



## Exercise 4: *Group Sorts & Layout Edits*

### Lesson Description

Lesson 4 is an introduction to Sorts and editing the Layout of reports. This lesson begins with the creation of a report listing *Prop Number* with the associated *Voyager No.*

### Training Objectives

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

1. Use Group Sorts.
2. Order data in ascending or descending order.
3. Change/Edit Table Layout.

### Methodology

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

References. None.

Enclosures. None.

**Preparation.** Using your Fleet Username, log on to Discoverer

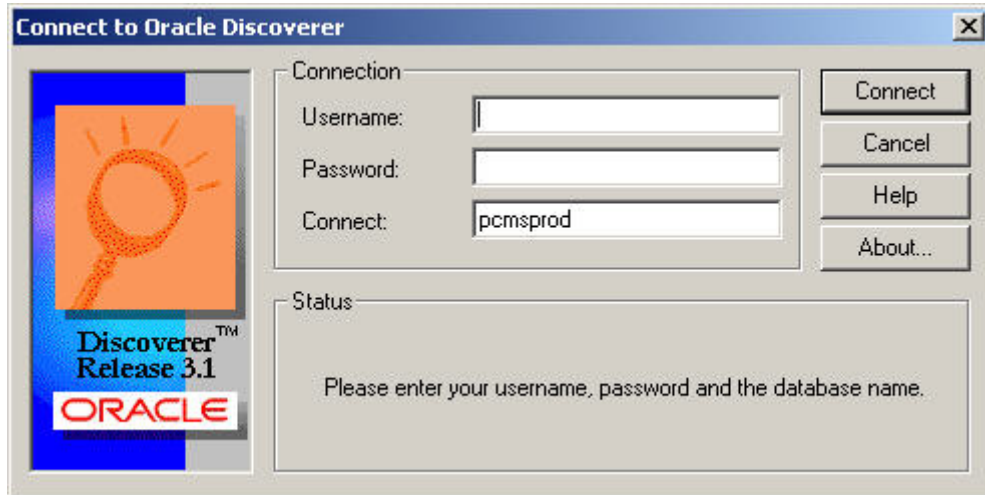


Figure 4-1

## Creating the Basic Query / Report

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

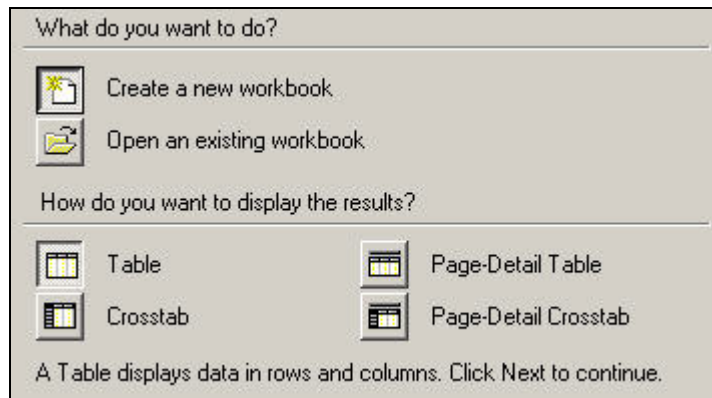
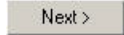



Figure 4-2


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

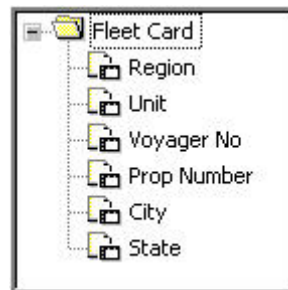


**Figure 4-3**


Select the following fields:

1. *Region*
2. *Unit*
3. *Prop Number*
4. *Voyager No*
5. *City*
6. *State*

When this action is completed, your *Selected* column on the right-hand side of the paged should appear like Figure 4-4 below. If yes, click  to proceed.



**Figure 4-4**

**Step 3.** If you'd like to change the order of the columns in this report, drag-and-drop them into the desired position or order, and click .

**Step 4.** Depending on the permissions granted to your Username, you may choose to set conditions for *Region* and *Unit*, as done in Lesson 2, and then click .

**Step 5.** At this stage of the Workbook Wizard (See Figure 4-5), you have the opportunity to create *Sorts*, and also to hide unnecessary, redundant columns of data from your report

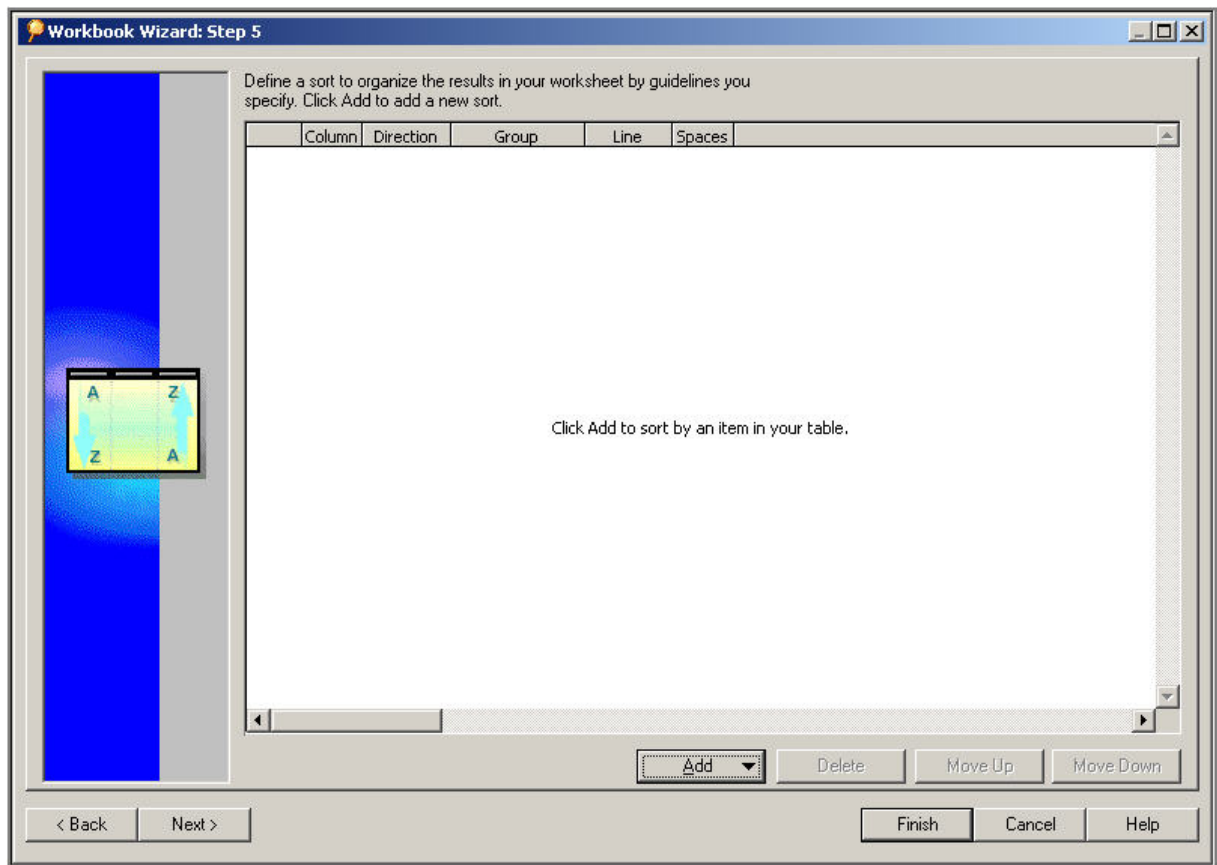


Figure 4-5



Next, click , which opens a drop-down list (See Figure 4-6) displaying each of the columns included in your report.





Figure 4-6

Select *City*, and your display will show the item in Figure 4-7 below. Click on  under *Group*, and select *Group Sort*.


	Column	Direction	Group	Line	Spaces
1	City	Lo to Hi	None	---	---

Figure 4-7

Repeat this process for *State*. Then select *Prop Number*, and change *Direction* from *Lo to Hi* to *Hi to Lo* by clicking  or . When these actions are completed, your Sorts window should appear similar to Figure 4-8 below.

	Column	Direction	Group	Line	Spaces
1	City	Lo to Hi	Group Sort	1	0
2	State	Lo to Hi	Group Sort	1	0
3	Prop Number	Hi to Lo	None	---	---


Figure 4-8

Your query/report is ready to run. Click on  and your report will appear. Columns of the initial results table will likely appear truncated. Re-size the columns so your results set table appears similar to Figure 4-9 below.

Note that *Prop Number* is listed in descending order, and that *City* and *State* names are displayed only when there is a change in those values from one record to the next. The *Voyager No* column has been deliberately compressed for security.

