

# ESR Business Intelligence

## Searching in ESR Business Intelligence

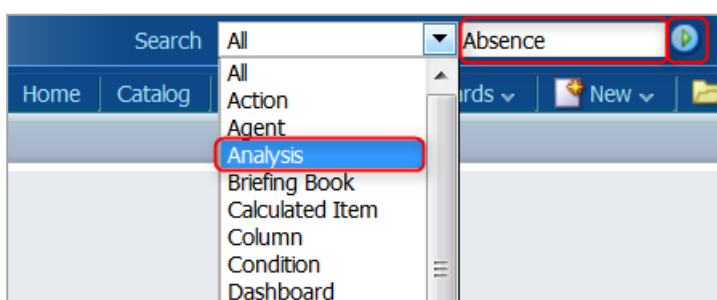
### Introduction

This guide has been created to ensure Users are aware of the different Search options available within ESR Business Intelligence (ESR BI):

### Searching the Catalog

#### Option 1

A search facility is available within the ESRBI Global Header which allows users to quickly search for Catalog objects. In the Search field, click the drop-down list and select the object type for which you want to search. Place the cursor in the field next to the Search type and enter part or all of the object's name or description:

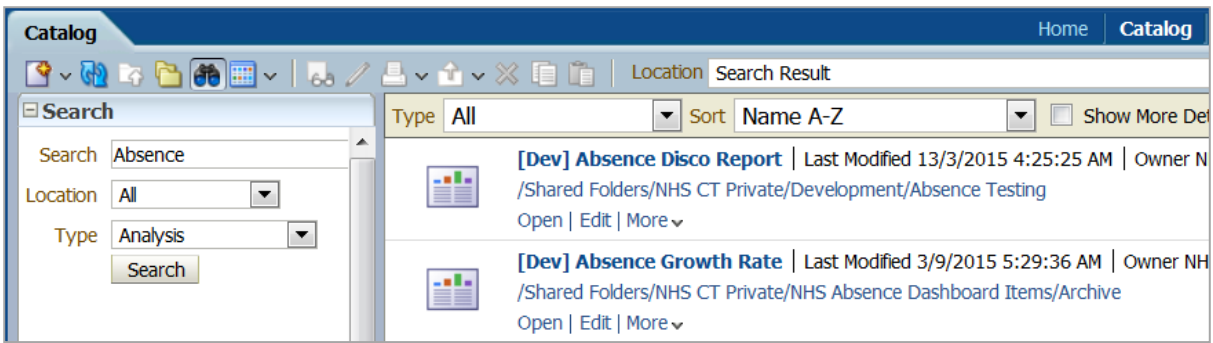


Once the icon (Green Arrow) is clicked, the Catalog page displays the results that match the search criteria:



## Electronic Staff Record





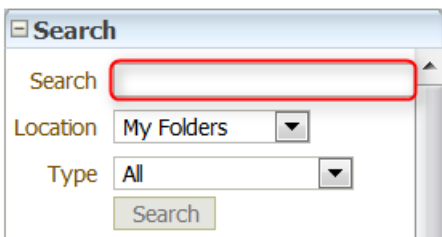
**Navigation Path:** Business Intelligence > Search

## Option 2

Users are also able to search for dashboards or any other BI objects saved in the Catalog using the Advanced Search facility in the upper left corner of the Catalog page:



Once the icon (Binoculars) is clicked, a search box is made available to enter the search criteria:

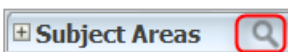


By default, Location is set to My Folders and Type is set to All meaning the search criteria will only return all matching objects from the My Folders location. Users can change the Location to the Shared Folders option and specify what Type of object(s) to search for e.g. Analysis, Dashboard or Filter.

