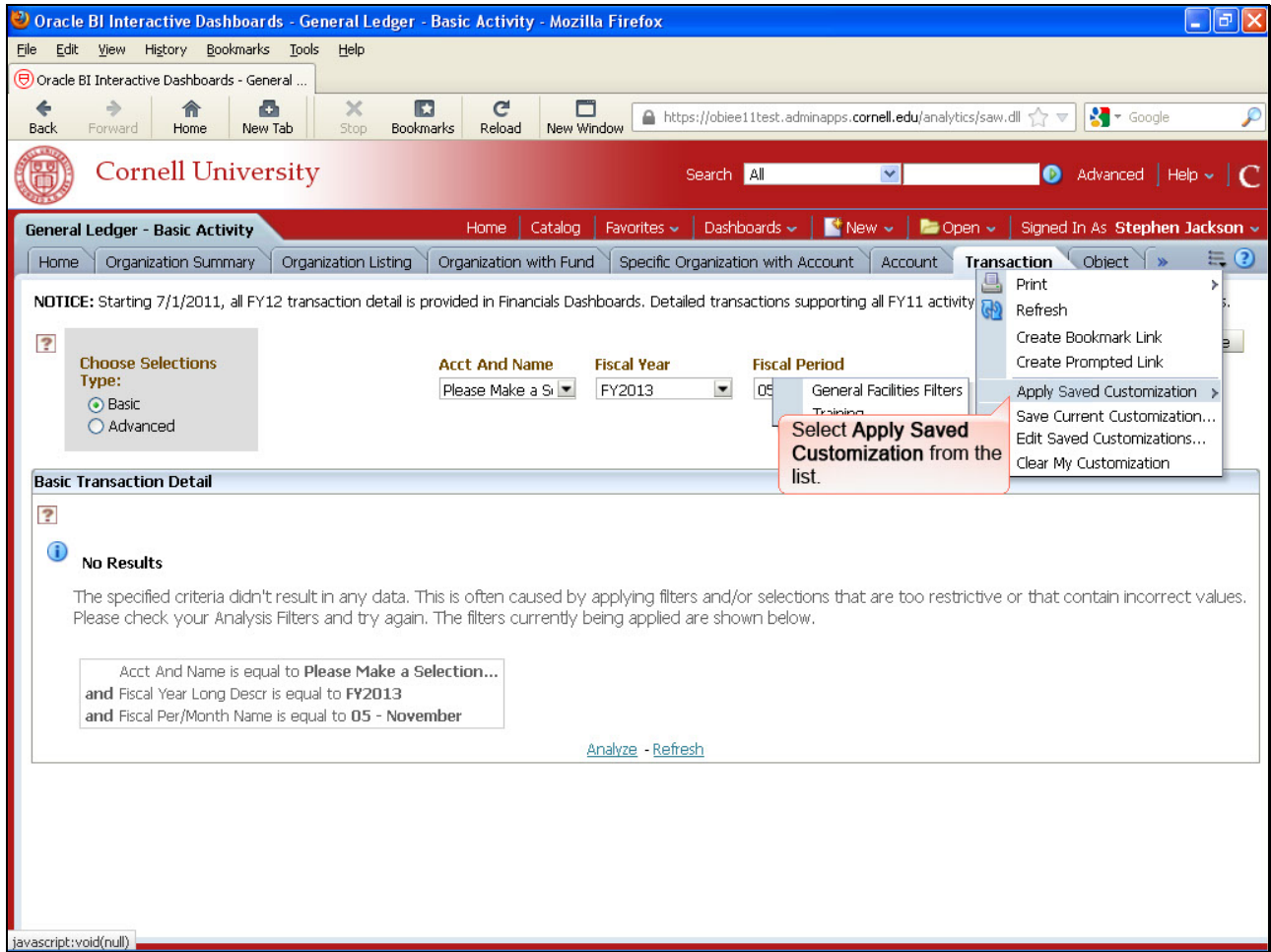
https://obiee11test.adminapps.cornell.edu/analytics/saw.dll?Dashboard&SelectionPath=/users/sbj...ctivity&Page=Transaction&PageIdentifier=q57dj19hl7hgq54p&ViewState=4p2d96s37ou9t58n9jel0365o6#

To verify that the selection was saved correctly, click **Reset Page** to restore the default page selections.

