



## Exercise 7: *Greater Than Conditional Operator*

### Lesson Description

Lesson 7 introduces the use of Greater Than as a conditional operator for a query/report. This lesson begins with the creation of a complex report displaying multiple fields from the *Fleet Detail*, *Product Code*, *Card Transaction*, and *Credit Card* folders.

### Training Objectives

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

1. Create a complex report using fields from up to four (4) different folders.
2. Create a *New Condition* using the Greater Than (>) conditional operator.

### 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 7-1

## Creating the Basic Query / Report

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

Next >

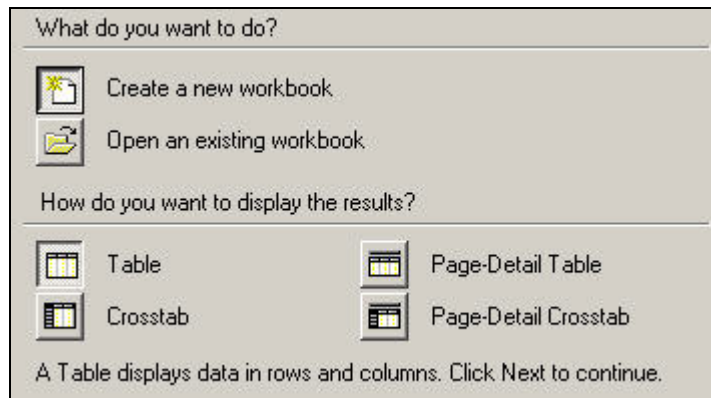




Figure 7-2

**Step 2.** Open the *Fleet Detail* folder from the *Available* column on the left by clicking  , and select *Product Code* and *Net Fuel Amount*.




**Figure 7-3**

Open the *Product Code* folder from the *Available* column on the left by clicking  , and select *Product Code Description*.




**Figure 7-4**

Open the *Card Transaction* folder from the *Available* column on the left by clicking  , and select *Product Code* and *Net Fuel Amount*.



**Figure 7-5**

Open the *Credit Card* folder from the *Available* column on the left by clicking  , and select *Cardholder/Prop Number*.



**Figure 7-6**

When these actions are completed, your *Selected* column on the right-hand side of the paged should appear like Figure 7-7 below. If yes, click  and to proceed through to Workbook Wizard Step 4.

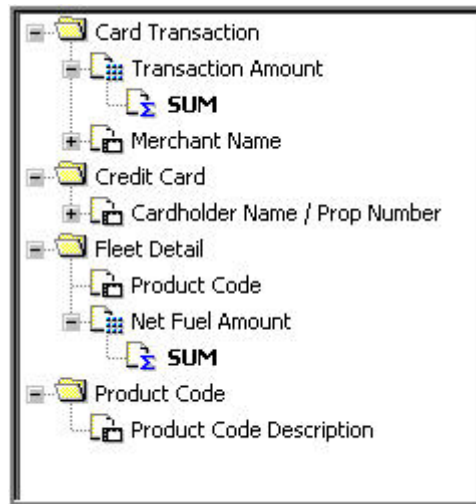


Figure 7-7

**Step 4.** Open the *All Items* drop-down list by clicking on  , shown in Figure 7-8.



Figure 7-8

The *View Conditions for:* selection list will appear. See Figure 7-9.

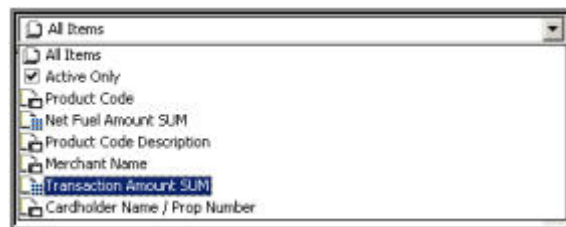


Figure 7-9

Select *Transaction Amount SUM*, and click  .

The *New Condition* window will appear, with selections in the *Item* and *Condition* fields as shown in Figure 7-10 below.



Figure 7-10

Click on under *Condition* to display a menu of available conditional operators. See Figure 7-11. Select **>**, the Greater Than conditional operator.

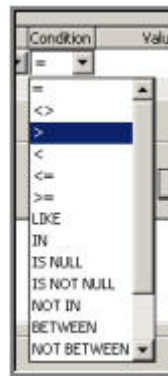


Figure 7-11

Under the *Value(s)* data entry field, enter the number **50**. When completed, your *New Condition* window should appear similar to Figure 7-12.