	Region	Unit	Voy. #	Prop Number	City	State
1	94	19	179330	A272887	SIoux CITY	IA
2	94	19	179330	A272880		
3	94	19	179330	A272876		
4	94	19	179330	A272875		
5	94	19	179330	A272874		
6	94	19	179330	A272873		
7	94	19	179330	A272854		
8	94	19	179328	A267229		
9	94	19	179328	A264246		
10	94	19	179327	A253163		
11	94	19	179326	A244597		
12	94	19	179326	A244569		
13	30	27	179352	A302554	TAMPA	FL
14	30	27	179352	A302553		
15	30	27	179339	A287639		
16	82	00	179354	A266603	060980113	CA
17	08	12	179344	A289516	2421 WHITHERBEE RD	SC
18	08	12	179344	A289507		
19	08	12	179344	A289506		
20	08	12	179344	A9193	2421 WITHERBEE RD	SC

Figure 4-9

Searching this report by *City* can be made even easier, by changing the *Table Layout*. Click on , which is the *Edit Sheet* icon, to open the *Edit Sheet* page. See Figure 4-10. Alternatively, you can go to the tool bar at the top of the screen, and select *Sheet > Edit Sheet...*

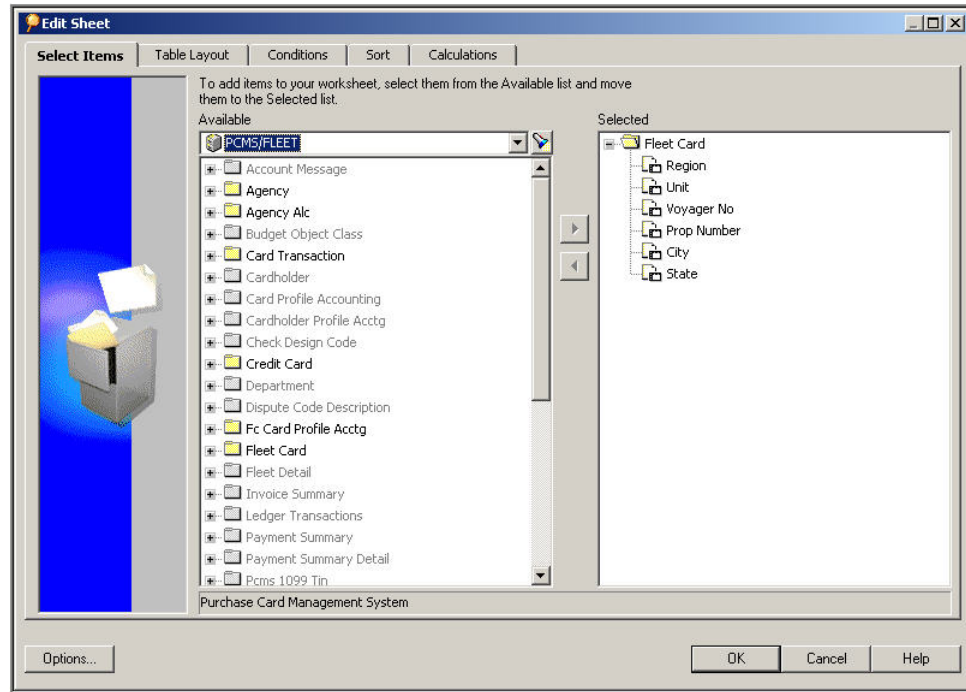


Figure 4-10

Next, click on tab labeled *Table Layout*. See Figure 4-11.

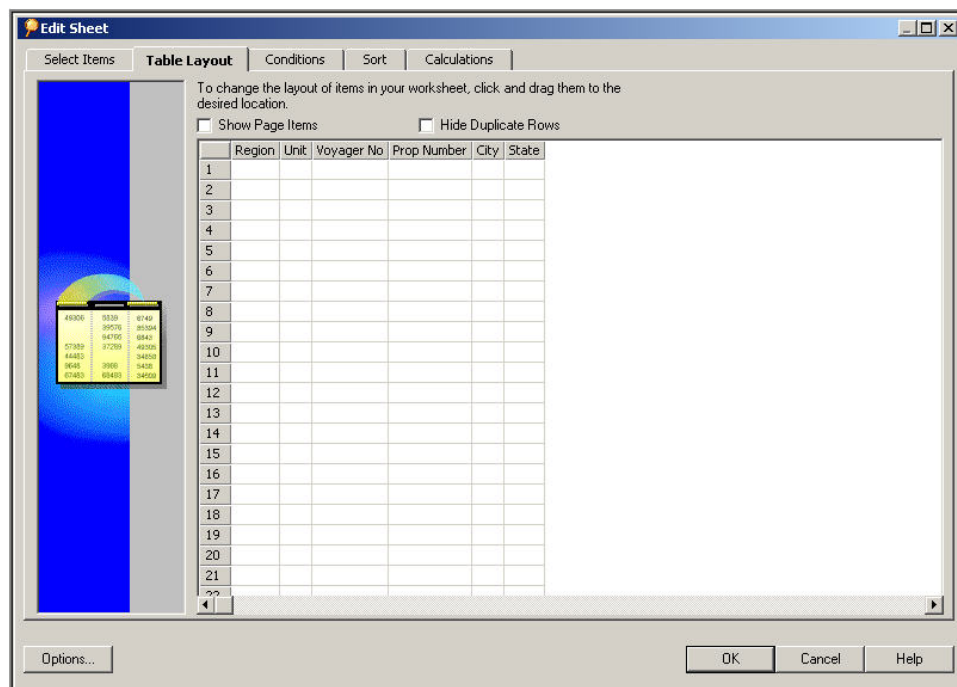


Figure 4-11

Click/Select the *Show Page Items* checkbox (Figure 4-12), which will open a new *Page Items* window (Figure 4-13).



Figure 4-12

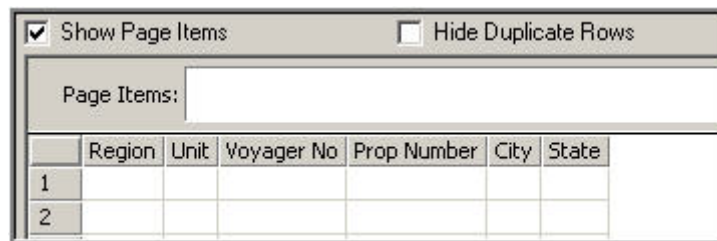


Figure 4-13

Drag-and-drop the column-heading label *City* from the table display into the *Page Items* window. Your display should appear similar to the window in Figure 4-14 below.