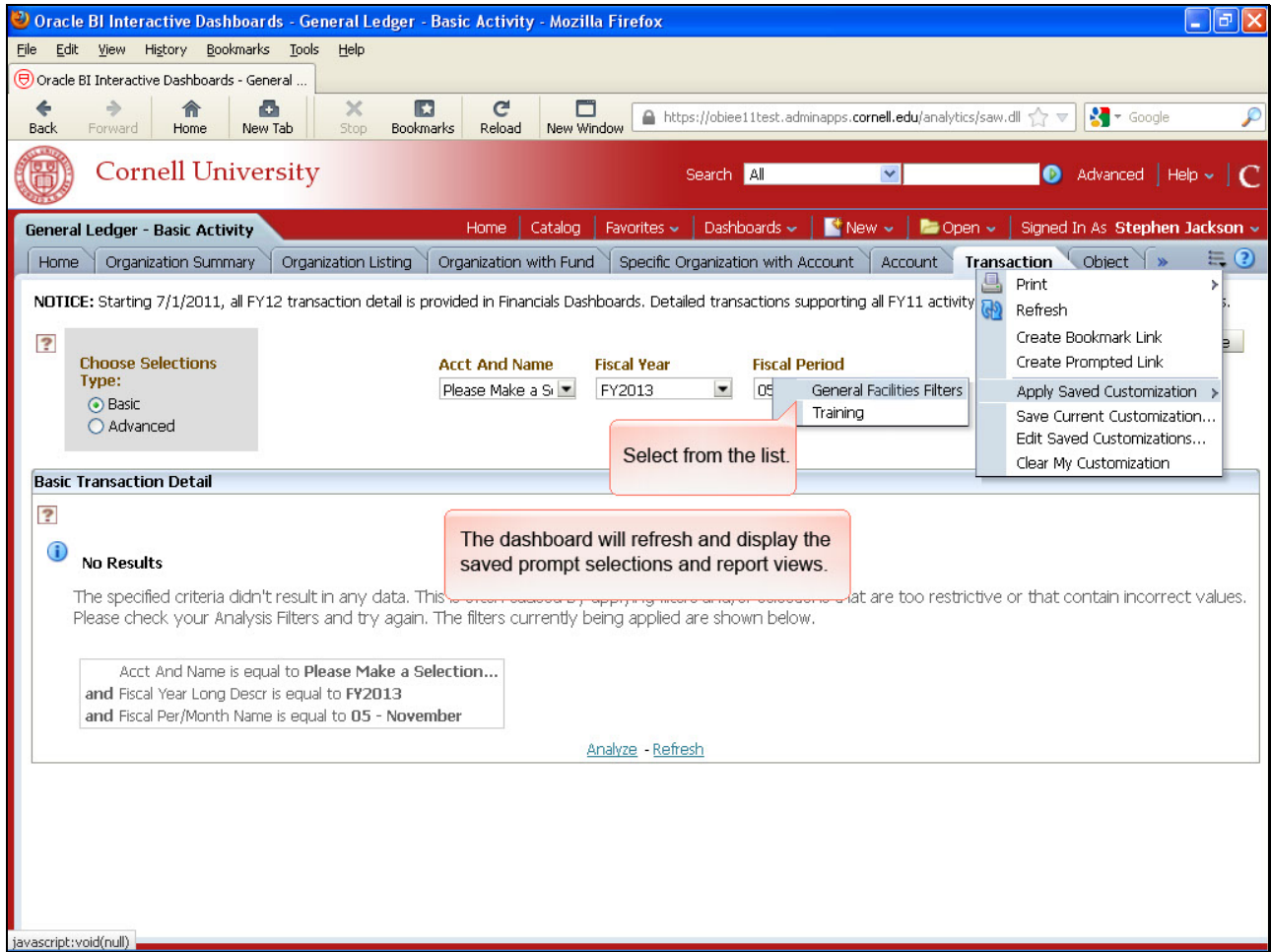
The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox
- Address Bar:** https://obiee11test.adminapps.cornell.edu/analytics/saw.dll
- Page Header:** Cornell University logo and search bar.
- Navigation Bar:** Home | Catalog | Favorites | Dashboards | New | Open | Signed In As Stephen Jackson
- Sub-headers:** Home | Organization Summary | Organization Listing | Organization with Fund | Specific Organization with Account | Account | **Transaction** | Object
- Notice:** NOTICE: Starting 7/1/2011, all FY12 transaction detail is provided in Financials Dashboards. Detailed transactions supporting all FY11 activity are available.
- Form Fields:**
 - Choose Selections Type: Basic, Advanced
 - Acct And Name: Please Make a Selection...
 - Fiscal Year: FY2013
 - Fiscal Period: 05 - November
 - Apply button
- Basic Transaction Detail Section:**
 - No Results**
 - Message: The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.
 - Applied Filters:
 - Acct And Name is equal to Please Make a Selection...
 - and Fiscal Year Long Descr is equal to FY2013
 - and Fiscal Per/Month Name is equal to 05 - November
 - Buttons: [Analyze](#) - [Refresh](#)