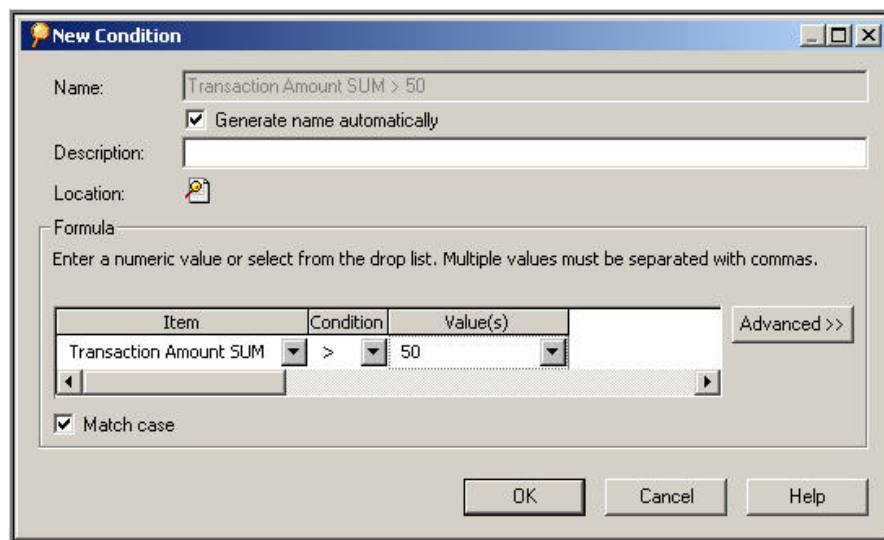
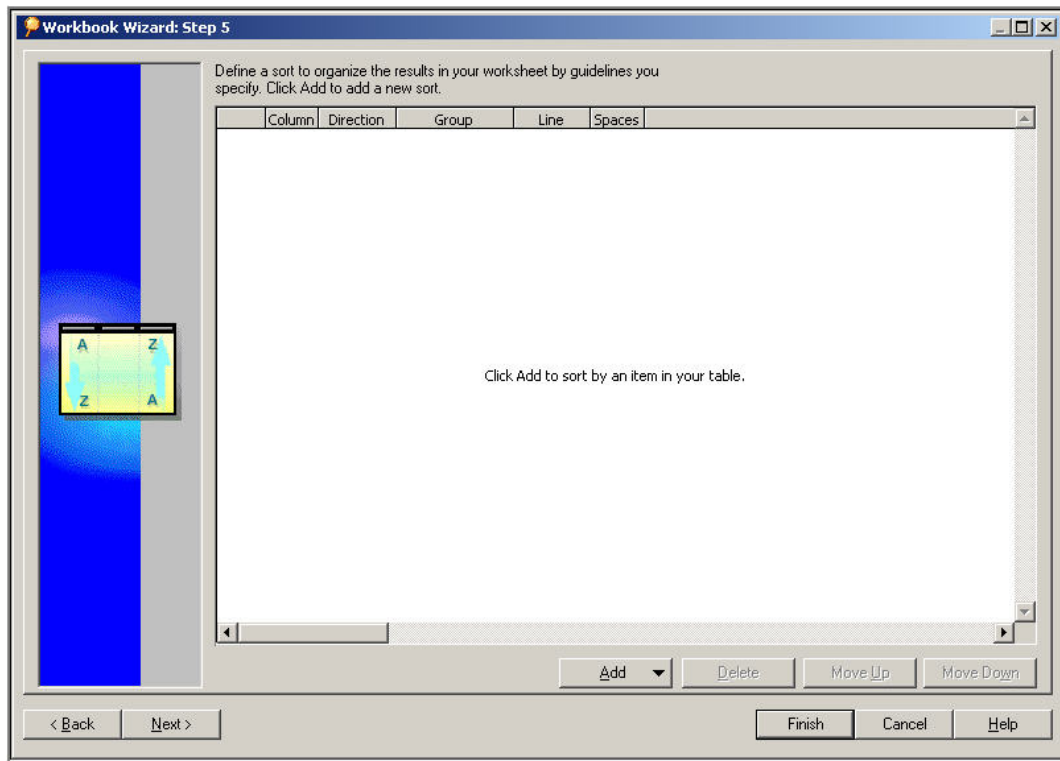


Figure 7-12

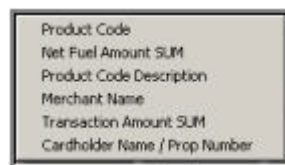
When this action is completed, click  , which will return you to the Workbook Wizard Step 4 window. Click  to proceed to the next Workbook Wizard window, where you'll add two *Group Sorts* to your query/report.

**Step 5.** The Workbook Wizard Step 5 page is shown in Figure 7-13 below.



**Figure 7-13**

Click on  , to access a menu of fields available for *Sort* operations. See Figure 7-14.



**Figure 7-14**

Select *Merchant Name*, then click  again and select *Cardholder/Prop Number*. Now you've selected two fields for an action. For Row 1 (*Merchant Name*), click on the  under *Group*, and select *Group Sort* from the menu. See Figure 7-15. Repeat this process for Row 2 (*Cardholder/Prop Number*).



Figure 7-15

Your selections should appear similar to Figure 7-16.

	Column	Direction	Group	Line	Spaces
1	<i>Merchant Name</i>	Lo to Hi	Group Sort	1	0
2	<i>Cardholder Name / Prop Number</i>	Lo to Hi	Group Sort	1	0

Figure 7-16

Your query is now ready to run. Click  to run your query and generate a report.

When the initial results appear, resize them by selecting the entire table, and using the *Format>Column>Auto Size* function at the tool bar. Adjust your column headings by selecting *Format>Headings*, and editing column sizes as learned in Lesson 6. When complete, your report should appear similar to Figure 7-17 below.