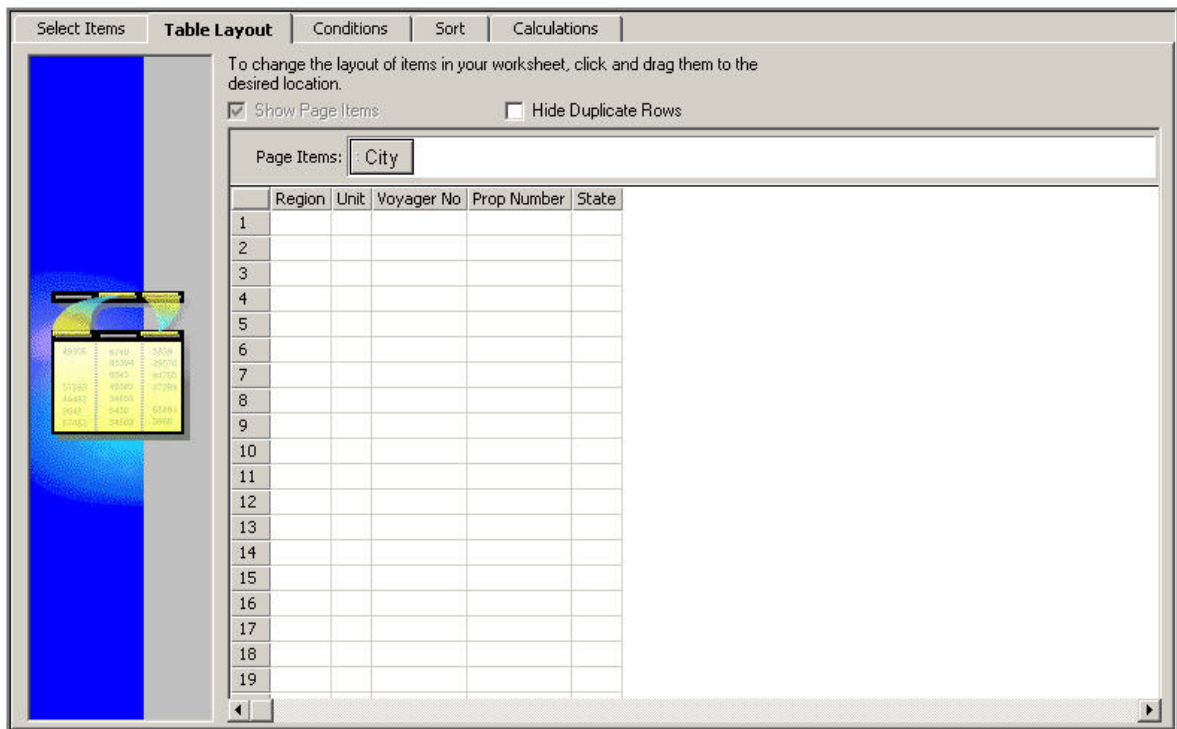

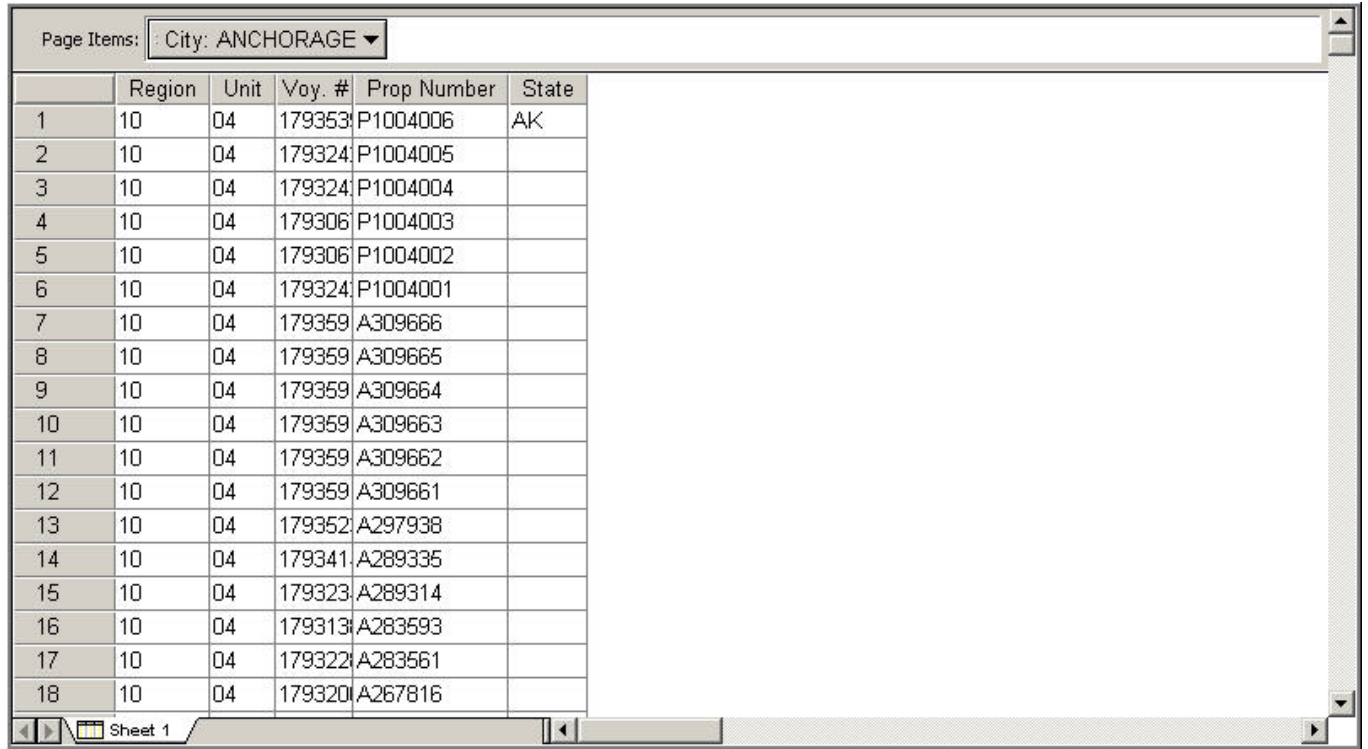


Figure 4-14



Click on , and your report will be altered to appear similar to Figure 4-15 below, with a drop-down menu for *City* located in the *Page Items* field.



	Region	Unit	Voy. #	Prop Number	State
1	10	04	179353	P1004006	AK
2	10	04	179324	P1004005	
3	10	04	179324	P1004004	
4	10	04	179306	P1004003	
5	10	04	179306	P1004002	
6	10	04	179324	P1004001	
7	10	04	179359	A309666	
8	10	04	179359	A309665	
9	10	04	179359	A309664	
10	10	04	179359	A309663	
11	10	04	179359	A309662	
12	10	04	179359	A309661	
13	10	04	179352	A297938	
14	10	04	179341	A289335	
15	10	04	179323	A289314	
16	10	04	179313	A283593	
17	10	04	179322	A283561	
18	10	04	179320	A267816	

Figure 4-15

Now, your report is configured to sort and display data by *City*. Click on the *City* icon in the *Page Items* window, and the *Page* menu shown in Figure 4-16 below will appear.

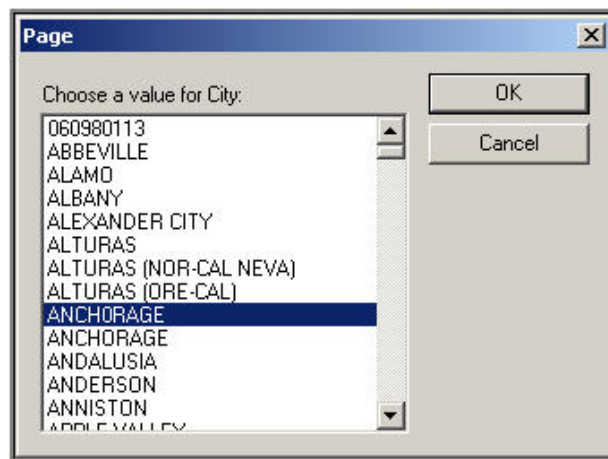




Figure 4-16

Just select a *City*, and click  to view *City*-specific data.

Finally, save your report by clicking on , selecting a computer or the database for storing your report (Figure 4-17), and saving this report as *Prop-Voyager Numbers Report* (Figure 4-18).

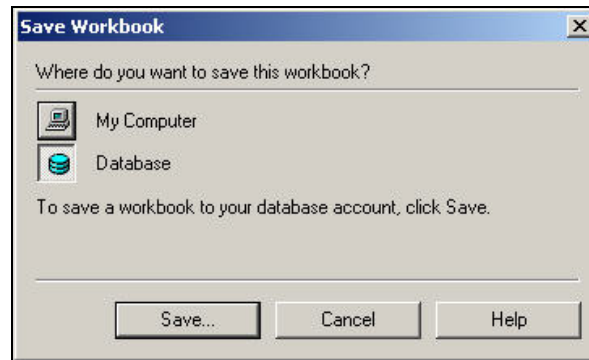


Figure 4-17

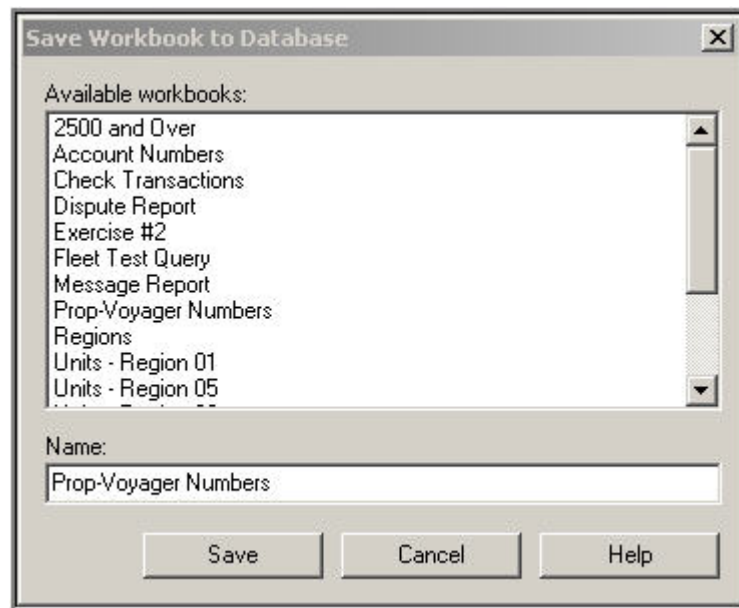


Figure 4-18



**Summary.** In this lesson/exercise, you successfully created a Prop-Voyager Numbers Report from data elements contained in *Fleet Card* folder. *Group Sorts* were used to group data by *City* and *State*, and to order *Prop Number* data in descending order. Finally, the *Table Layout* was altered to facilitate the display of data by *City*.

In the next lesson/exercise, you'll learn to use the *Crosstab* format, and present your resulting report as a *Graph*.