Next, select the saved customization from the **page Options**.



Select **Apply Saved Customization** from the list.



Select from the list.

The dashboard will refresh and display the saved prompt selections and report views.

The screenshot shows a web browser window titled "Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox". The address bar shows the URL "https://obiee11test.adminapps.cornell.edu/analytics/saw.dll". The page header includes the Cornell University logo and a search bar. The main navigation bar shows "General Ledger - Basic Activity" and "Transaction" is selected. Below the navigation bar, there is a message: "2 transaction detail is provided in Financials Dashboards. Detailed transactions supporting all FY11 activity are available in legacy reporting tools." The main content area contains several filter sections with dropdown menus and text boxes:

- Acct And Name:** G234715 - UNIV
- Fiscal Year:** FY2013
- Fiscal Period:** 05 - November
- Specific Organization:** --Select Value--
- Org Code:** --Select Value--
- Org Mgr Name:** --Select Value--

Post Date: Between [] []

Transaction Date: Between [] []

- Basic Acct Category:** EX
- Sub Acct And Name:** --Select Value--
- Acct Manager:** Sweazey, Sandra
- Acct Supervisor:** --Select Value--
- Acct Fiscal Officer:** --Select Value--

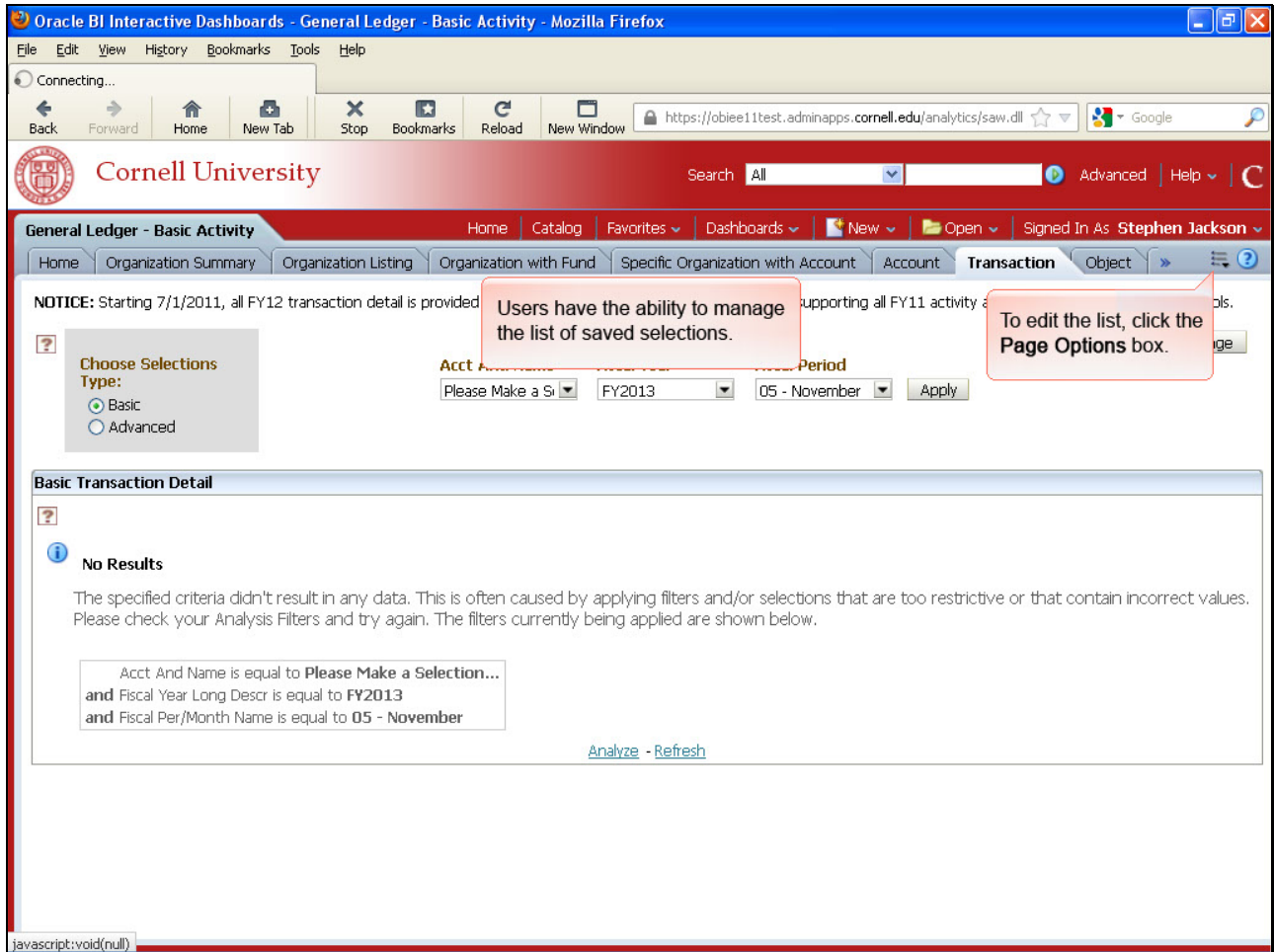
- Fund Grp And Name:** GN - General Fur
- Sub Fund Grp And Name:** --Select Value--
- Sub Fund Program And Name:** --Select Value--

- Object Consolidation Name:** General Expense
- Object Level Name:** Leases;Services;
- Object Type Name:** --Select Value--
- Object Cd And Name:** --Select Value--
- Sub Object Cd And Name:** --Select Value--

- EDOC Nbr:** --Select Value--
- EDOC Desc:** --Select Value--
- Org Ref ID:** --Select Value--
- Org Doc Num:** --Select Value--
- ICR Rate Code:** --Select Value--
- Doc Type Label:** --Select Value--
- Balance Type:** --Select Value--