	Product Code	Net Fuel Amount SUM	Product Code Description	Merchant Name	Transaction Amount SUM	Cardholder Name / Prop Number
1	01	251.55	UNLEADED REGULAR 86	7 2 11 FOOD STORE 41 024	\$251.55	A251262
2	01	67.95	UNLEADED REGULAR 86	7 ELEVEN 32303 028	\$67.95	A279413
3	01	99.00	UNLEADED REGULAR 86	76 039	\$99.00	A251262
4	01	99.71	UNLEADED REGULAR 86		\$99.71	A251600
5	05	93.07	UNLEADED PREMIUM 90		\$93.07	
6	01	52.65	UNLEADED REGULAR 86		\$52.65	A251833
7	05	110.14	UNLEADED PREMIUM 90		\$110.14	
8	01	67.51	UNLEADED REGULAR 86		\$67.51	A251846
9	01	82.32	UNLEADED REGULAR 86		\$82.32	A252021
10	01	201.79	UNLEADED REGULAR 86		\$201.79	A252307
11	01	102.15	UNLEADED REGULAR 86		\$102.15	A279043
12	01	51.70	UNLEADED REGULAR 86		\$51.70	A279251
13	01	71.23	UNLEADED REGULAR 86		\$71.23	A279254
14	01	66.00	UNLEADED REGULAR 86		\$66.00	A279401
15	03	64.50	UNLEADED MID-GRADE 85		\$64.50	A279403
16	03	61.45	UNLEADED MID-GRADE 85		\$61.45	A279408
17	12	122.45	DIESEL		\$122.45	A279414
18	01	66.35	UNLEADED REGULAR 86		\$66.35	A279801
19	01	50.01	UNLEADED REGULAR 86		\$50.01	P0105005
20	01	221.83	UNLEADED REGULAR 86	A & W OIL COMPANY INC003	\$221.83	A251837
21	01	1413.27	UNLEADED REGULAR 86	ANDERSON'S CONOCO 013	\$1,419.27	A251836
22	05	55.98	UNLEADED PREMIUM 90		\$55.98	
23	12	222.92	DIESEL	AUGUSTA SERVICE 017	\$222.92	A279148
24	05	244.75	UNLEADED PREMIUM 90	BADGER BASIN CTRY ST 013	\$244.75	A279600
25	01	101.67	UNLEADED REGULAR 86	BIG HOLE PETROLEUM 047	\$101.67	A252019
26	01	72.75	UNLEADED REGULAR 86		\$72.75	A279030
27	01	50.50	UNLEADED REGULAR 86		\$50.50	A279043

Figure 7-17




Finally, save your report by clicking on , selecting a computer or the database for storing your report (Figure 7-18), and saving this report as *Date Ranges and Column Headers* (Figure 7-19).



Figure 7-18

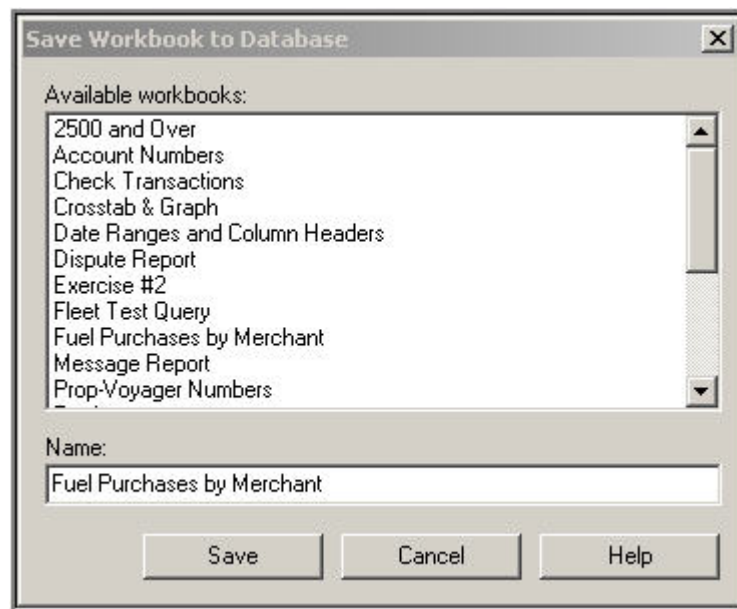


Figure 7-19

**Summary.** In this lesson/exercise, you successfully created a report on purchases in excess of \$50.00, by *Merchant Name* and *Cardholder Name/Prop Number*. In the next lesson/exercise, you'll create an Accounting Report to review valid accounting by *Unit* and *Sub Unit Voyager No* and *PCMS User ID*.



## Exercise 8: *Adding Totals to Reports*

### Lesson Description

Lesson 8 introduces the use of *Totals* and *Subtotals* as an added feature to your reports. This lesson begins with the creation of a report of fuel sales by *Product Code*, *Product Description* and *Transaction Amount*. Then, you'll learn to add totals and subtotals to your report.

### Training Objectives

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

1. Create a complex report, which details and summarizes fuel purchases for a specific period.
2. Add totals and subtotals to a report.