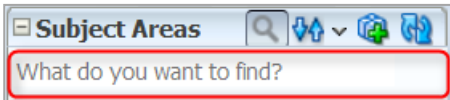
**Navigation Path:** Business Intelligence > Catalog > Binoculars Icon

## Searching the Subject Areas

A search facility is available within ESR BI on the Subject Areas Pane. It allows users to search for data items within a Subject Area(s):

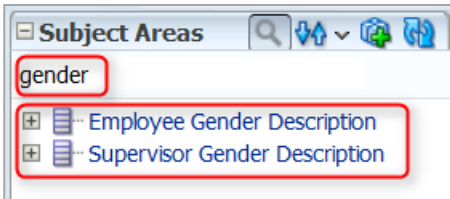


Once the icon (Magnifying Glass) is clicked, a search box is made available allowing users to enter the search criteria:



After entering a search criteria, press enter and ESRBI returns all items that contain part or all of the text entered.

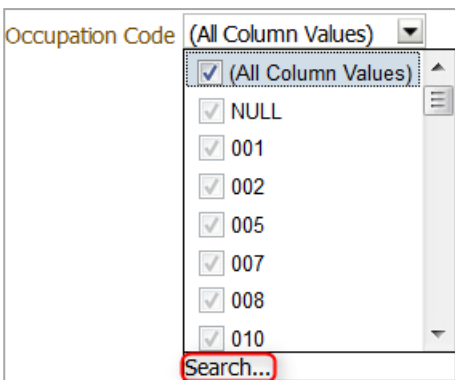
**Please Note:** This feature also works with the % wildcard search.



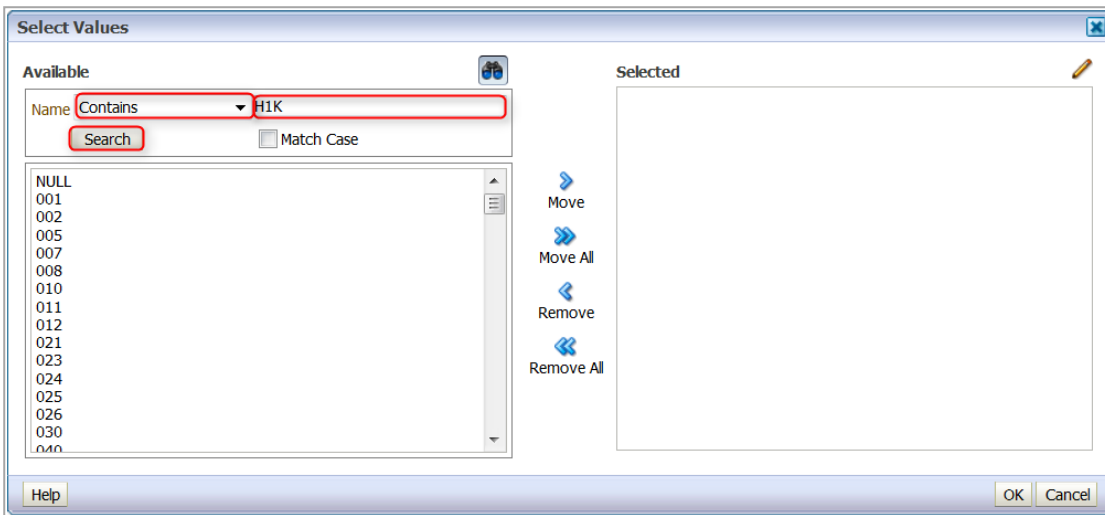
**Navigation Path:** Business Intelligence > New > Analysis > Select Subject Area > Magnifying Glass Icon