## Exercise 5: *Crosstab Layouts & Graphs*

### Lesson Description

Lesson 5 introduces the use of Crosstab Layouts and Graphs for presentation of data. This lesson begins with the creation of a report displaying *Total Fuel Sales Amount by Product Code*.

### Training Objectives

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

1. Create a Crosstab-format report.
2. Create a Bar Graph-format report from a Crosstab report.

### 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 5-1

## Creating the Basic Query / Report

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

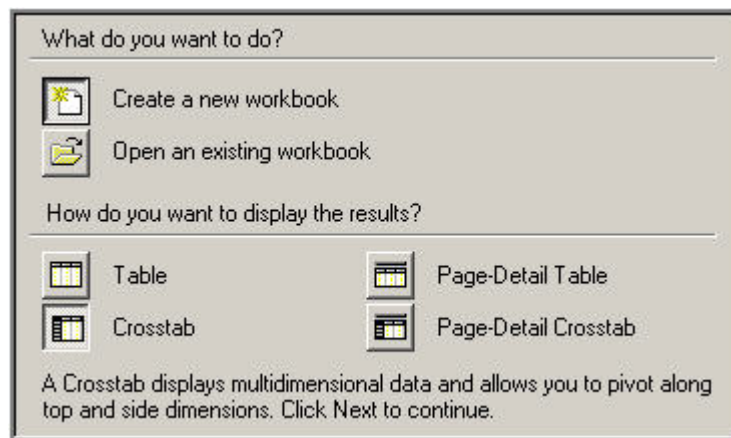
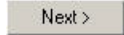


Figure 5-2


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





Figure 5-3

Select the *Product Code* and *Fuel Sale Amount* fields. When this action is completed, your *Selected* column on the right-hand side of the paged should appear like Figure 5-4 below.



Figure 5-4

If yes, click  to proceed. You should now see the Oracle Discoverer message shown in Figure 5-5 below. Click , which will take you to Step 3 of the Workbook Wizard.

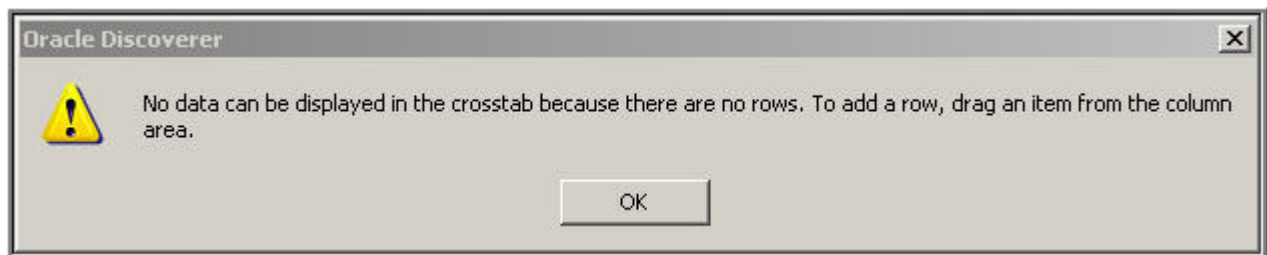


Figure 5-5

**Step 3.** Your Workbook Wizard Step 3 page should appear similar to Figure 5-6.

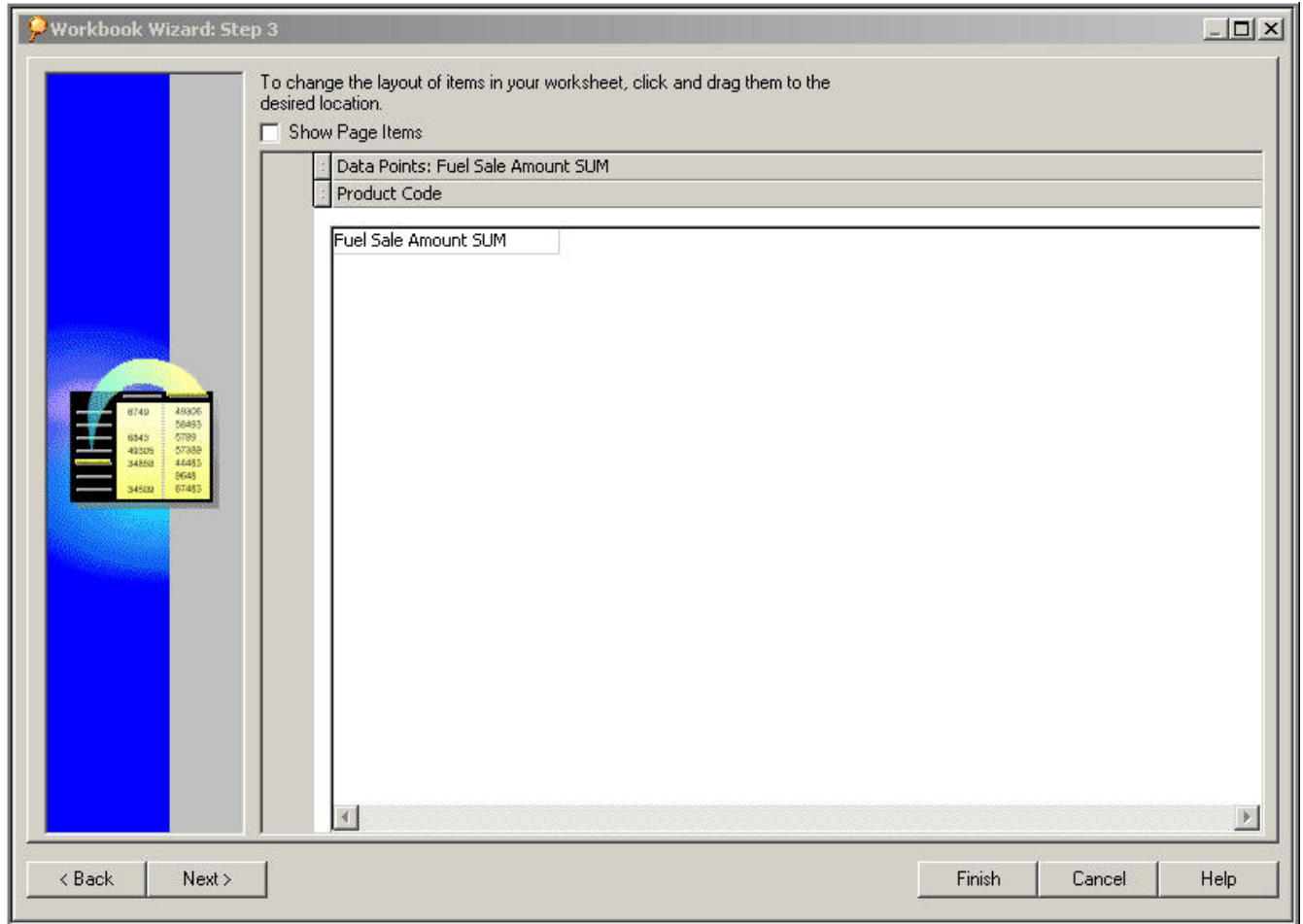


Figure 5-6

At this juncture, you must select which data will be displayed on the X-axis (vertical) and Y-axis (horizontal). Customize your data display by selecting and dragging *Product Code* onto the X- axis (left-hand column). See Figure 5-7.

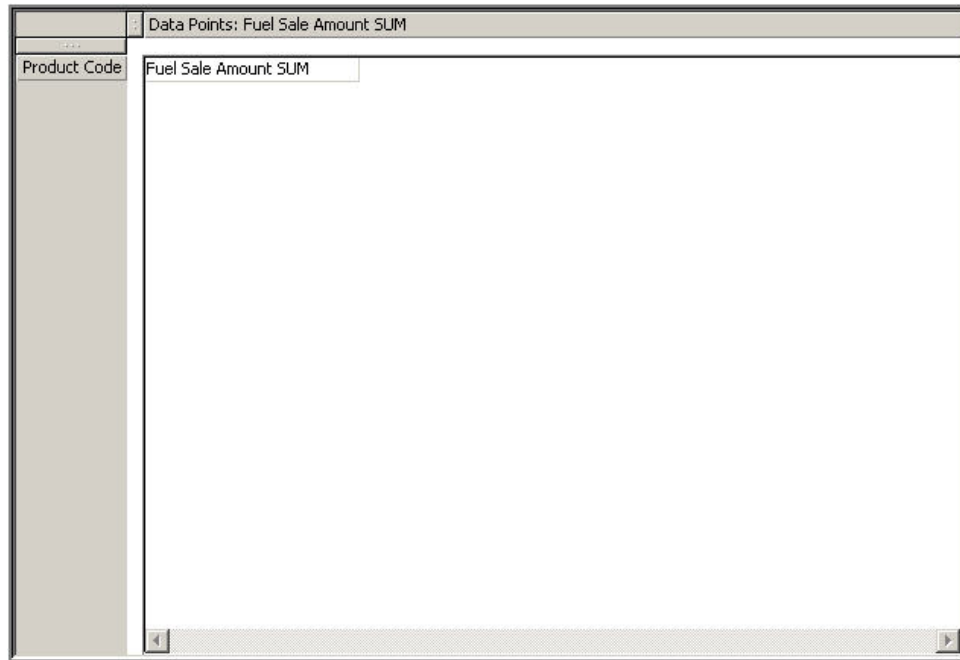


Figure 5-7

Note that *Product Code* now appears over the X- axis. If yes, click  to run your query/report. Depending on the complexity and scope of your query, you may see a *Progress* window similar to Figure 5-8 below.