### Methodology

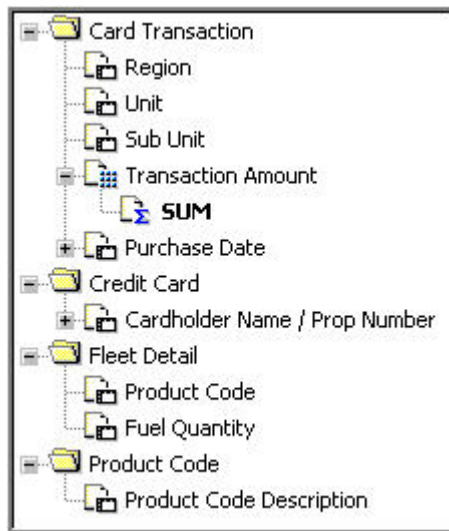
This lesson is delivered as a two-part exercise. In Part 1, students will create a report on fuel purchases as an individual practical exercise. Part 2 of this lesson, an Instructor-led exercise, will enhance the report by adding totals and subtotals to the final report.

References. None.

Enclosures. None.

## Part 1

1. Using your Fleet Username, log on to Discoverer.
2. Create a *New Workbook* and *Table-format* report.
3. Select the fields shown in Figure 8-1 for your report.



**Figure 8-1**

4. Change your table/column layout to mirror Figure 8-2 below.

Region	Unit	Sub Unit	Cardholder Name / Prop Number	Purchase Date	Product Code	Product Code Description	Fuel Quantity	Transaction Amount SUM
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**Figure 8-2**

5. Create a *New Condition* on *Purchase Date*, and select all fuel purchases for fiscal year 2002. See Figure 8-3 below.

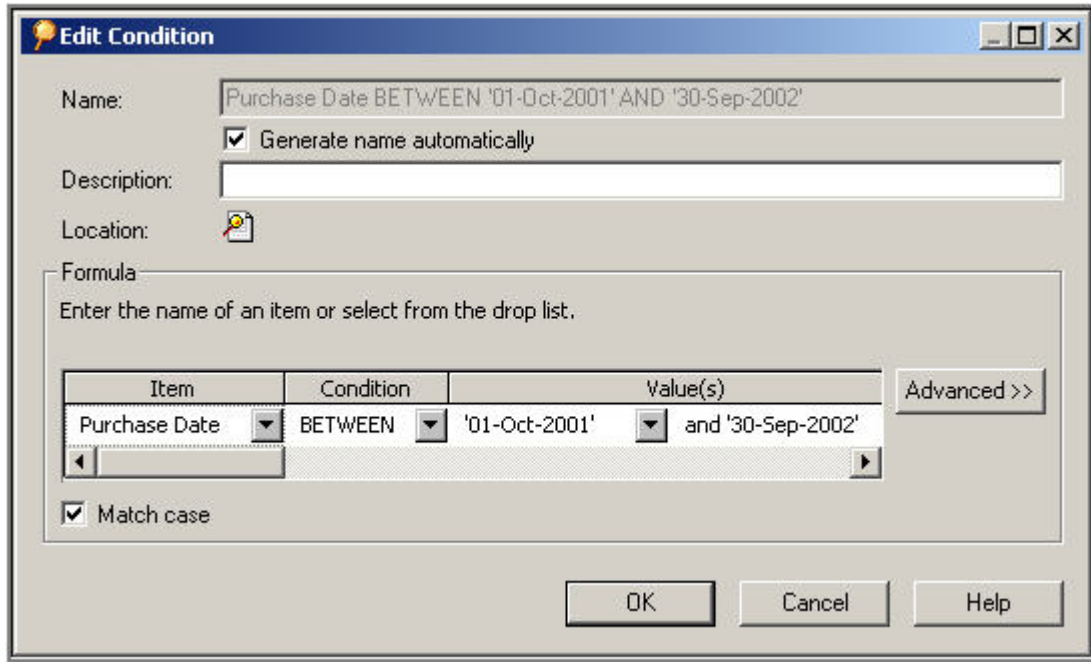


Figure 8-3

6. Create a *Group Sort* on *Region*, *Unit* and *Sub Unit*. See Figure 8-4.

	Column	Direction	Group	Line	Spaces
1	<i>Region</i>	Lo to Hi	Group Sort	1	0
2	<i>Unit</i>	Lo to Hi	Group Sort	1	0
3	<i>Sub Unit</i>	Lo to Hi	Group Sort	1	0
4	<i>Cardholder Name / Prop Number</i>	Lo to Hi	Group Sort	1	0

Figure 8-4

7. Now, run your query and view your report.



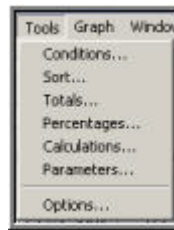
- 8. After you resize and format your report, your results should appear similar to Figure 8-5 below. If yes, you've successfully completed Part 1 of this lesson/exercise. Save your report as *FY2002 Fuel Purchase Report*, and wait for instructions.

