



Exercise 1: Accessing Oracle Discoverer

Lesson Description

Lesson 1 is an introduction to Oracle Discoverer, and how to successfully log on as a user.

Training Objectives

At the conclusion of this lesson, Agency Fleet Headquarters Coordinators and Local Fleet Program Coordinators will be able to:

1. Open Discoverer on their desktop computer workstation.
2. Log on to Fleet through Discoverer, using their individual Username and Password.

Methodology

This lesson will be delivered as an Instructor-led exercise.

References. None.

Enclosures. None.

Logging On To Discoverer

To open your Oracle Discoverer, double-click the  Oracle Discoverer icon on your desktop, or click the  Start button on your desktop, and select *Oracle Discoverer 3.1 User Edition* from your *Programs* Menu.

If your Oracle Discoverer application is properly installed, you will briefly see the Oracle Discoverer 3.1 User Edition Start-Up Banner shown in Figure 1-1.

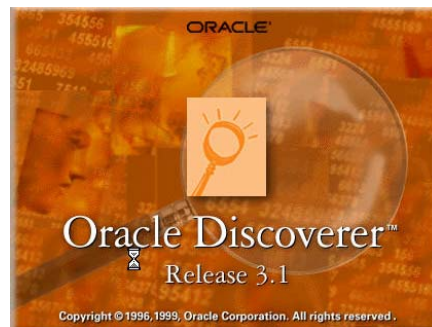



Figure 1-1

Following the Oracle Discoverer Start-Up Banner, you'll see Log In Window shown below in Figure 1-1.



Figure 1-2

Enter your assigned Username, Password, the Connect string or database name you need to access, and click on the  button.

If you've correctly entered your connection information, the initial Workbook Wizard window shown below will appear.

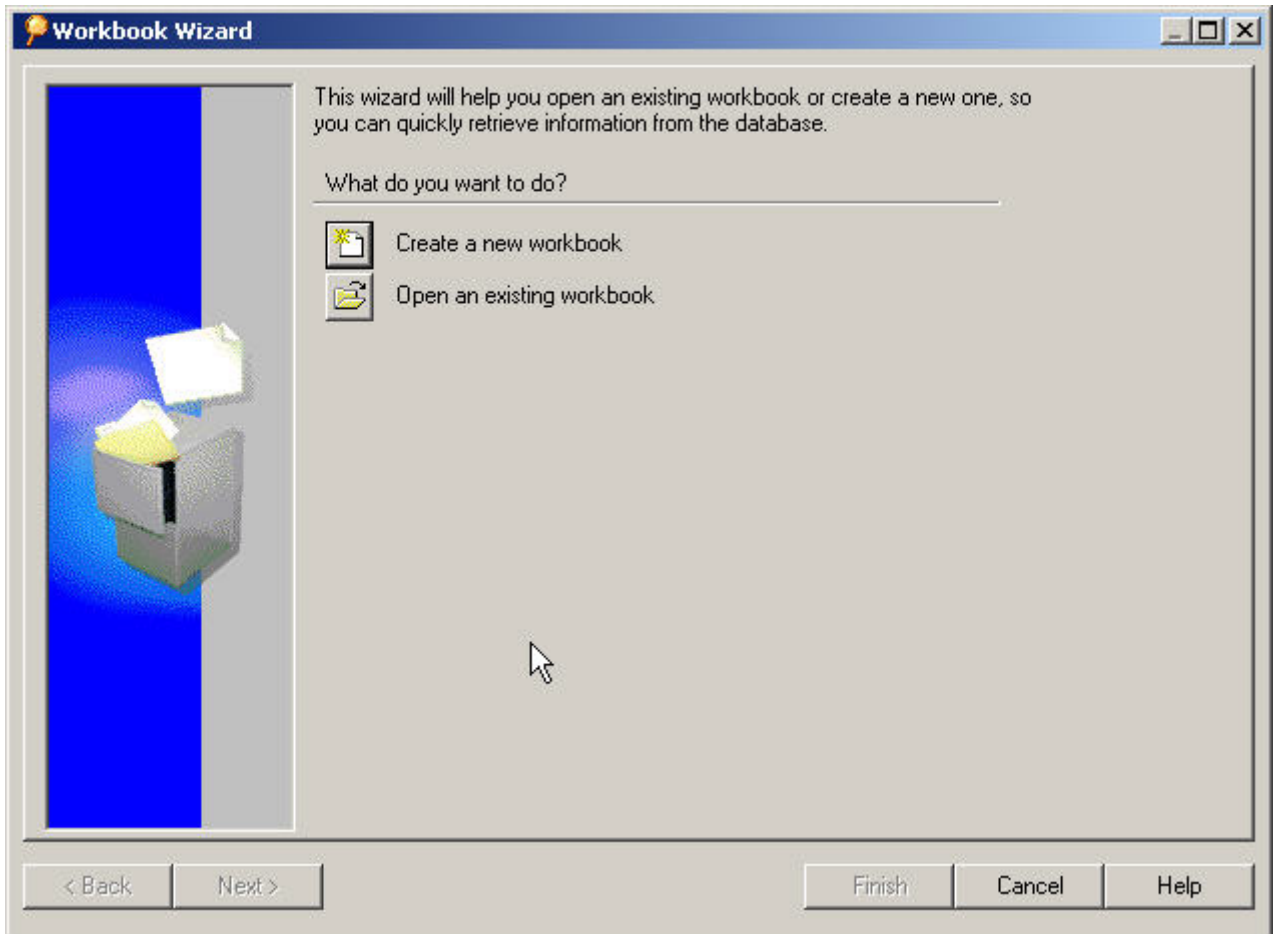


Figure 1-3

Congratulations, you've successfully logged onto Discoverer, and are ready to begin Data Mining!!

Summary. During this short lesson/exercise, you learned to open Discoverer on your desktop computer workstation, and log on to the PCMS database. In the next lesson/exercise, you will learn to create a query using Discoverer's Workbook Wizard, and create a simple report.



Exercise 2: Creating a Basic Report

Lesson Description

Lesson 2 introduces the Workbook Wizard, and the six (6) -step workflow process used to create a simple report.

Training Objectives

At the conclusion of this lesson, Agency Fleet Headquarters Coordinators and Local Fleet Program Coordinators will be able to:

1. Using the Workbook Wizard, develop a simple query.
2. Create a simple report in table format.
3. Save a new report to either a computer or database.