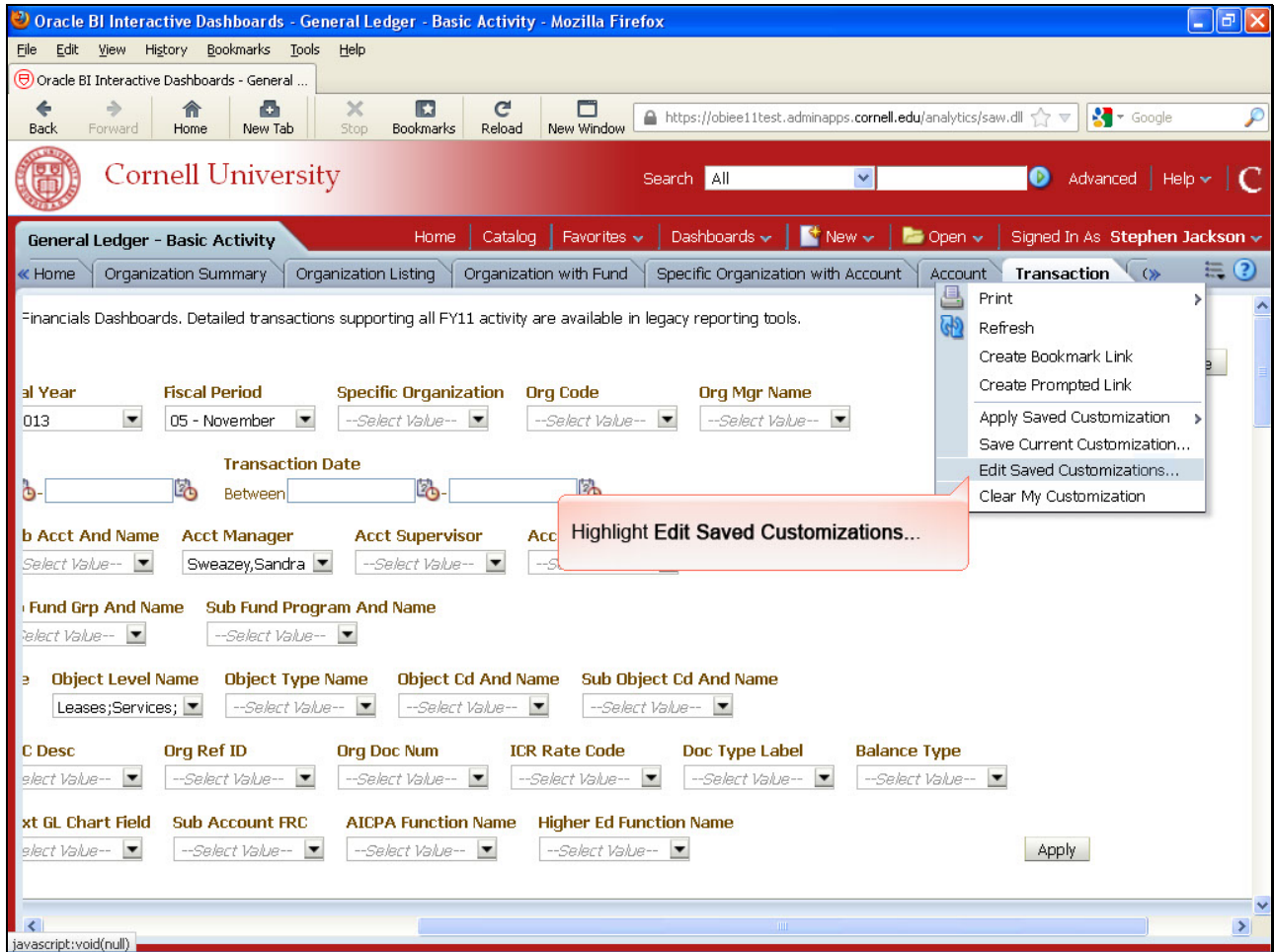
- CR Gift Nbr:** --Select Value--
- SF Ext GL Chart Field:** --Select Value--
- Sub Account FRC:** --Select Value--
- AICPA Function Name:** --Select Value--
- Higher Ed Function Name:** --Select Value--

An "Apply" button is located at the bottom right of the filter section. At the bottom of the page, there are four "Replace Column" labels: "Replace Column #1:", "Replace Column #2:", "Replace Column #3:", and "Replace Column #4:".



Users have the ability to manage the list of saved selections.

To edit the list, click the **Page Options** box.



Highlight Edit Saved Customizations...

Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Oracle BI Interactive Dashboards - General ...

Back Forward Home New Tab Stop Bookmarks Reload New Window

https://obiee11test.adminapps.cornell.edu/analytics/saw.dll

Cornell University Search All Advanced Help

General Ledger - Basic Activity Home Catalog Favorites Dashboards New Open Signed In As Stephen Jackson

Home Organization Summary Organization Listing Organization with Fund Specific Organization with Account Account Transaction

Financials Dashboards. Detailed transactions

Calendar Year: 013 Fiscal Period: 05 - November

Transaction Date: Between

Acct And Name: Select Value-- Acct Manager: Sweazey, Sandra

Fund Grp And Name: Select Value-- Sub Fund Program: --Select Value--

Object Level Name: Leases;Services; Object Type Name: --Select Value--

C Desc: select Value-- Org Ref ID: --Select Value--

Next GL Chart Field: select Value-- Sub Account FRC: --Select Value-- AICPA Function Name: --Select Value-- Higher Ed Function Name: --Select Value--

Reset Page

Edit Saved Customizations

Rename, delete and control group access to Saved Customizations, as well as specify which Saved Customization, if any, should be used as your default for the current Dashboard page.