	Region	Unit	Sub Unit	Cardholder Name / Prop Number	Purchase Date	Product Code	Product Code Description	Fuel Quantity	Transaction Amount SUM
▶ 1	01	00	00000	A11374	02-Oct-2001	05	UNLEADED PREMIUM 90	10	\$15.03
▶ 2					11-Oct-2001	05	UNLEADED PREMIUM 90	15	\$22.31
▶ 3					18-Oct-2001	05	UNLEADED PREMIUM 90	12	\$18.47
▶ 4					30-Oct-2001	05	UNLEADED PREMIUM 90	12	\$17.60
▶ 5					14-Nov-2001	05	UNLEADED PREMIUM 90	14	\$22.06
▶ 6					23-Nov-2001	05	UNLEADED PREMIUM 90	12	\$18.24
▶ 7					04-Dec-2001	05	UNLEADED PREMIUM 90	13	\$17.80
▶ 8					14-Dec-2001	05	UNLEADED PREMIUM 90	14	\$18.19
▶ 9					17-Jan-2002	05	UNLEADED PREMIUM 90	12	\$16.35
▶ 10					29-Jan-2002	05	UNLEADED PREMIUM 90	14	\$18.18
▶ 11					08-Feb-2002	05	UNLEADED PREMIUM 90	15	\$18.90
▶ 12					19-Feb-2002	05	UNLEADED PREMIUM 90	13	\$16.89
▶ 13					26-Feb-2002	05	UNLEADED PREMIUM 90	9	\$11.06
▶ 14					01-Mar-2002	05	UNLEADED PREMIUM 90	12	\$14.23
▶ 15					06-Mar-2002	05	UNLEADED PREMIUM 90	12	\$13.99
▶ 16					12-Mar-2002	05	UNLEADED PREMIUM 90	13	\$17.97
▶ 17					15-Mar-2002	05	UNLEADED PREMIUM 90	12	\$17.44
▶ 18					22-Mar-2002	05	UNLEADED PREMIUM 90	12	\$16.01
▶ 19					28-Mar-2002	05	UNLEADED PREMIUM 90	13	\$20.28
▶ 20					04-Apr-2002	05	UNLEADED PREMIUM 90	13	\$20.39
▶ 21					10-Apr-2002	05	UNLEADED PREMIUM 90	14	\$23.48
▶ 22					16-Apr-2002	05	UNLEADED PREMIUM 90	9	\$15.54
▶ 23					22-Apr-2002	05	UNLEADED PREMIUM 90	13	\$22.16
▶ 24					30-Apr-2002	05	UNLEADED PREMIUM 90	15	\$24.49
▶ 25					08-May-2002	05	UNLEADED PREMIUM 90	12	\$19.84
▶ 26					16-May-2002	05	UNLEADED PREMIUM 90	11	\$18.68

Figure 8-5

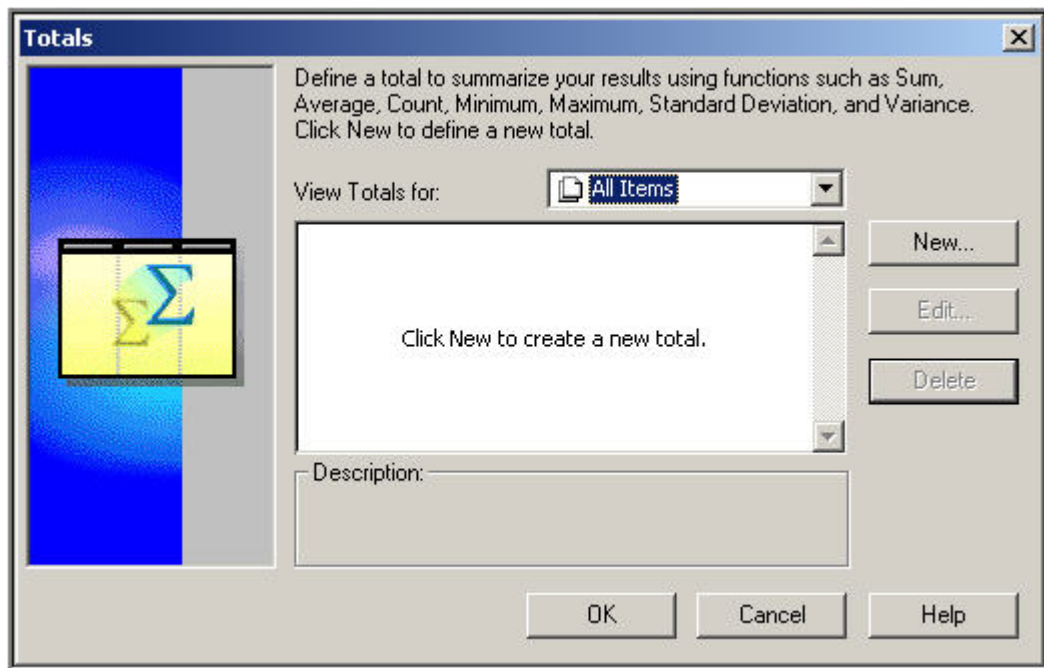
## Part 2

1. Select *Tools>Totals* from the tool bar at the top of the screen. See Figure 8-6.



**Figure 8-6**

2. The Totals window shown in Figure 8-7 below will appear.



**Figure 8-7**

- Click on in the window, which will present a menu of columns from which to select for total or subtotal functions. See Figure 8-8.

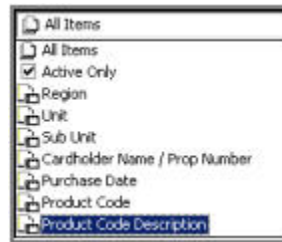


Figure 8-8

- Select *Sub Unit*, in order to create subtotals at each break in your report where *Sub Unit* changes, and click . The *Total* window in Figure 8-9 will appear.