Methodology

This lesson will be delivered as an Instructor-led exercise.

References. None.

Enclosures. None.

The Workbook Wizard

The Workbook Wizard provides a simple six (6)-step workflow process for producing the data you need.

1. Choose a Display Type.
2. Select the Items.
3. Arrange the Layout of the Data.
4. Define the Conditions of Your Query.
5. Sort by Items in Your Table.
6. Create a New Calculation.

The quickest way to build a new query is to use only the first four (4) steps. Using the Workbook Wizard, following Steps 1 through 4 listed above, we'll create a simple report to retrieve the *Voyager No(s)* within your Region/Unit.

Once you've successfully logged on to Discoverer, the first Workbook Wizard window will appear.

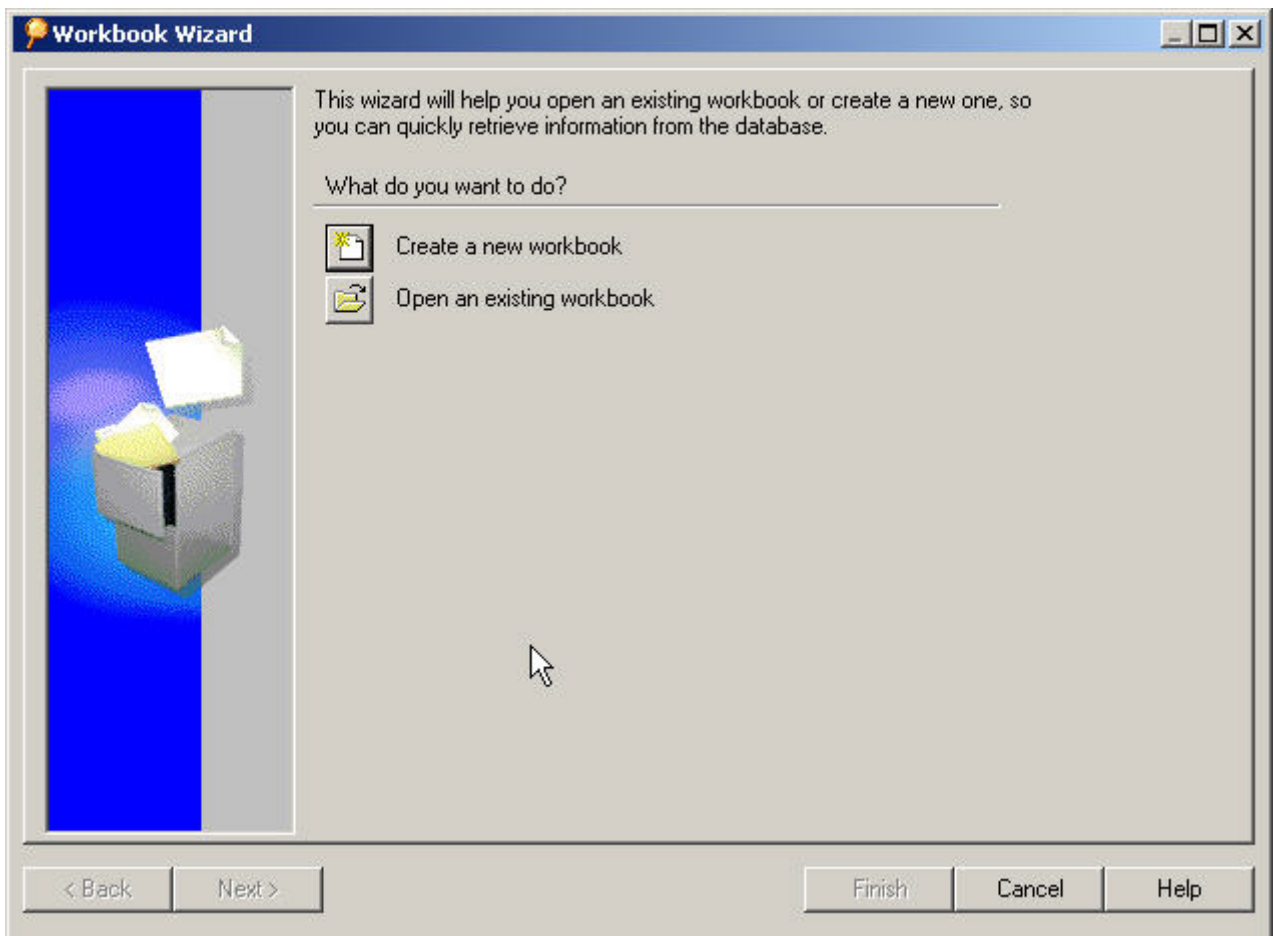


Figure 2-1

The first Workbook Wizard window has five (5) navigation buttons located across the bottom of the window, as seen in Figure 2-1. The remaining Workbook Wizard pages each have six (6) navigation buttons, located at the bottom of the window. See Figure 2-2.



Figure 2-2

The table below provides a description of the functionality of each button at the bottom of the Workbook Wizard screen.

	The 'Back' button returns the Workbook Wizard to the previous screen. When you are on the first Workbook Wizard screen, this button is inactive (gray).
	'Next' moves Workbook Wizard to the next screen. On the first Workbook Wizard screen, this button is inactive until you opt to create a new workbook or use an existing one. This button is also inactive on the final Workbook Wizard screen, as there is no 'Next' screen.
	The 'Options' button sets defaults for query format and display settings. This button is inactive (gray) on the initial Workbook Wizard screen.
	Use the 'Finish' button when completed creating a query. This button is inactive (gray) on the first Workbook Wizard screen, unless you're returning from the second Workbook Wizard screen.
	Use 'Cancel' to cancel the current task or step.
	This button opens a help file on using the Discoverer Workbook Wizard.

Step 1. To begin creating your first report, click to create a new workbook. Doing so opens additional fields below on the same window. See Figure 2-3 below.



Figure 2-3

Click on to select a *Table* format, which will display data in a ‘rows and columns’ format. Then click on to continue building your query, and proceed to the next Workbook Wizard screen.