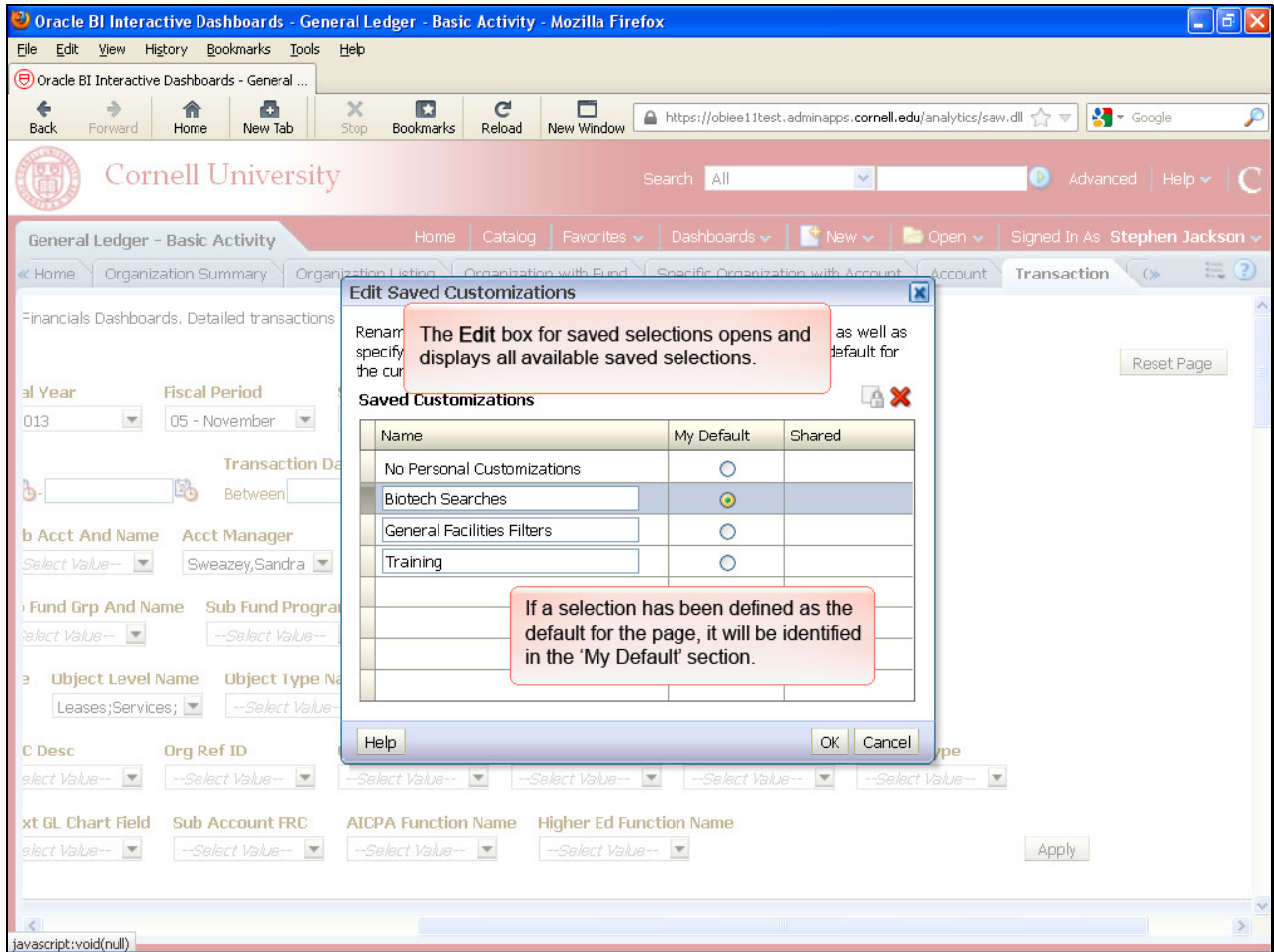
Saved Customizations

Name	My Default	Shared
No Personal Customizations	<input checked="" type="radio"/>	<input type="radio"/>
Biotech Searches	<input type="radio"/>	<input type="radio"/>
General Facilities Filters	<input type="radio"/>	<input type="radio"/>
Training	<input type="radio"/>	<input type="radio"/>