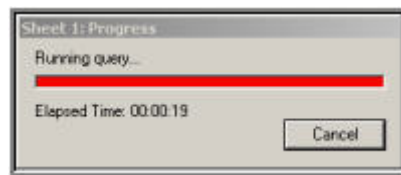



Figure 5-8

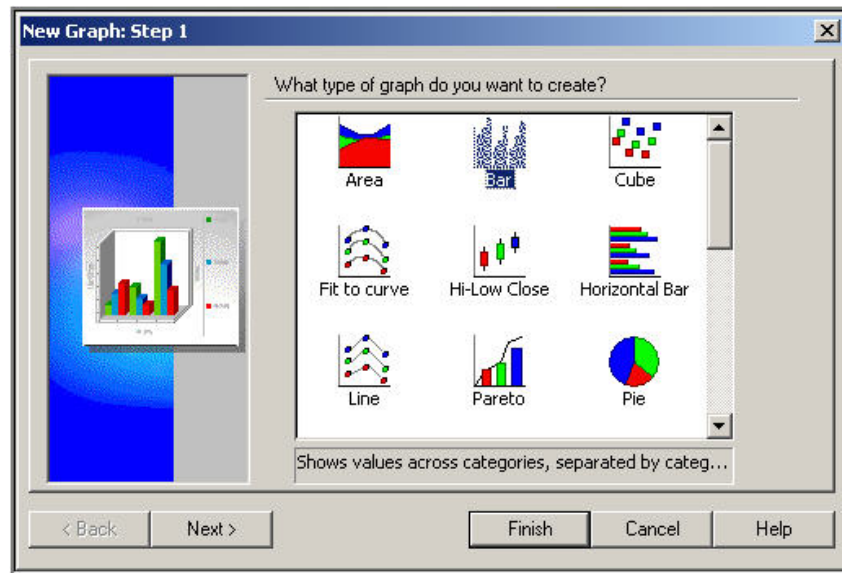


Your initial report results should appear similar to Figure 5-9, as shown below. Note your data display is in a *Crosstab* format, with Product Code in the left-hand column.

	Fuel Sale Amount SUM
0	4285.66
00	49450.55
01	78612642.25
02	216296.83
03	7306917.96
04	9615.28
05	5428220.40
06	266.42
07	27458.39
08	16.25
10	1153.07
11	3284.63
12	8204511.79
13	7954.85
14	49085.42
15	56519.17
16	1037904.89
17	13641.73
18	1319.60
19	26077.30
20	10.00
22	121497.82
23	188.60
24	396.10
25	194.01
26	1060385.02
27	1561461.13
28	77642.26


Figure 5-9

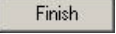
Next, to display your report as a Graph, go to the tool bar and click , or alternatively, select *Graph > New Graph*. The *New Graph: Step 1* window, Figure 5-10, will appear.



**Figure 5-10**

Figure 5-10 depicts selection of a *Bar Graph* format only. Note there are eight additional graph format options visible, and other selections available by moving the vertical scroll bar down.

By clicking , subsequent *New Graph* windows will be displayed providing the opportunity to add additional detail or customization to your graph. These features are intuitive, easy to use, and you are encouraged to explore these capabilities further following the conclusion of this training course.

To continue with this exercise, click  , and view your first graph/report. Your report should appear similar to Figure 5-11 below.

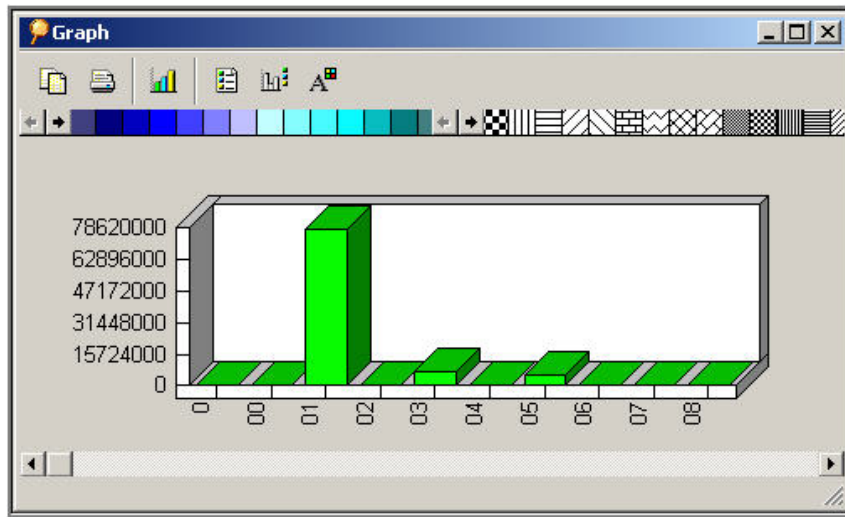



Figure 5-11

Finally, save your report by clicking on  , selecting a computer or the database for storing your report (Figure 5-12), and saving this report as *Crosstab & Graph Report* (Figure 5-13).

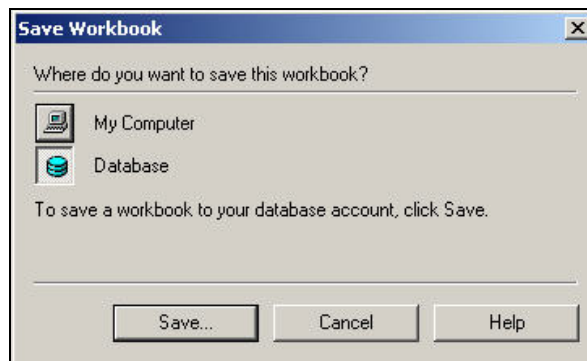


Figure 5-12

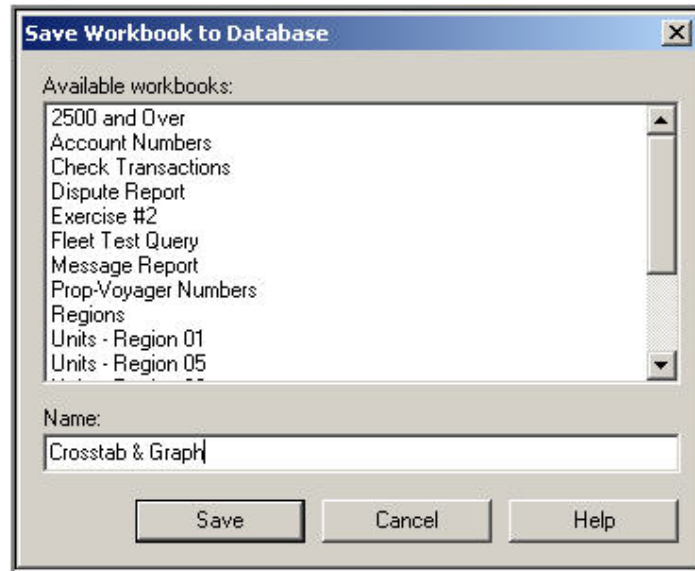


Figure 5-13

**Summary.** In this lesson/exercise, you successfully created a Crosstab-format report from data elements contained in *Fleet Detail* folder. Additionally, you created a graph-format report, permitting the user to analyze *Fuel Sale Amount* by *Product Code*.

In the next lesson/exercise, you'll learn to create a New Condition using a date range, and to edit column headers.



## Exercise 6: *Using Date Ranges*

### Lesson Description

Lesson 6 introduces the use of Date Ranges as a condition for a query/report. Also, as part of this lesson, you'll edit the format of your report to change the headings and other table properties. This lesson begins with the creation of a report displaying fields from the *Card Transaction* folder.