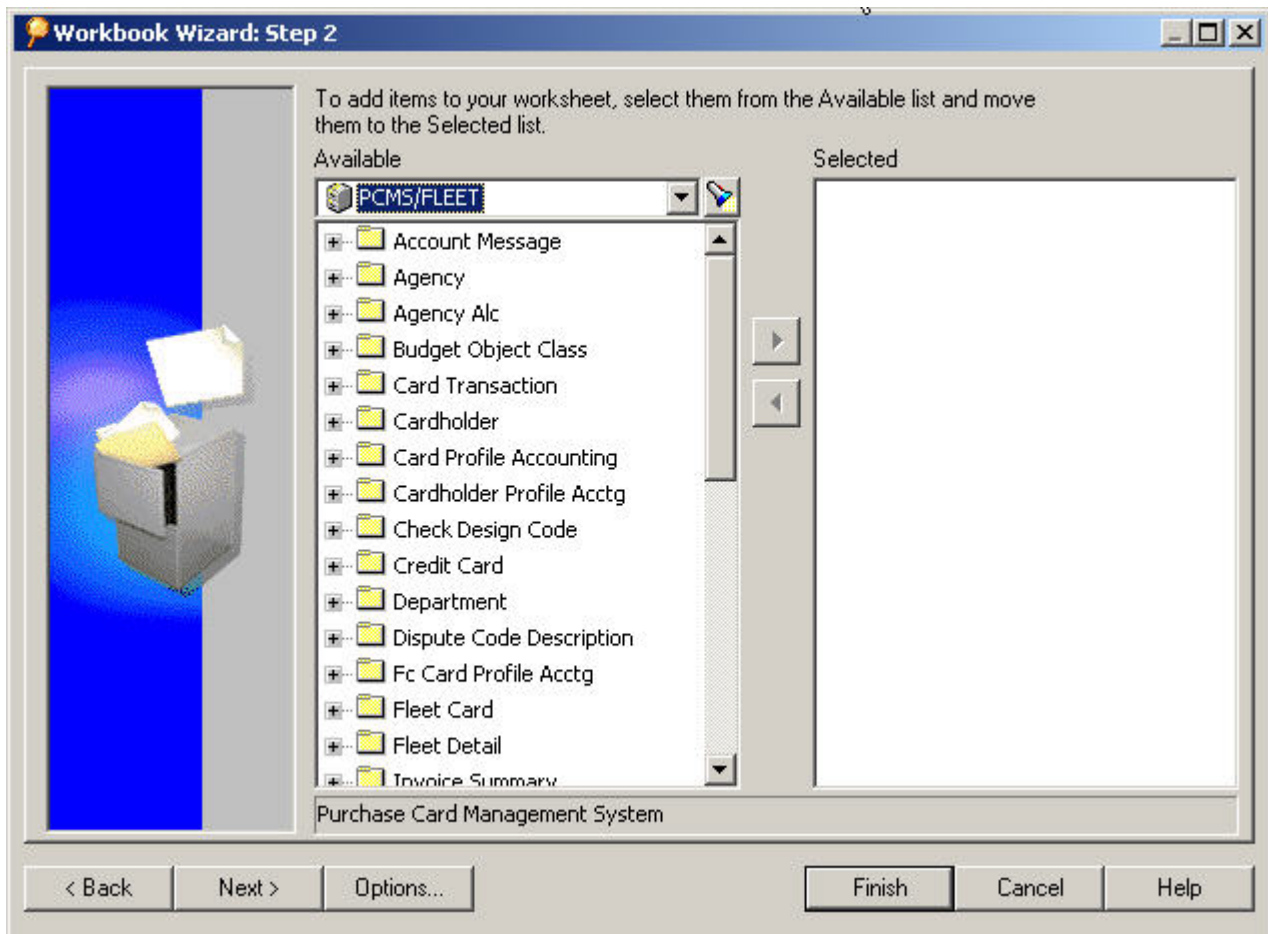


Figure 2-4

Step 2. The next step in the Workbook Wizard workflow process is shown in Figure 2-4 above. At the top of the left-hand column labeled *Available*, note the drop-down list of ‘Business Areas’, which represents logical groupings of folders.

Select by clicking on and then *PCMS/FLEET*, if it does not already appear in this window by default.

A list of folders, analogous to database tables or views associated with the *PCMS/FLEET* Business Area, will appear in the left-hand column. This process may take a few seconds while the Discoverer performs a query and retrieval of folders, associated with *PCMS/FLEET*.


Next, click on the  on the left-hand side of the *Fleet Card* folder. See Figure 2-5 below.



Figure 2-5

A list of items, similar to the columns of database tables or views, will appear beneath the *Cardholder* folder. (Figure 2-6)



Figure 2-6

Now you're ready to select the data fields needed to run your first query. This can be accomplished in two (2) ways:

1. The fastest way is to click on an item, and then drag-and-drop the item anywhere in the right-hand column labeled *Selected*.
2. Alternatively, you can click on an item, highlighting it, and then click on the left-facing arrow located between the *Available* and *Selected* columns

Select the following items from the *Available* list, using one of the methods described above.

1. *Region*
2. *Unit*
3. *Sub Unit*
4. *Prop Number*
5. *Voyager No*

When completed, your *Selected* column should appear like the window shown in Figure 2-7 below.