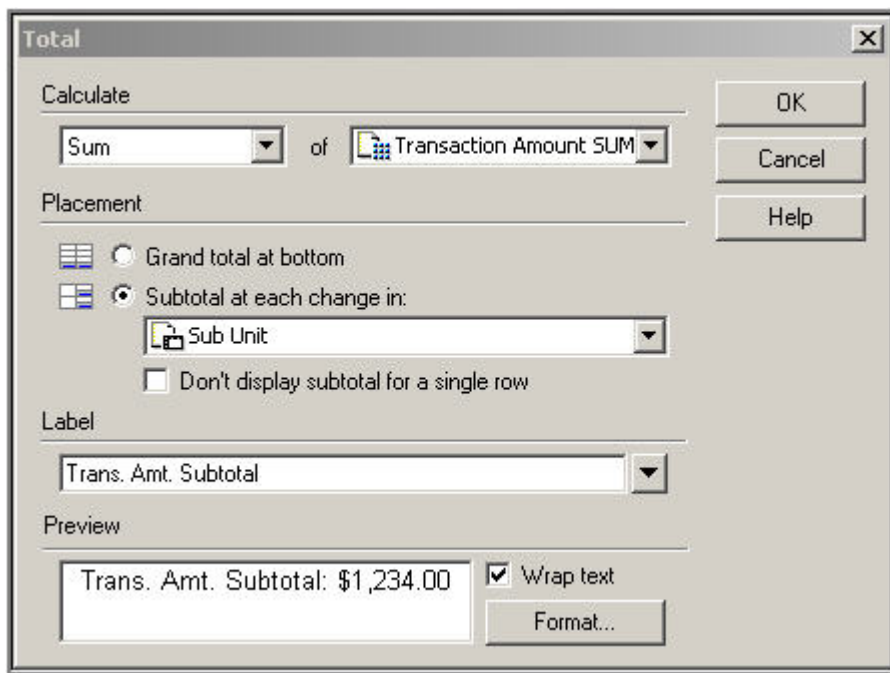


Figure 8-9

- Set the fields in the *Calculate* section of the *Total* window as shown in Figure 8-10.

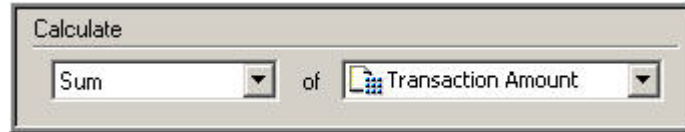


Figure 8-10

- Next, set fields in the *Placement* section of the *Total* window as shown in Figure 8-11.

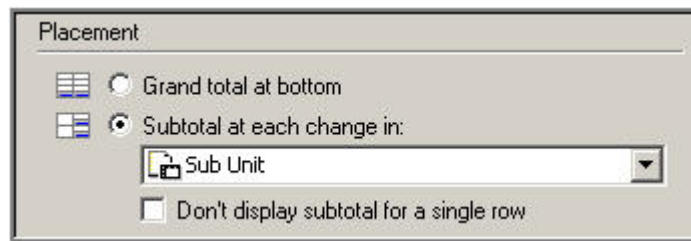


Figure 8-11

- Finally, insert a descriptive name in the *Label* field of the *Total* window. Note that the text in the *Preview* field is modified as you type text into the *Label* field. See Figure 8-12. Ensure the *Wrap text* checkbox is selected and click .

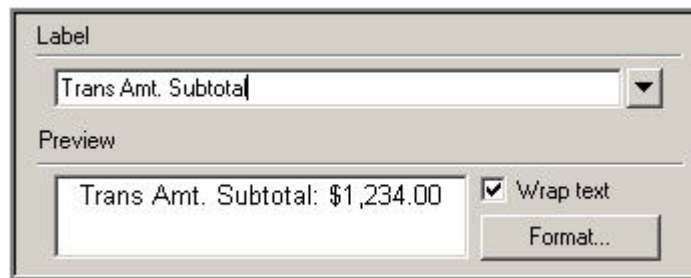


Figure 8-12



8. Now, a page break should appear whenever the *Sub Unit* in your report changes, containing a subtotal of the Transaction Amounts for that *Sub Unit*. Note the subtotal, which appears in the right-hand column of row 9703 in Figure 8-13.

▶ 9702			27-Mar-2002	01	UNLEADED REGULAR 86	16	\$22.70
9703							Trans. Amt. Subtotal: \$3,680.23
▶ 9704		00007	12-Feb-2002	12	DIESEL	38	\$48.00

Figure 8-13

9. Next, repeating the process used for subtotals, you'll create a *Total* for *Transaction Amount* for your report. Returning to the toolbar, select *Tools>Totals*.

**Total**

Calculate  
 Sum of Transaction Amount SUM

Placement  
 Grand total at bottom  
 Subtotal at each change in:  
 All Group Sorted Items  
 Don't display subtotal for a single row


Label  
 Trans. Amt. Total

Preview  
 Trans. Amt. Total: \$1,234.00  
 Wrap text  
 Format...

OK  
 Cancel  
 Help


Figure 8-14

10. At the *Total* window, select the options shown in Figure 8-14, use a descriptive name for your report's total in the *Label* field, and click .