### Training Objectives

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

1. Create a condition using a date range.
2. Reformat report headings.
3. Use the Wrap Text function.

### 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 6-1

## Creating the Basic Query / Report

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

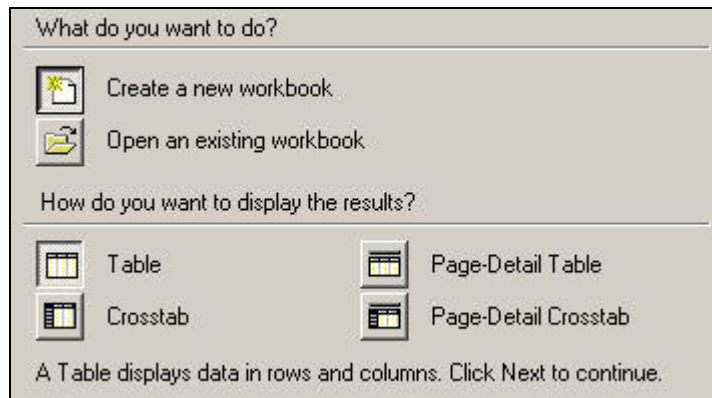
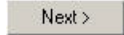



Figure 6-2


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

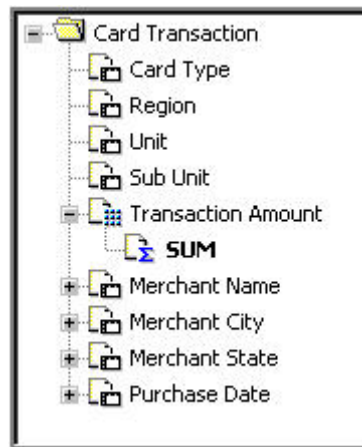


**Figure 6-3**

Select the following fields:

1. *Card Type*
2. *Region*
3. *Unit*
4. *Sub Unit*
5. *Transaction Amount*
6. *Merchant Name*
7. *Merchant City*
8. *Merchant State*
9. *Purchase Date*

When this action is completed, your *Selected* column on the right-hand side of the paged should appear like Figure 6-4 below. If yes, click  to proceed.



**Figure 6-4**

**Step 3.** Leave the column order as is it appears, and click  to proceed to Step 4.


**Step 4.** Open the *All Items* drop-down list shown in Figure 6-5 below by clicking on  .



Figure 6-5

The *View Conditions for:* selection list will appear. See Figure 6-6.

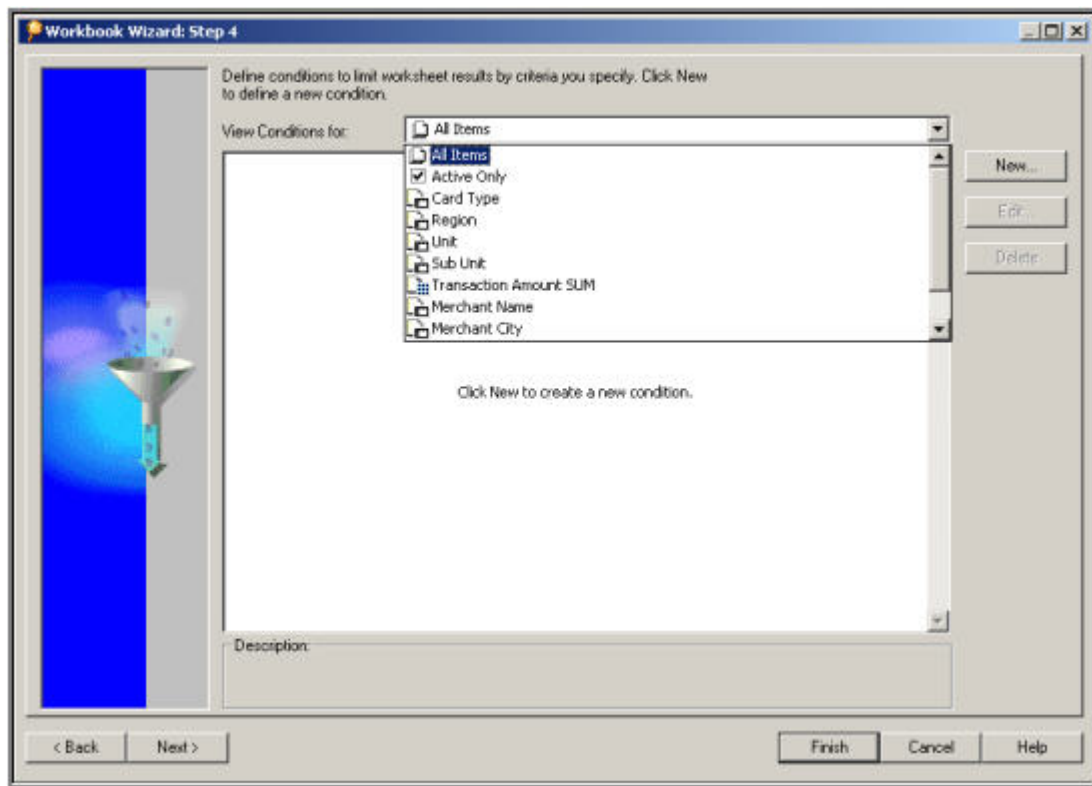



Figure 6-6

Scroll to the bottom of this list, select *Purchase Date*, and click  .



The *New Condition* window, as shown in Figure 6-7 below, will appear.

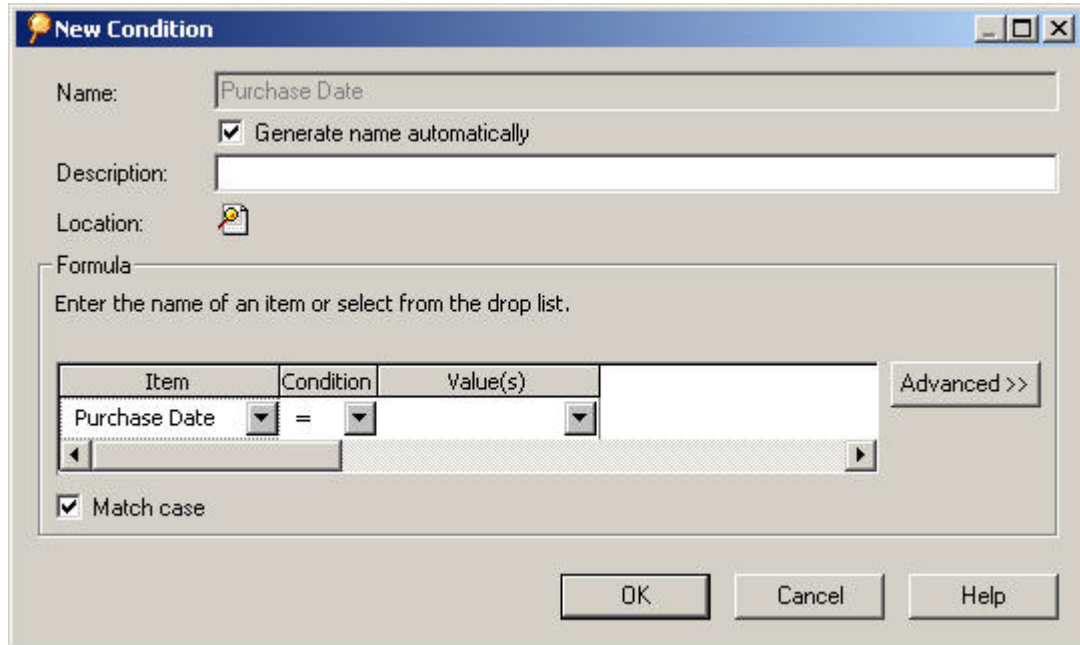



Figure 6-7

Click on  under *Condition* to display a menu of available conditional operators. See Figure 6-8. Select *Between*.

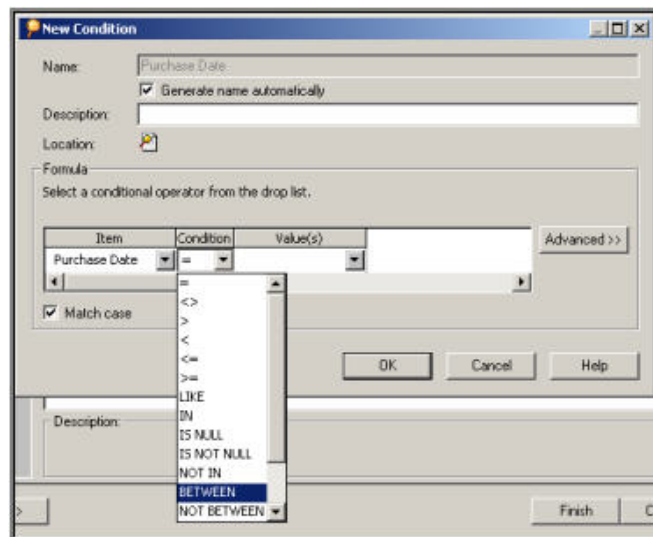


Figure 6-9

Under the *Value(s)* data entry field, enter a date of '01-Mar-2002' in the left field, and a date of '31-May-2002' in the right field. Ensure that you enclose your dates in single quotes, and that your text format follows that shown in Figure 6-10 below.