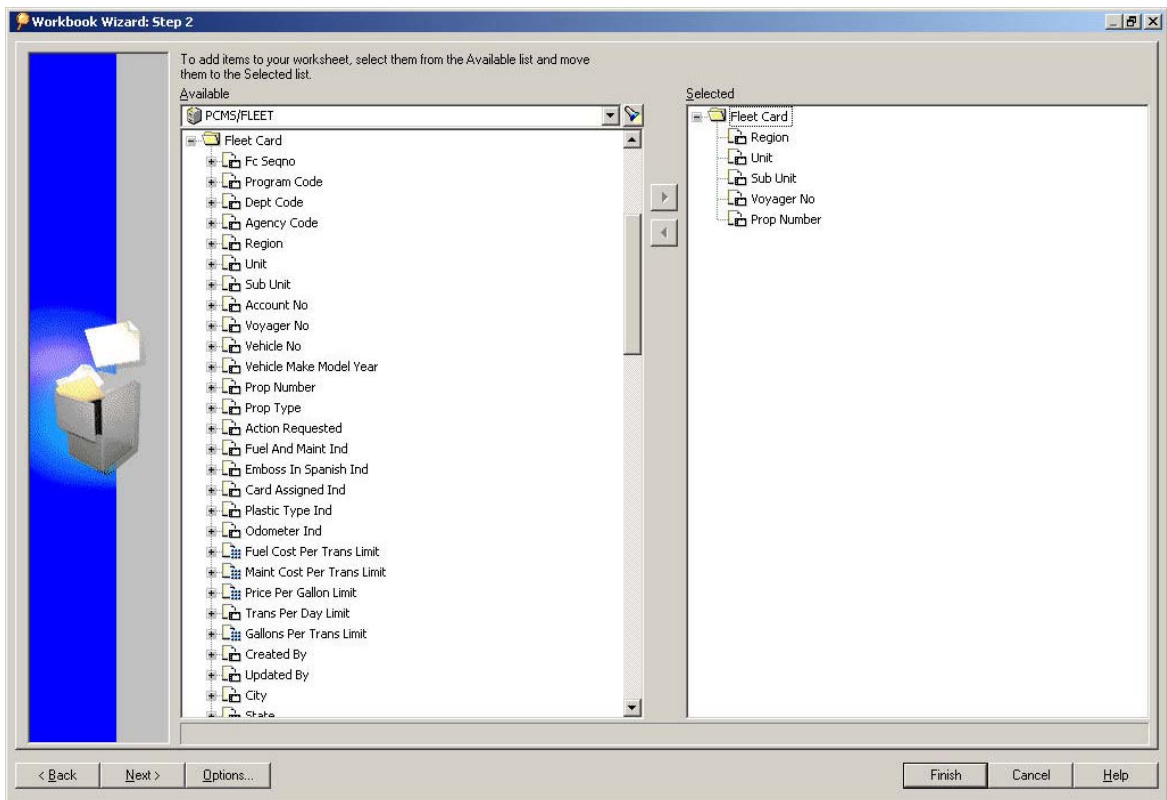


Figure 2-7

Click **Next >** to accept your item selections, and proceed to the next Workbook Wizard screen (Figure 2-8).

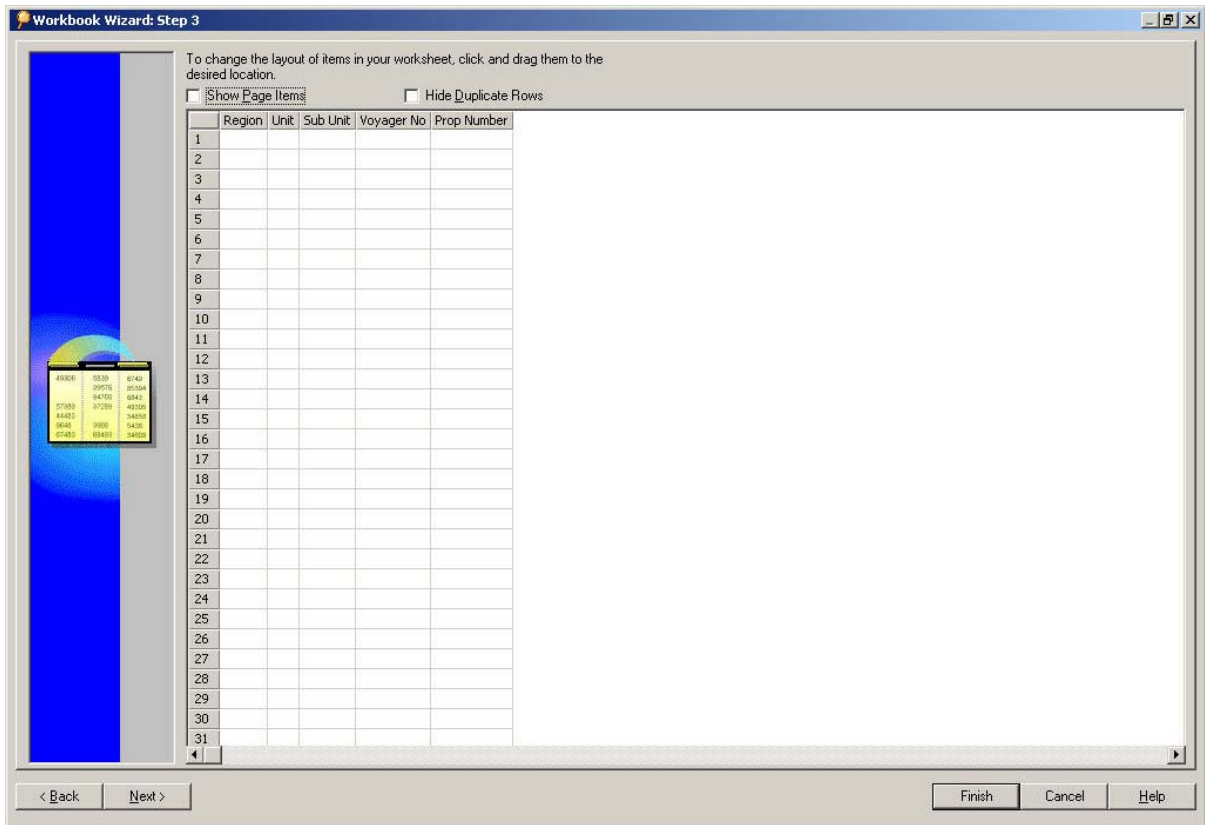


Figure 2-8

Step 3. Now, customize your data display, using the drag-and-drop method, to move *Prop No* to the first or leftmost column of your table. When your display is modified, click **Next >** to proceed to the next Workbook Wizard screen.

Prop Number	Region	Unit	Sub Unit	Voyager No

Figure 2-9

Step 4. This next step in the Workbook Wizard provides the opportunity to create conditions for your query. This is a critical step, which enables Discoverer users to minimize the size of their results set to a manageable level. Failure to set limiting conditions on a query could easily return a data result set numbering thousands of rows, or even more. Moreover, Oracle may *timeout* during a lengthy query, resulting in no data at all. Limiting your queries, at a minimum to a specific *Region* and *Unit* will likely preclude the return of a large, unwieldy results sets or failure due to *timeout*.

Click on **View Conditions for:** for the drop-down list as shown in Figure 2-10 below, and select *Region*.

