

Oracle Financial Services

Expressions Editor User Guide



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About Expressions

An Expression is a user-defined tool that supplements other IDs and enables to manipulate data flexibly.

Expressions help you to perform the following tasks, easily.

- Specify a calculated column that the Oracle Financial Services Analytical Application derives from other columns in the database.
- Calculate assignments in data correction.
- Create calculated conditions in data and relationship filters.

Roles and Functions

The following table lists the role codes and function codes required to use the expressions editor. Based on the role that you are mapped to, you can access read, modify or authorize Expression definitions.

Table 1-1 Roles and Functions

Role Code	Function Code
EXPR_WRITE	EXPR_ADD
EXPR_ADV	EXPR_AUTH
EXPR_MAINT	EXPR_SUMM
EXPR_OPER	EXPR_MOD
EXPR_AUTH	EXPR_VIEW
	EXPR_DEL
	EXPR_COPY

Expressions Summary Page

The **Expression Summary** page displays the list of pre-defined Expressions with other details such as the Expression Name, Folder Name, Return Date, Created By and Creation Date.

You can also search for a specific Expression definition based on Folder Name, Expression Name, and Return Type.

Adding Expression Definition

This option allows you to add an expression definition using columns, operators, functions and constants.

To create a new Expression from the Expressions Summary page:

1. Click **Actions** and select **Add** in the Expressions summary page.

The **Add Expression** page is displayed.

2. Enter the unique **Expression Name**.

 Note:

The characters & ' " are restricted

3. Enter the **Description** for the new expression.

 Note:

The characters ~&+ ' "@ are restricted

4. Enable the **Access Type** if the other users can view and edit the expressions. By default, the Access Type is set to Read Only and the users can only view the expressions.
5. Select the **Folder Name** from the drop-down list.
The new expression is associated with the selected folder. The folders are displayed based on the role and the access level of the logged in user. The folder names are displayed as sorted in alphabetical order in the dropdown menu.
6. Select the **Table** to process using the new Expression. Tables are limited to Instrument tables, Virtual Portfolio table, Transaction Summary tables and PFT Lookup tables.
7. Enter the expression to process the data based on the selected table. Refer to the following rules while adding/editing an expression.

 Note:

- You can edit and navigate within the expression editor only using the keyboard.
- To select functions, columns and other entries, from the drop-down list, always use the mouse.
- To add a column, select the **Column** option. Enter **wildcard search** or part of the column name and click **Search Columns**. The columns present in the selected table are displayed in drop-down list. Single click on the column name in the list to include the column in the Expression editor.
- To add a Function, select the **Function** option. Navigate to the required function using the mouse and click to include it in the expression editor. To include value or arguments within the function, focus your pointer to the required position, using the Keyboard. Select the required value using the mouse. You can include a column or constants as arguments.
- To include numerical values in the expression, select **Constants** option, enter the number in the textbox and click the + button.

- To add numerical operators (+, -, * and /), select the **Operator** option. Navigate to the required operator and click to include it in the expression editor.
 - To delete an entry in the Expressions editor, position the pointer at the required entry and press **Backspace key**. You can click **Reset** to clear the expression editor completely.
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8. After entering the required expression, click the **Check mark** button to validate the expression add it to the Expression tile.

Managing Expressions

You can view, edit, copy, delete and view SQL for the existing expressions Definitions from the Expressions Summary Page.

- In the Expressions Summary Page, highlight a specific Expression Definition and click **Action**. The following Options are displayed.
 - **View** - View the Expression Details for a specific Expression Definition.
 - **Edit** - Edit the Expression Details for a specific Expression Definition.
 - **Copy** - Copy the Expression Definition details and create another Definition by changing the unique values like Name and Description.
 - **Delete** - Delete the selected Expression definition.
 - **View SQL** - View the SQL statement for the selected expression.
 - **Check Dependencies** - View the list of dependencies associated with the selected Expression definition.

Glossary

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