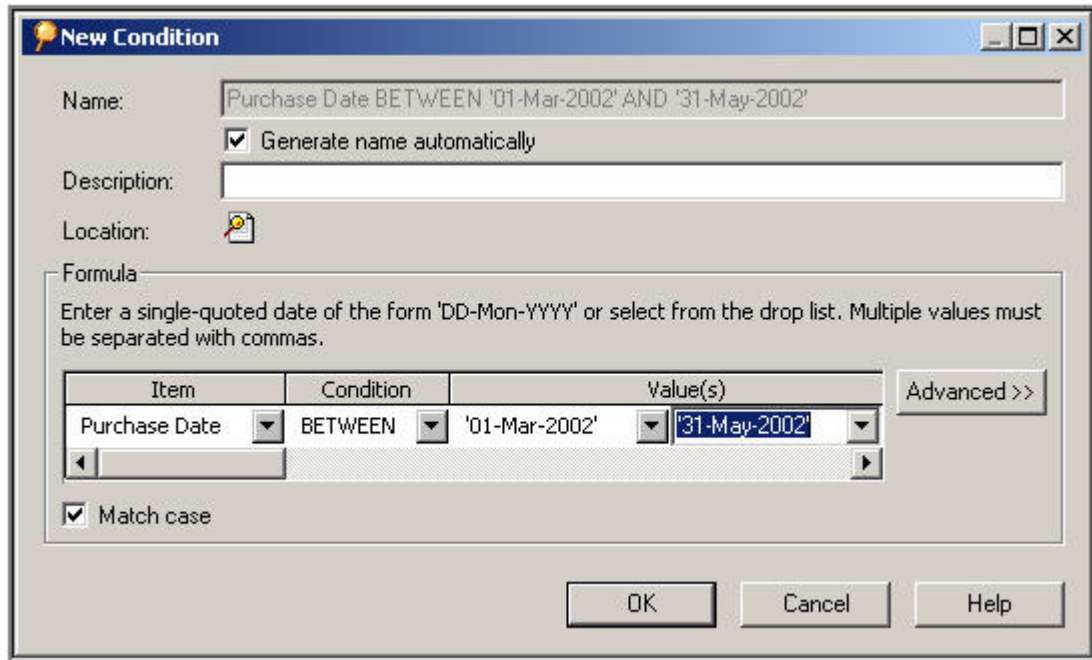


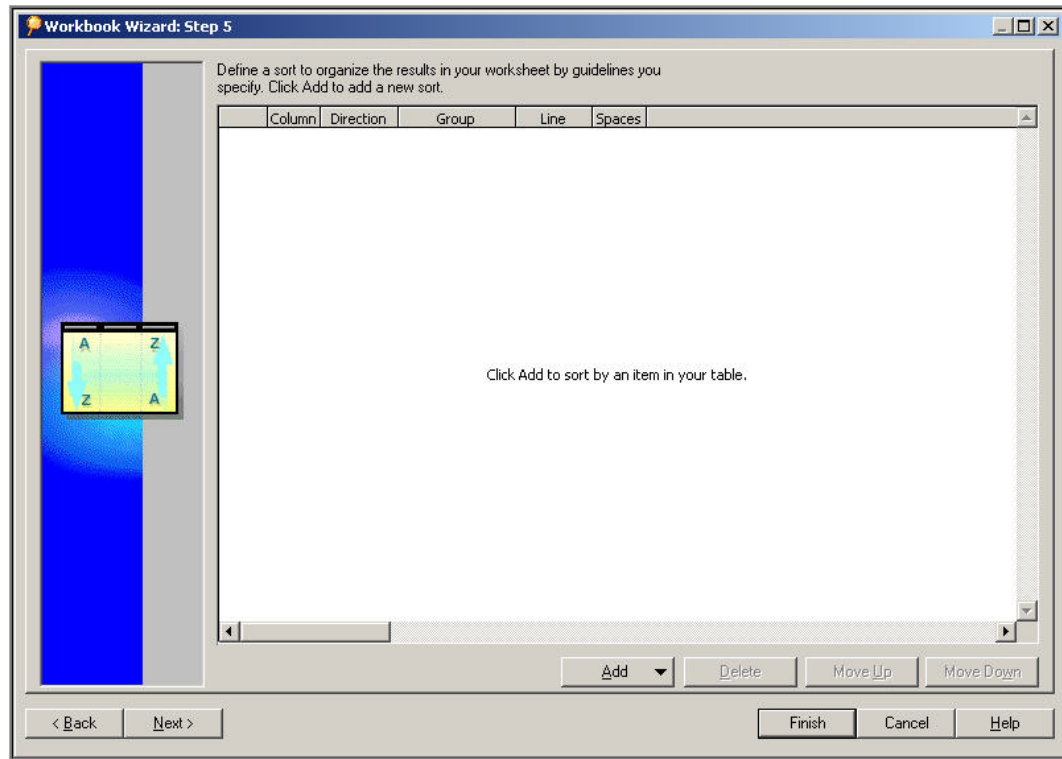



Figure 6-10

When this action is completed, click , which will return you to the Workbook Wizard Step 4 window. Click  to proceed to the next Workbook Wizard window, where you'll add *Sorts* to your query/report.

**Step 5.** The Workbook Wizard Step 5 page is shown in Figure 6-11 below. Here you have the opportunity to add *Group Sorts* to your report.



**Figure 6-11**

Click on , to access a menu of fields available for *Sort* operations. See Figure 6-12.



**Figure 6-12**

Select *Merchant State*, then click  again and select *Unit*. Now you've selected two fields for an action. For Row 1 (*Merchant State*), click on the  under *Group*, and select *Group Sort* from the menu. Repeat this process for Row 2 (*Unit*). Your selections should appear similar to Figure 6-13.

	Column	Direction	Group	Line	Spaces
1	<i>Merchant State</i>	Lo to Hi	Group Sort	1	0
2	<i>Unit</i>	Lo to Hi	Group Sort	1	0

Figure 6-13

Your query is now ready to run. Click  to see your report. When the initial results appear, resize them using the *Format>Column>Auto Size* function at the tool bar. Your report should appear similar to Figure 6-14 below.

	Card Type	Region	Unit	Sub Unit	Transaction Amount SUM	Merchant Name	Merchant City	Merchant State	Purchase Date
1	P	20	02	00000	\$891.74	JOSE CRESPO 0	ARUBA	AA	13-Mar-2002
2	P	20		00000	\$264.11	JOSE CRESPO 0	ARUBA		20-Mar-2002
3	P	20		00000	\$465.94	T.C. S.S TOP CARGO 0	ARUBA		28-Mar-2002
4	P	20		00000	\$361.97	JOSE CRESPO 0	ARUBA		18-Apr-2002
5	P	20		00000	\$812.56	JOSE CRESPO 0	ARUBA		22-May-2002
6	P	03	00	00000	\$2,199.00	AMERICAN CONFERENCE INST	888-224-2480	AB	22-Apr-2002
7	P	17		00000	\$1,286.29	MARGO SUPPLIES LTD	HIGH RIVER		29-May-2002
8	P	05	01	00000	\$332.20	BIOLOGICAL SCIENCES	EDMONTON		30-Apr-2002
9	P	01	02	00000	\$284.90	SAF - T - PAK INC	7804860211		26-Mar-2002
10	P	01		00000	\$284.90	SAF - T - PAK INC	7804860211		04-Apr-2002
11	P	20		00000	\$24.48	ESSO IMP OIL /EDMON TR	AIL/16TH CALG		30-May-2002
12	P	05		00000	\$153.50	WORX ENVIRONMENTAL PROD	CALGARY		09-May-2002
13	P	30	05	00000	\$110.33	PRAXIOM RESEARCH GROUP LT	EDMONTON		25-Mar-2002
14	P	62		00000	\$524.44	BIOLOGICAL SCIENCES	EDMONTON		08-Apr-2002
15	P	03	08	00000	\$387.78	WHAT ON EARTH	EDMONTON		19-Mar-2002
16	P	06	09	00000	\$29.88	TROUT UNLIMITED CANADA	CALGARY		08-May-2002
17	P	70	10	00000	\$1.64	MARGO SUPPLIES	HIGH RIVER		05-Apr-2002
18	P	70		00000	\$131.60	MARGO SUPPLIES LTD	HIGH RIVER		05-Apr-2002
19	P	70	11	00000	\$512.51	MARGO SUPPLIES LTD	HIGH RIVER		25-Apr-2002
20	P	70		00000	\$161.41	MARGO SUPPLIES LTD	HIGH RIVER		07-May-2002
21	P	70		00000	\$206.59	MARGO SUPPLIES LTD	HIGH RIVER		09-May-2002
22	P	70		00000	\$111.35	MARGO SUPPLIES LTD	HIGH RIVER		22-May-2002
23	P	06		00000	\$222.62	COMPUTER CONNECTIONS	RED DEER		12-Apr-2002
24	P	66	12	00000	\$208.30	SAF - T - PAK INC	7804860211		07-Mar-2002
25	P	66		00000	\$862.56	SAF - T - PAK INC	7804860211		15-Mar-2002
26	P	70		00000	\$245.37	MARGO SUPPLIES LTD	HIGH RIVER		13-Mar-2002
27	P	70		00000	\$509.69	MARGO SUPPLIES LTD	HIGH RIVER		16-May-2002
28	P	04	13	00000	\$299.00	AMBUS REGISTRY INC.	CALGARY		18-Mar-2002
29	P	04		00000	\$24.48	TROUT UNLIMITED CANADA	CALGARY		08-May-2002