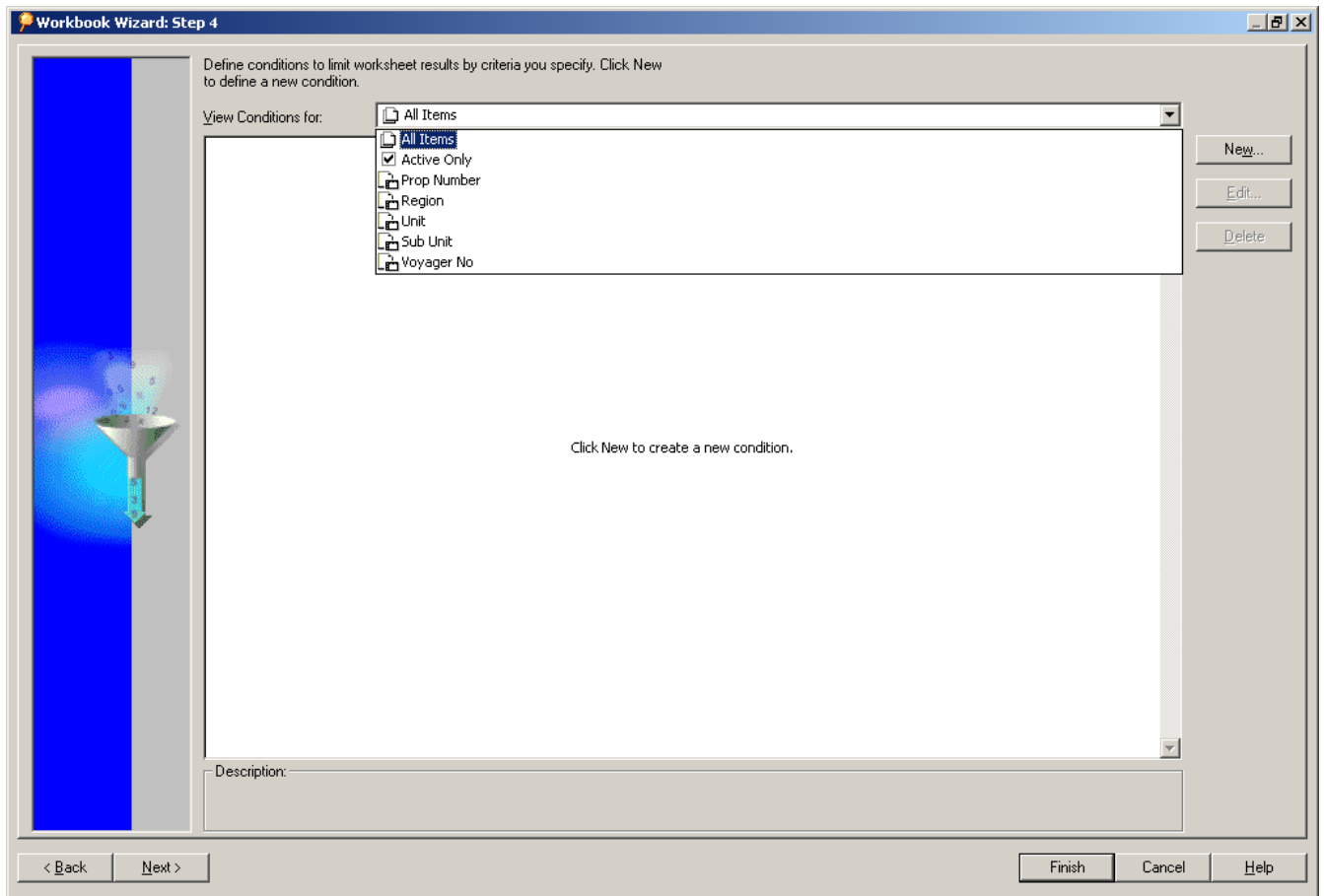


Figure 2-10

Next, click , and the New Condition window in Figure 2-11, shown below, will appear.

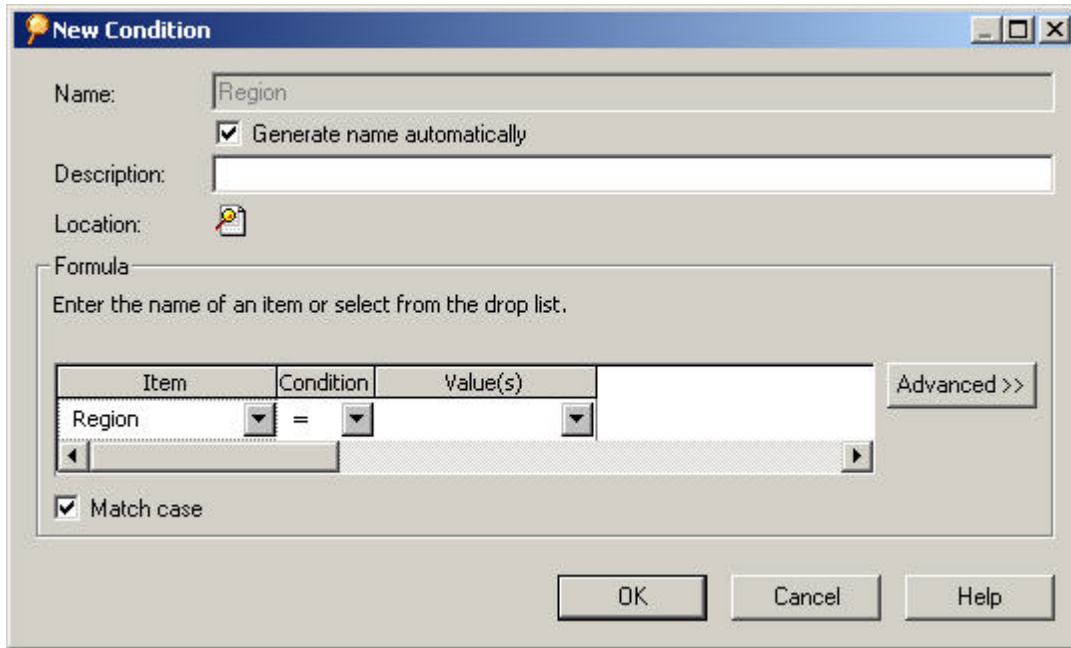


Figure 2-11

The *Condition* field is always an equal sign (=) by default. If you need a different conditional operator when creating a new condition, click in the *Condition* field.