## Searching a Dashboard Prompt

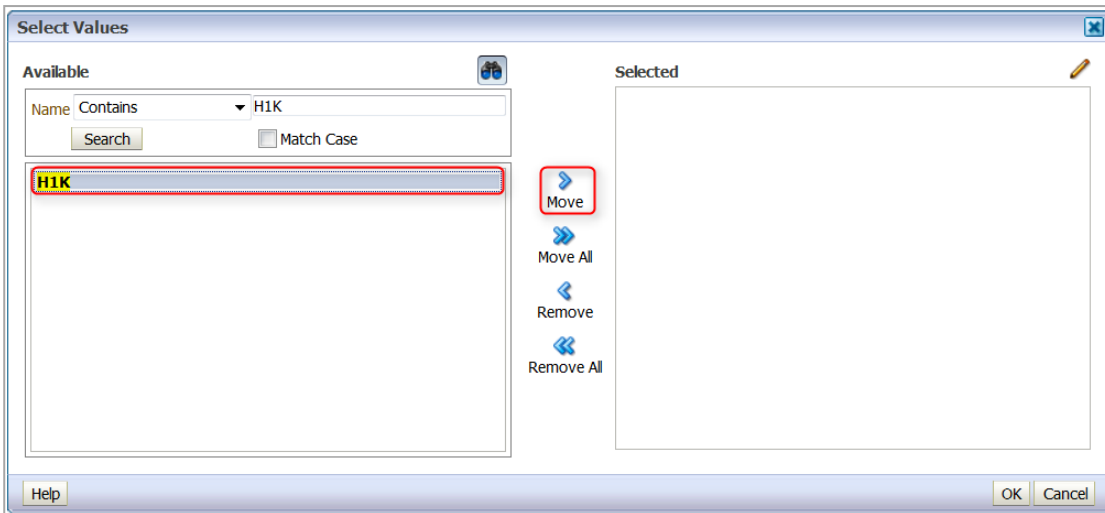
Users are able to search dashboard prompt values, making it possible to quickly select only the values they require. The 'Search' function is located at the bottom of each dashboard prompt list of values:



Once the Search button is clicked, users are presented with a 'Select Values' window which allows users to search for values. Within the Name field, click the drop-down list and select one of the four choices available (Contains, is Like (Pattern Match), Starts and Ends). Place the cursor in the search field and enter the search value as required:

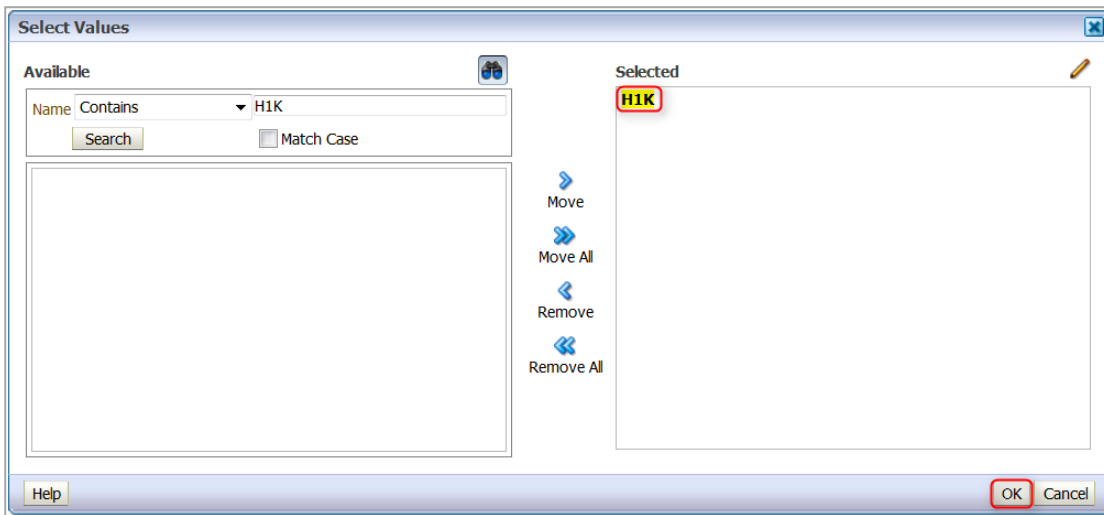


Once the Search button is clicked, users are presented with the results of the search criteria:

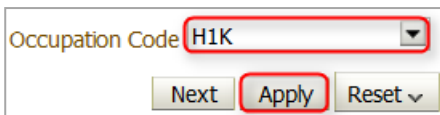


Select the desired returned value(s) and click the Move option.

**Please Note:** It is also possible to select and move more than one value using the Shift key.



Once the value(s) has been moved to the Selected pane, click the OK button and the Prompt will be populated with the specified value(s) as shown in the below example:



Click Apply and the analysis will filter the data accordingly.

**Navigation Path:** Business Intelligence > Dashboard > Dashboard Prompt > Prompt Drop-down List > Search