Figure 6-14

Your report has some lengthy header names, such as *Transaction Amount SUM*, over columns of data that are relatively short. You can alter your header names, and/or format your columns to wrap text. Click on the uppermost left-hand cell (blank & gray) on your report to select the entire table for action. At the toolbar, select *Format>Headings*, and the *Format Heading* window shown in Figure 6-15 will appear.

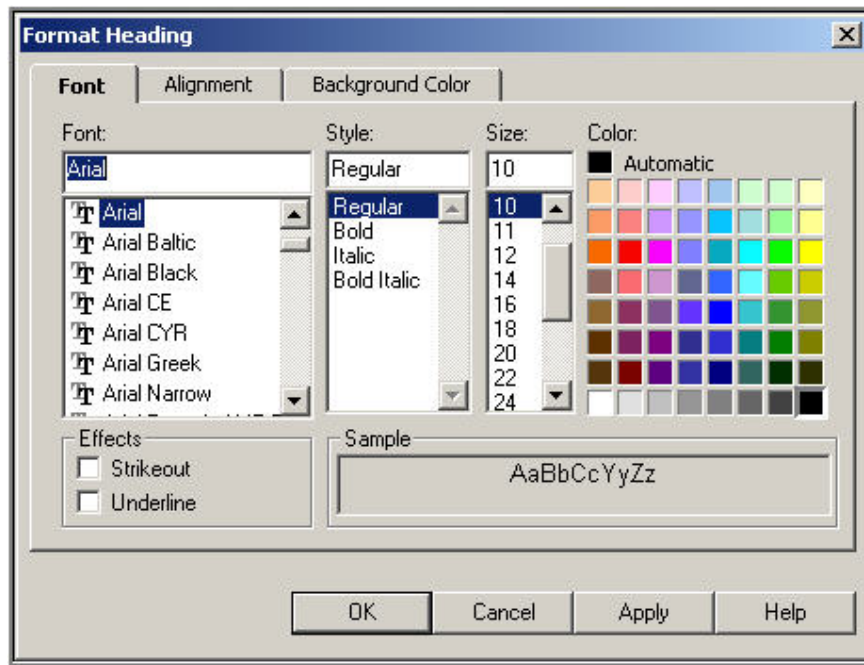
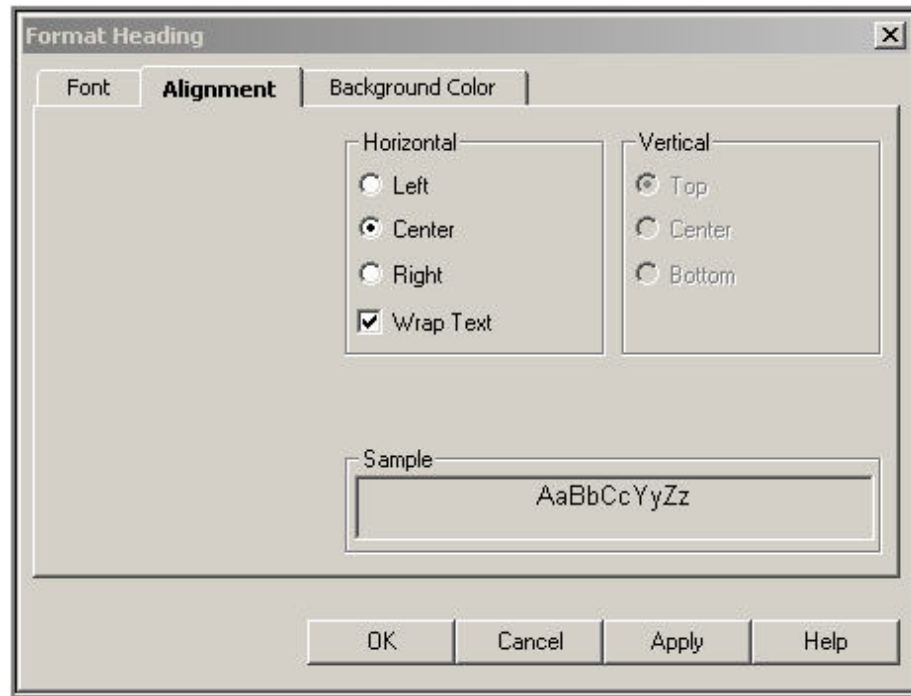


Figure 6-15

Select the *Alignment* tab, followed by *Center* and *Wrap Text* (Figure 6-16), and click  to return you to your report.



**Figure 6-16**

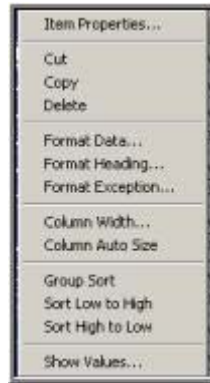
Your report is now set to wrap text in any cell. Move your cursor to the right-hand margin of a column header you have chosen to compress. Note that your cursor changes appearance, resembling a cross, with arrowheads on the horizontal axis. Press and hold the left-hand mouse button, and manually move the column-header border to the left. Because you've set the *Wrap Text* option in the previous step, the column header will change from a single, horizontal line of text to a 'stacked' appearance, similar to *Merchant State* in Figure 6-17.

Merchant Name	City	Merchant State
---------------	------	----------------

**Figure 6-17**

Reducing several columns in width permits a user to display more columns on a single-width page. This produces a report that is easier to both read and print.

To change a column heading, such as *Account Number* to *Acct #*, click on the cell containing the column header to be modified. This action will select, or highlight, the entire column for editing. Next, right-mouse click the selected column, and the menu shown in Figure 6-18 will appear.



**Figure 6-18**

Click on *Item Properties...* , which opens the *Item Properties* window. The *Heading* field contains the column header. See Figure 6-19.



**Figure 6-19**

Change the column header to an abbreviated but meaningful name, and click  . Using this method, you can customize the format and label of your report display to facilitate ease of printing or display.


Finally, save your report by clicking on , selecting a computer or the database for storing your report (Figure 6-20), and saving this report as *Date Ranges and Column Headers* (Figure 6-21).



Figure 6-20

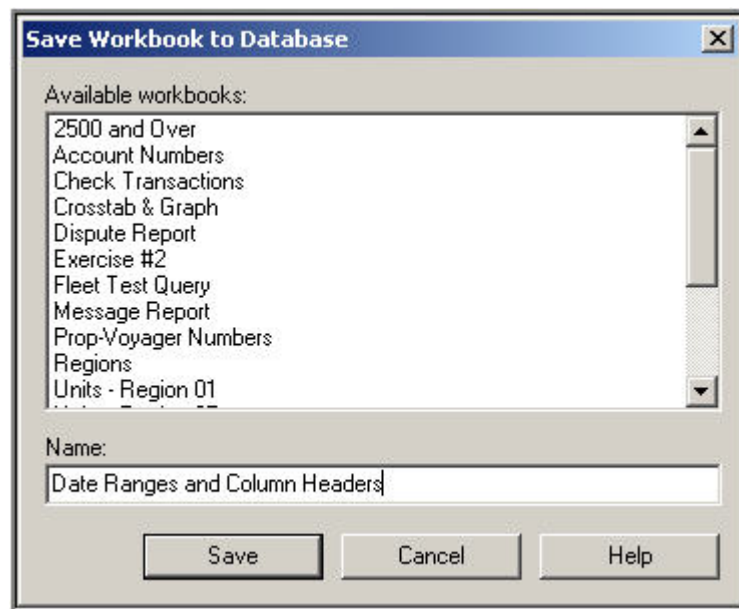


Figure 6-21

**Summary.** In this lesson/exercise, you successfully created a condition using a date range, and edited the format and column headers of your report. In the next lesson/exercise, you'll create a New Condition using a Greater Than (>) conditional operator.