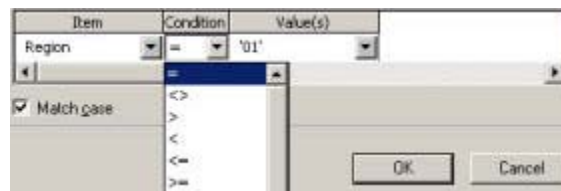


Figure 2-12

Enter a *Region* number in the *Value(s)* field, enclosed in single quotes, like the example shown in Figure 2-12, and click .

Using the same process, enter a *Unit* number. If you support multiple Sub Units, you may choose to set a *Sub Unit* condition as well. Note that as you create conditions for your query, they appear in the Workbook Wizard window. When you've completed the conditions required for your query, click .

Congratulations, you successfully created a simple table-format report using Oracle Discoverer. Your results set should look similar to that shown in Figure 2-13 below. Note the column order, which you altered in Step 3 of the Workbook Wizard workflow process. Also, the *Voyager No* column has been truncated for security.

	Prop Number	Region	Unit	Sub Unit	Voy. #
1	A258048	01	05	00000	179313
2	A262323	01	05	00000	179339
3	A262329	01	05	00000	179303
4	A262321	01	05	00000	179303
5	A272341	01	05	00000	179304
6	A262324	01	05	00000	179303
7	A278970	01	05	00000	179305
8	A278971	01	05	00000	179305
9	A238895	01	05	00000	179301
10	A238140	01	05	00000	179301
11	A278969	01	05	00000	179305
12	A238163	01	05	00000	179301
13	A238117	01	05	00000	179301
14	A186592	01	05	00000	179300
15	A186593	01	05	00000	179300
16	A186596	01	05	00000	179300
17	A186600	01	05	00000	179300
18	A238169	01	05	00000	179301
19	A186598	01	05	00000	179300
20	A110826	01	05	00000	179300
21	A251845	01	05	00000	179302
22	A279038	01	05	00000	179305
23	A251338	01	05	00000	179307
24	A279039	01	05	00000	179305
25	A229427	01	05	00000	179300
26	A251095	01	05	00000	179307
27	A186595	01	05	00000	179300
28	A252301	01	05	00000	179302
29	A1770031	01	05	00000	179305

Figure 2-13

If your query produced more than 100 rows of data, only the first 100 rows will be displayed. Immediately below row 100, you will see the following:

99	A279042	01	05	00000	179305
100	A251843	01	05	00000	179302
▼ Click to retrieve next 100 rows.					

Figure 2-14



Click on  to view additional data in increments of 100 rows. If you need the total number of rows returned, from the Tool Bar (Figure 2-15) at the top of the screen., click on *Sheet > Count All Rows*.



Figure 2-15

Discoverer will provide a count of the number of rows and present the result as shown in Figure 2-16 below. Click  to close this window.

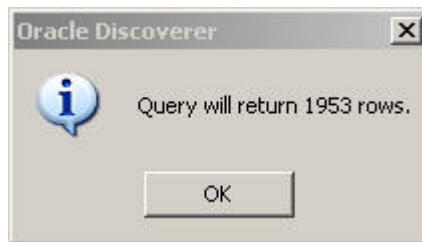


Figure 2-16

If you want all your rows of data to be displayed, from the Tool Bar, click on *Sheet > Retrieve All Rows*, and all data for your query will be displayed.

Finally, it's time to save your work. Click on . Discoverer provides two (2) alternatives for saving your Workbooks; (1) to a computer accessible via your workstation, or (2) the database itself. See Figures 2-17.

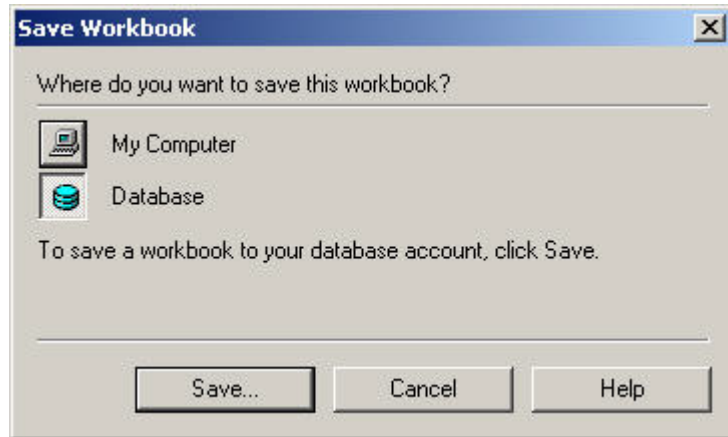


Figure 2-17

Click on or , and you will see one of the following windows (Figure 2-18 or 2-19) appear:

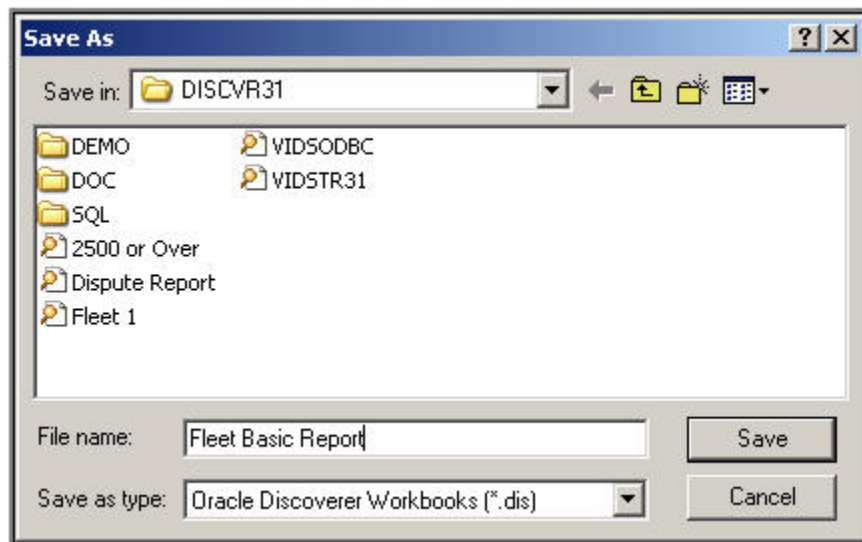


Figure 2-18

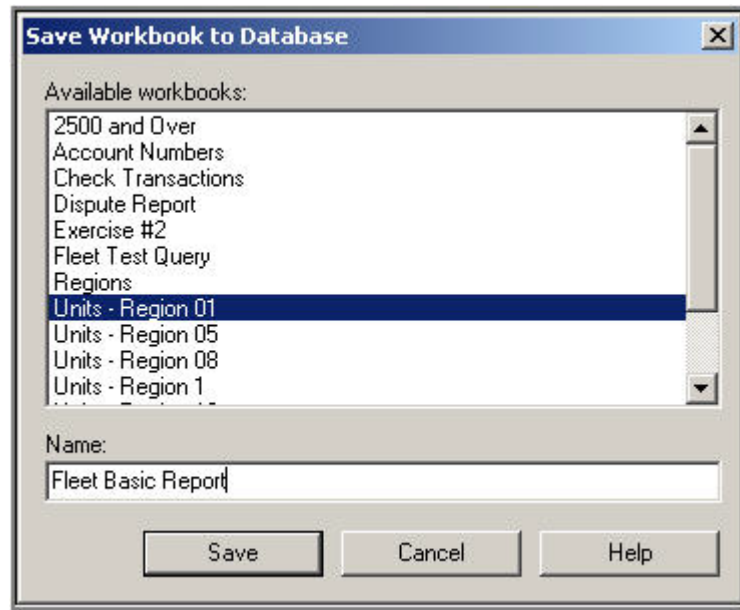


Figure 2-19

Enter *Fleet Basic Report* in the *File Name* field and click on  .

Summary. Creating a query and a report using the Workbook Wizard is simple, easy and quick. Knowing your data and how to define your query to get the data you need is the challenge. In this lesson/exercise, you created a simple report to retrieve Voyager Numbers for a Specific Region and Unit. In the next lesson/exercise, you will create a report to display information on Fleet User Messages.



Exercise 3: *Creating a Message Report*

Lesson Description

In Lesson 3, participants will create a report containing data elements from three (3) different folders (*Message*, *Credit Card*, and *Fleet Card*) providing information on PCMS/Fleet User Messages.

Training Objectives

At the conclusion of this lesson, Agency Fleet Headquarters Coordinators and Local Fleet Program Coordinators will be able to:

1. Develop complex queries from multiple folders.
2. Format raw results into properly sized columns.

Methodology

This lesson will be delivered as an Instructor-led exercise.

References. None.

Enclosures. None.

Preparation. Using your Fleet Username, log on to Discoverer



Figure 3-1

Creating the Basic Query / Report

Step 1. At the initial Workbook Wizard page, select *Create a New Workbook* and *Table*, and click

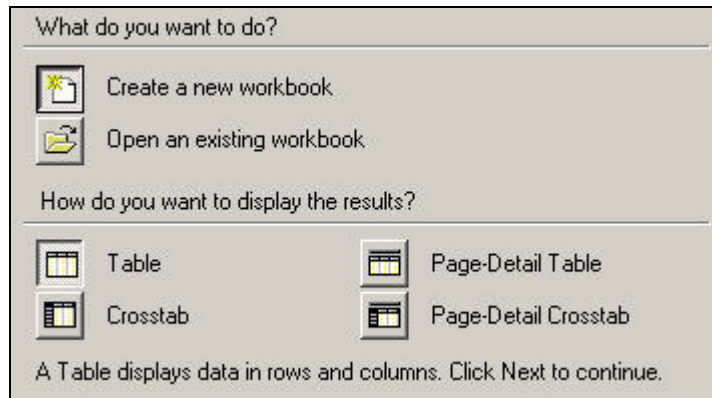
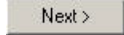


Figure 3-2



Step 2. Next, open the *Account Message* folder from the *Available* column on the left, by clicking on the .



Figure 3-3

Select the following fields:

1. *Region*
2. *Unit*
3. *Sub Unit*
4. *Account Number*
5. *Message*
6. *Message Status*
7. *Message Date*
8. *Comments*
9. *Last Updated*

Select and expand the *Credit Card* folder from the *Available* column by clicking on . Select *Cardholder/Prop Number* and *Voyager Number*.

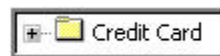


Figure 3-4


Then, select and expand the *Fleet Card* folder from the *Available* column by clicking on . Select *Action Requested* and *PCMS User ID*.



Figure 3-5

When these actions are completed, your *Selected* column on the right-hand side of the paged should appear like Figure 3-6 below. If yes, click to proceed.

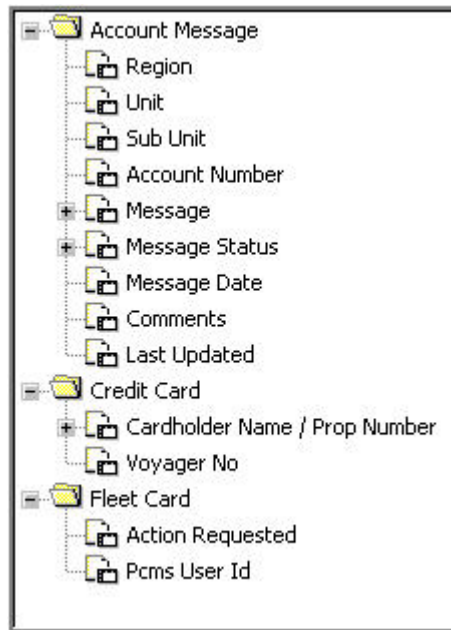


Figure 3-6


Step 3. No customization of this report is required yet. First we want to ensure the query we’re building returns the data necessary to complete the report, so click and proceed to the next Workbook Wizard page.

Step 4. To set the conditions for your query/report, click the next to *All Items*. You should see a window containing each of the fields selected in Workbook Wizard Step 2, shown below in Figure 3-7.



Figure 3-7

Depending on the permissions granted to your Username, you may want to set conditions for *Region*, *Unit* and *Sub Unit*, as done in Lesson 2.