Help OK Cancel

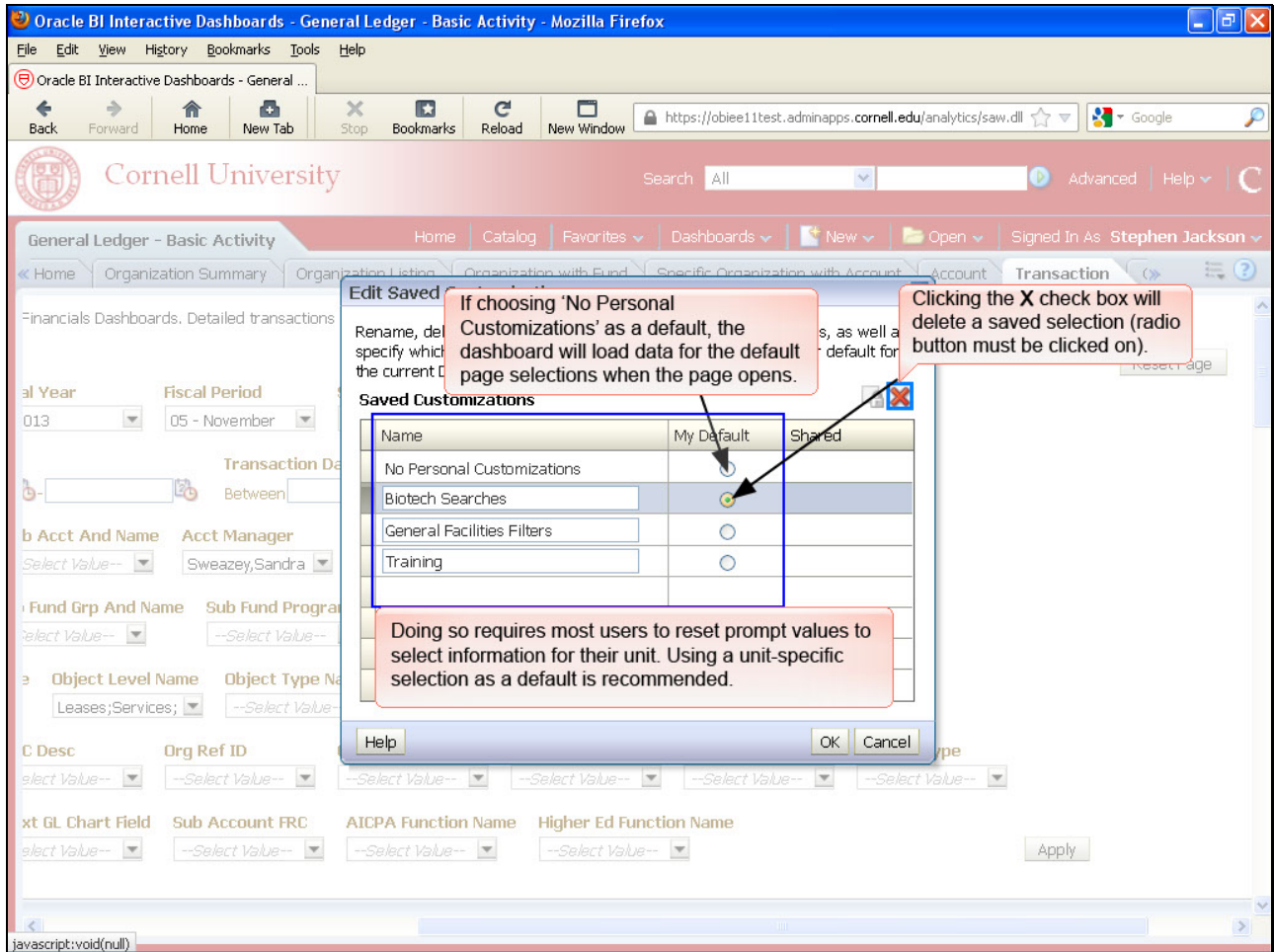
Apply

javascript:void(null)



The **Edit** box for saved selections opens and displays all available saved selections.

