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, PCMS Area Program Coordinators and Local Area Program Coordinators will be able to:

1. Open Discoverer on their desktop computer workstation.

2. Log on to PCMS through Discoverer, using their individual Username and Password.

Methodology

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

References. None.

Enclosures. None.

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Logging On To Discoverer

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

If you're 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.
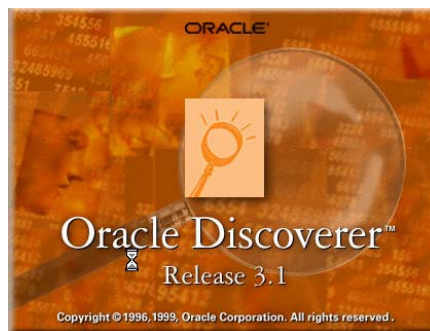

Figure 1-1

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.

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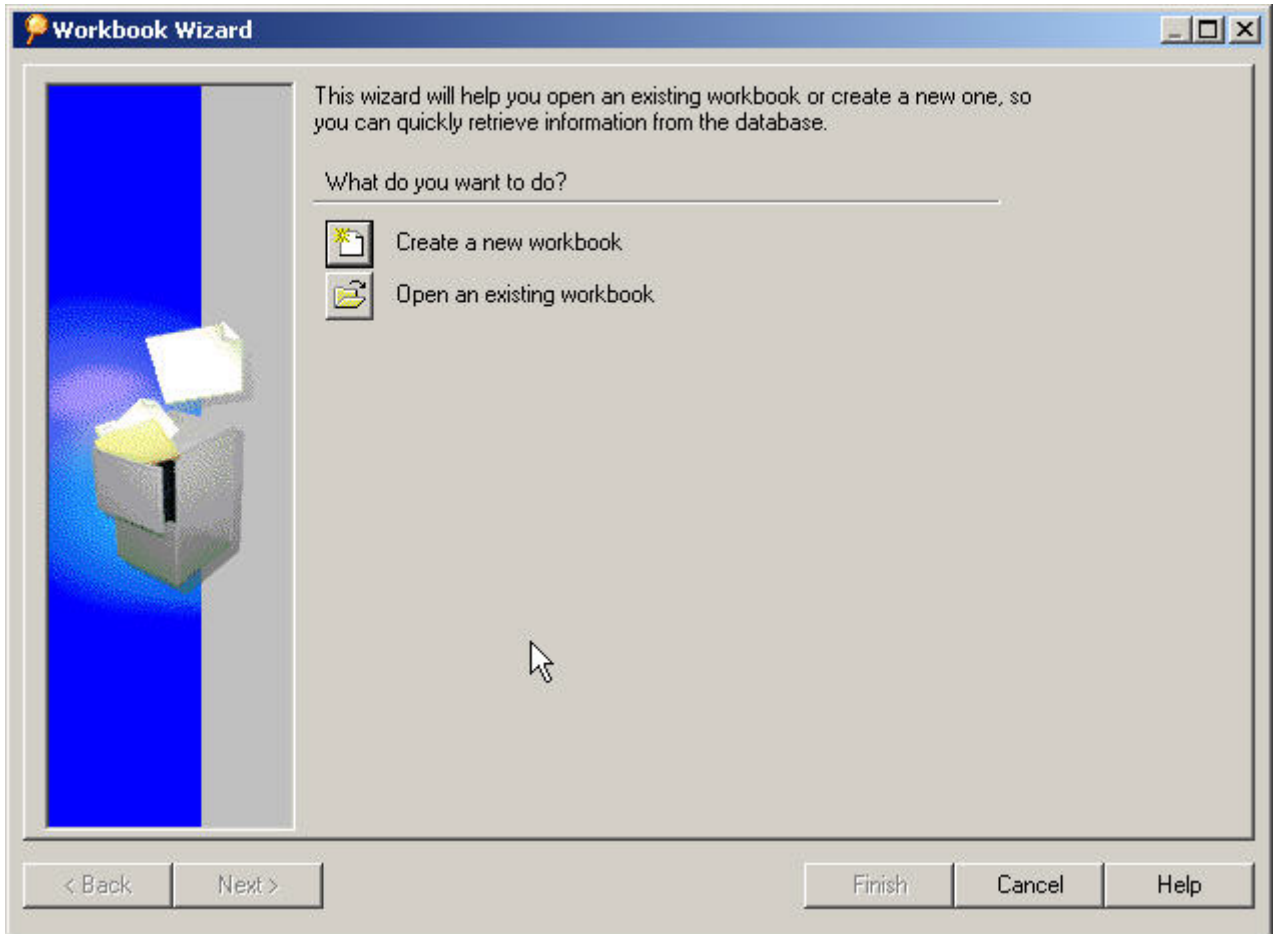

Figure 1-3

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 Report*

Lesson Description

Lesson 2 is 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, PCMS Area Program Coordinators and Local Area Program Coordinators will be able to:

3. Using the Workbook Wizard, develop a simple query.
4. Create a simple report in table format.
5. 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 1through 4 listed above, we'll create a simple report listing the account numbers of PCMS Cardholders in the Region/Unit of your choice.