11. Regenerate (or recompile) your report results by clicking  on the toolbar. Scroll to the bottom of your report, and you should see a *Total* in the final row of your report containing the sum of all *Transaction Amounts*. See Figure 8-15. Remember, if your report contains more than 100 rows, go to the tool bar, and select *Sheet>Retrieve All Rows*, so you can see the final row of data in your results set.

▶ 10021				08-Apr-2002	01	UNLEADED REGULAR 86	27	\$32.36
▶ 10022				01-May-2002	12	DIESEL	41	\$60.67
10023								Trans. Amt. Subtotal: \$10,832.83
10024								Trans. Amt. Total: \$249,836.32

Figure 8-15

12. Finally, click  to save the modifications you added to this report in **Part 2** of this lesson/exercise.

**Summary.** In this lesson, you learned how to add totals and subtotals to your report results. In the next and final lesson of *Fleet / Oracle Discoverer Training Guide*, you learn how to share your reports with other Discoverer users.



## Exercise 9: *Sharing or Deleting Reports*

### Lesson Description

Lesson 9 provides *Oracle Discoverer* users with the ability to share useful reports with other users, or to delete unneeded reports.

### Training Objectives

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

1. Share a report with another user.
2. Delete a 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 9-1

### Sharing Workbooks

When logging into Oracle Discoverer, the first Workbook Wizard page will automatically appear. Close this page by clicking on the in the upper right-hand corner. See Figure 9-2 below.



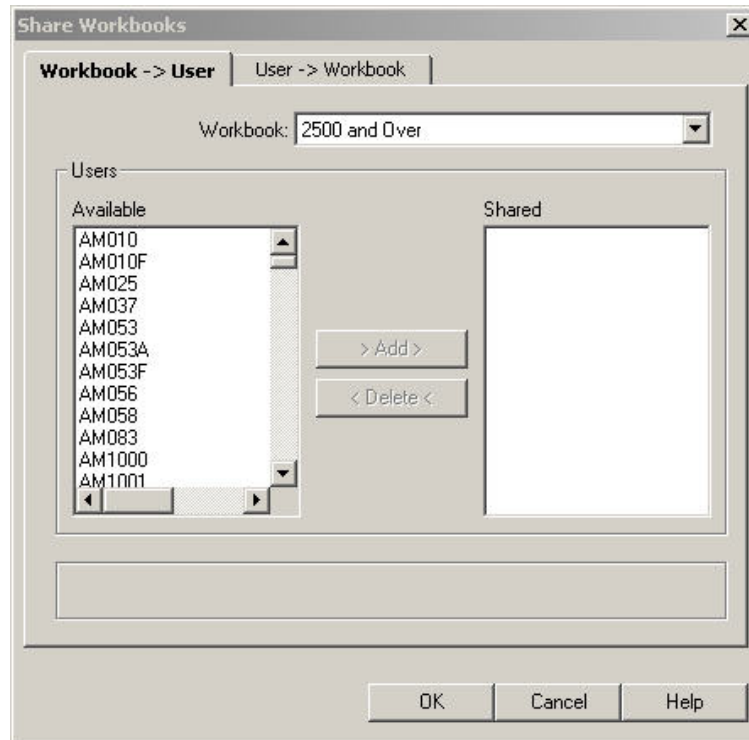
Figure 9-2

Next, go to the toolbar, and select *File>Manage Workbooks>Sharing*.




Figure 9-3

This action will open the *Share Workbooks* window. See Figure 9-4.



**Figure 9-4**

The *Share Workbooks* window has two (2) tabs, the *Workbook -> User* tab and the *User -> Workbook* tab. The *Workbook -> User* tab is used to provide one or more users access to a single report. The *User -> Workbook* tab is used to provide multiple reports to a single user.

To provide one or more users access to a single report, from the *Workbook -> User* tab, first select the report to be shared from the *Workbook:* list (Figure 9-5) by clicking on  and selecting the report by name.



**Figure 9-5**

Next, select a single user by clicking on their User ID from *Available* list in the *Users* window. See Figure 9-6.

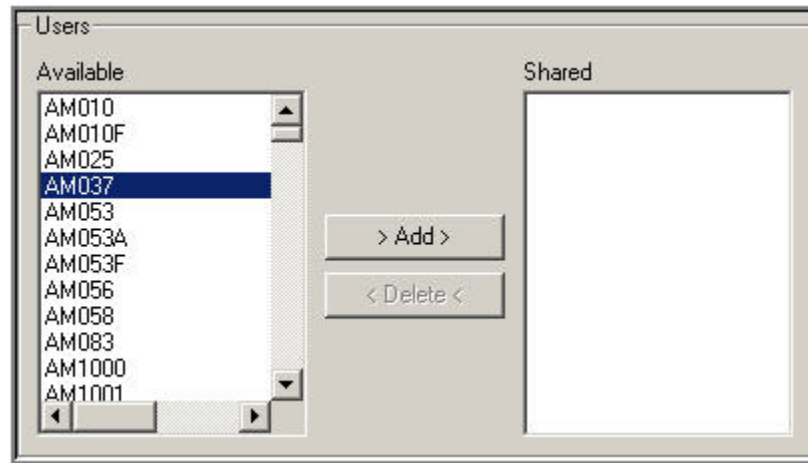


Figure 9-6

To select multiple users, hold down the *Ctrl* key, and click each shared user with your mouse. Once you've highlighted the shared user or users, click , and the user name(s) will be moved to the Shared list. Then click , and the report you selected for sharing will immediately be available to the user(s) you selected.