Your query/report is ready to run. Click on  and your report will appear.

	g	r	b	U	Unit Num	Message	Message Date
▶ 1	0	0	0	0	0000358	Purchase made on Holiday purchase date	15-Sep-1999 10:0
▶ 2	0	0	0	0	0000348	Purchase made on Holiday purchase date	16-Sep-1999 10:1
▶ 3	0	0	0	0	0000361	Purchase made on Holiday purchase date	16-Sep-1999 10:1
▶ 4	0	0	0	0	0000339	Profile Accounting changed more than twic	04-Oct-1999 10:4
▶ 5	0	0	0	0	0000339	Profile Accounting changed more than twic	04-Oct-1999 10:4
▶ 6	0	0	0	0	0000340	Profile Accounting changed more than twic	04-Oct-1999 10:4

Figure 3-8

Columns of the initial results table will likely appear truncated as in Figure 3-8 above. In order to re-size the columns, click on the blank (gray) cell in the upper left-hand corner of the table. This will select the entire table for an action, highlighting all items in the table blue. See Figure 3-9 below.

	g	r	b	U	Unit Num	Message	Message Date
▶ 1	0	0	0	0	0000358	Purchase made on Holiday purchase date	15-Sep-1999 10:0
▶ 2	0	0	0	0	0000348	Purchase made on Holiday purchase date	16-Sep-1999 10:1
▶ 3	0	0	0	0	0000361	Purchase made on Holiday purchase date	16-Sep-1999 10:1
▶ 4	0	0	0	0	0000339	Profile Accounting changed more than twic	04-Oct-1999 10:4
▶ 5	0	0	0	0	0000339	Profile Accounting changed more than twic	04-Oct-1999 10:4

Figure 3-9

Now, move to the tool bar at the top of your screen, and click on *Format*, *Columns* and *Auto Size*. (See Figure 3-10.) This action will adjust each column to display complete labels and data strings.

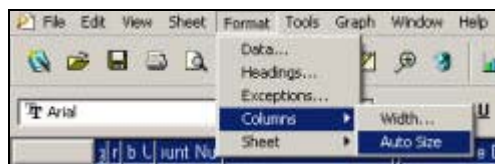


Figure 3-10

Your results set table should now appear similar to Figure 3-11 below. The *Account Number* column has been deliberately compressed for security. Use the horizontal scroll bar at the bottom of the screen to view the *Message Status*, *Message Date*, *Comments* and *Last Updated* fields. In later lesson/exercises, you'll learn to hide columns of unnecessary, redundant data, and alter the *Table Layout* and column format to provide a more user-friendly display.

	Region	Unit	Sub Unit	Acct No	Message
1	01	05	00000	00003584	Purchase made on Holiday purchase date is: 04-JUL-199 merchant name is: ROCKCREEK CONVENIENCE017
2	01	05	00000	00003465	Purchase made on Holiday purchase date is: 04-JUL-199 merchant name is: SUNSET MART #9 013
3	01	05	00000	00003617	Purchase made on Holiday purchase date is: 04-JUL-199 merchant name is: SUNSET MART #9 013
4	01	05	00000	00003399	Profile Accounting changed more than twice a month
5	01	05	00000	00003399	Profile Accounting changed more than twice a month
6	01	05	00000	00003401	Profile Accounting changed more than twice a month
7	01	05	00000	00003404	Profile Accounting changed more than twice a month
8	01	05	00000	00003405	Profile Accounting changed more than twice a month
9	01	05	00000	00003406	Profile Accounting changed more than twice a month
10	01	05	00000	00003408	Profile Accounting changed more than twice a month
11	01	05	00000	00003409	Profile Accounting changed more than twice a month
12	01	05	00000	00003425	Profile Accounting changed more than twice a month
13	01	05	00000	00003430	Profile Accounting changed more than twice a month
14	01	05	00000	00003432	Profile Accounting changed more than twice a month
15	01	05	00000	00003432	Profile Accounting changed more than twice a month
16	01	05	00000	00003435	Profile Accounting changed more than twice a month
17	01	05	00000	00003440	Profile Accounting changed more than twice a month
18	01	05	00000	00003440	Profile Accounting changed more than twice a month
19	01	05	00000	00003442	Profile Accounting changed more than twice a month
20	01	05	00000	00003443	Profile Accounting changed more than twice a month
21	01	05	00000	00003444	Profile Accounting changed more than twice a month
22	01	05	00000	00003445	Profile Accounting changed more than twice a month
23	01	05	00000	00003447	Profile Accounting changed more than twice a month
24	01	05	00000	00003447	Profile Accounting changed more than twice a month
25	01	05	00000	00003447	Profile Accounting changed more than twice a month
26	01	05	00000	00003450	Profile Accounting changed more than twice a month
27	01	05	00000	00003450	Profile Accounting changed more than twice a month
28	01	05	00000	00003452	Profile Accounting changed more than twice a month
29	01	05	00000	00003450	Profile Accounting changed more than twice a month

Figure 3-11


Finally, save your report by clicking on  , selecting a computer or the database for storing your report (Figure 3-12), and saving this report as *Message Report* (Figure 3-13).



Figure 3-12

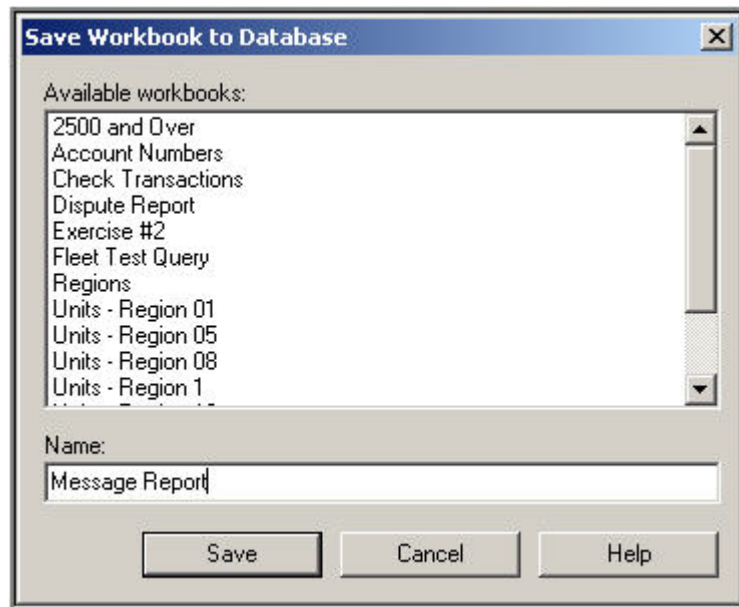


Figure 3-13

Summary. In this lesson/exercise, you successfully created a Messages Report from data elements contained in multiple Discoverer folders, then re-sized your report display or printing. In the next lesson/exercise, you'll learn to add group sorts to your report, and edit your table layout using the *Show Page Items* feature.