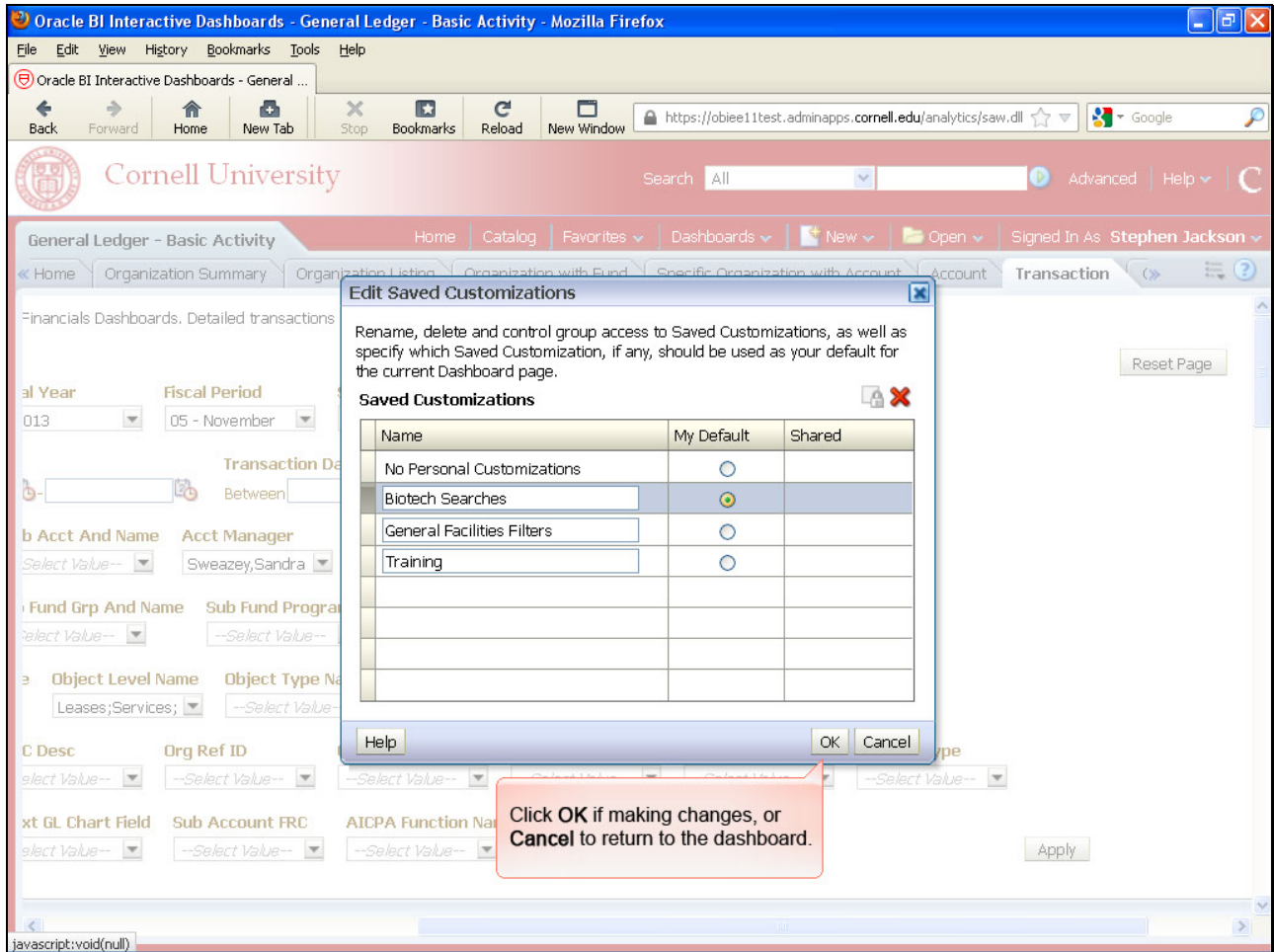
If a selection has been defined as the default for the page, it will be identified in the 'My Default' section.



If choosing 'No Personal Customizations' as a default, the dashboard will load data for the default page selections when the page opens.

Doing so requires most users to reset prompt values to select information for their unit. Using a unit-specific selection as a default is recommended.

Clicking the X check box will delete a saved selection (radio button must be clicked on).



Click **OK** if making changes, or **Cancel** to return to the dashboard.