To share multiple reports with a single user, first click on the *User -> Workbook* tab on the *Share Workbooks* window. (See Figure 9-7)

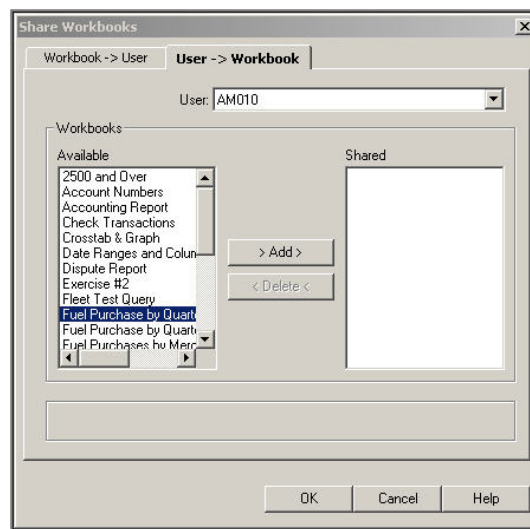


Figure 9-7


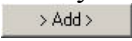

Next, select a User by clicking  on the *User:* field drop-down menu, and selecting a User ID from the list. See Figure 9-8.



Figure 9-8

Once you've identified a User, select a report or multiple reports from the Available list, and click  (See Figure 9-9), which will return you to the *Share Workbooks* window. Click , and the report or reports you selected are immediately available to the User selected.

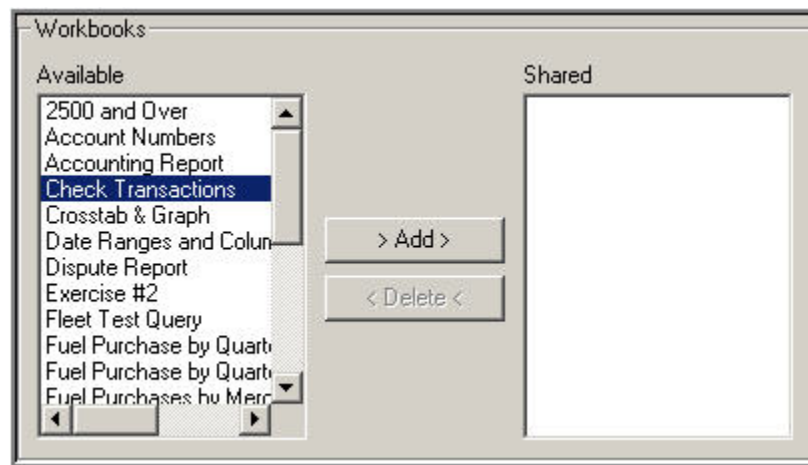
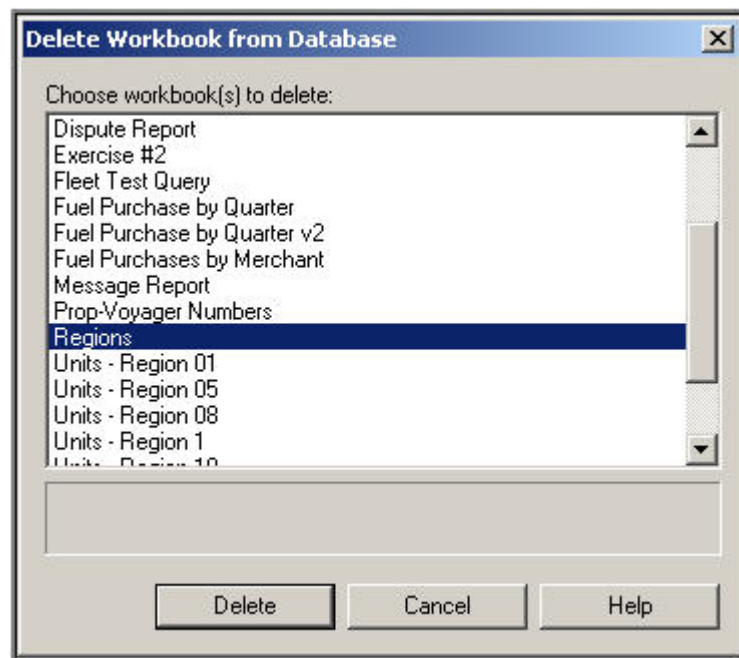


Figure 9-9


## Deleting Workbooks

Over time, you will likely find you have reports (*Workbooks*) stored in the database, which you neither need nor want... so DELETE them.

Go to the tool bar at the top of the *Oracle Discoverer* window, and select *File>Manage Workbooks>Delete*. This action will open the *Delete Workbook from Database* window.



**Figure 9-10**

Click on the report or reports you wish to delete, and then click on . The report or reports selected are immediately deleted from the database.

**Summary.** In this final lesson/exercise, you learned how to share a report or reports with a single or multiple Users. Additionally, you learned how to delete obsolete reports from the database.

This is the final lesson for *Fleet Oracle Discoverer* users. By applying the knowledge and experience gained in this and previous lesson/exercises, you are well prepared to begin creating your own custom ad hoc reports. Retain and use these lesson/exercise outlines to assist you in this endeavor.