Once you've successfully logged on to Discoverer, the first Workbook Wizard window will appear.
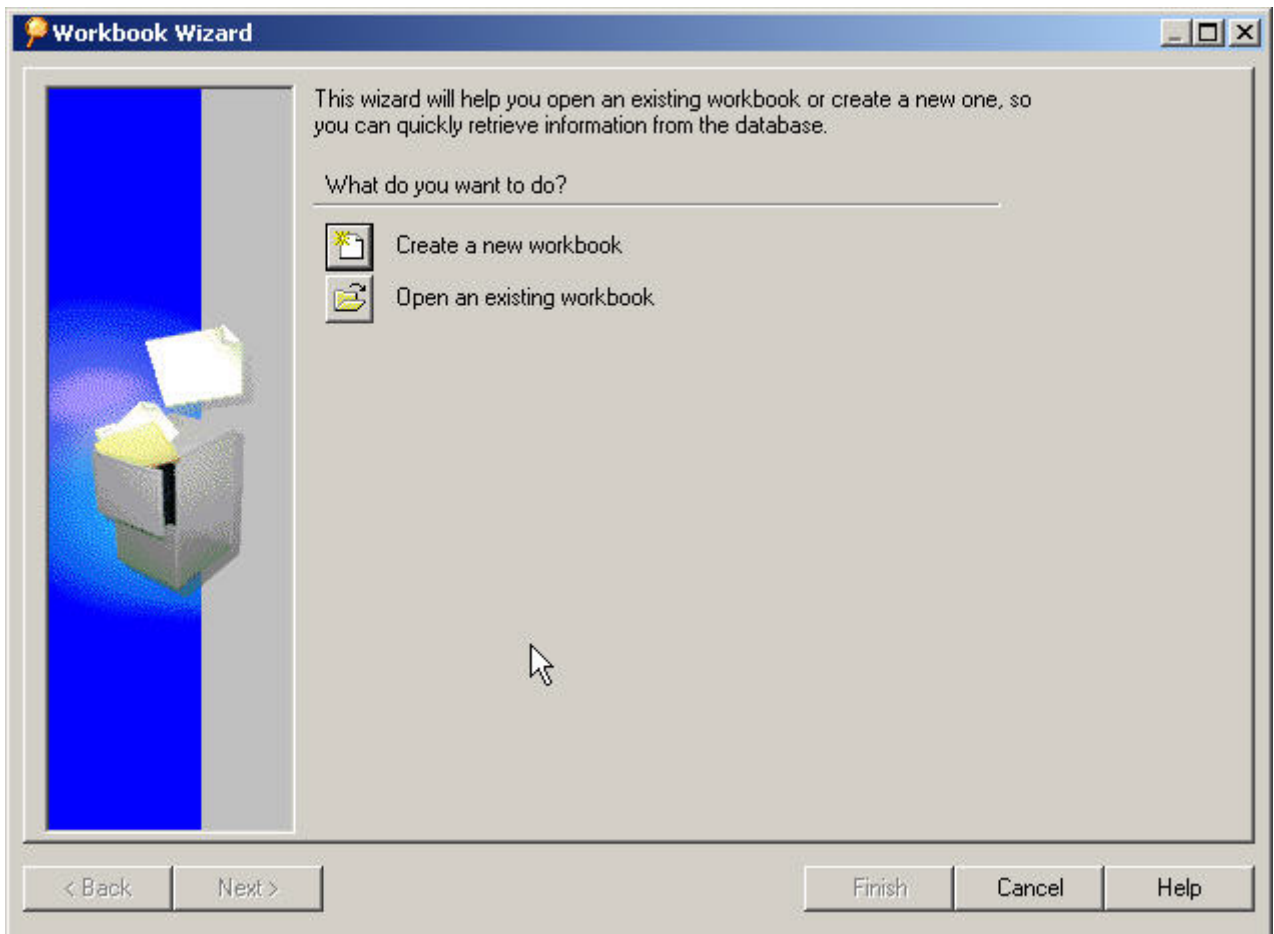
Figure 2-1

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

| ‹ Back | Next › | Options... | | Finish | Cancel | Help |

Figure 2-2

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

‹ Back	The 'Back' butt returns the Workbook Wizard to the previous screen. When you are on the first Workbook Wizard screen, this button in inactive (gray).
Next ›	'Next' moves Workbook Wizard to the next screen. On the first Workbook Wizard screen, this button in 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.
Options...	The 'Options' button sets defaults for query format and display settings. This button is inactive (gray) on the initial Workbook Wizard screen.
Finish	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.
Cancel	Use 'Cancel' to cancel the current task or step.
Help	This button opens a help file on using the Discoverer Workbook Wizard.

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

| Table | Page-Detail Table |
| Crosstab | Page-Detail Crosstab |

A Table displays data in rows and columns. Click Next to continue.

Figure 2-3

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Click on [icon] to select a *Table* format, which will display data in a 'rows and columns' format. Then click on [Next >] to continue building your query, and proceed to the next Workbook Wizard screen.
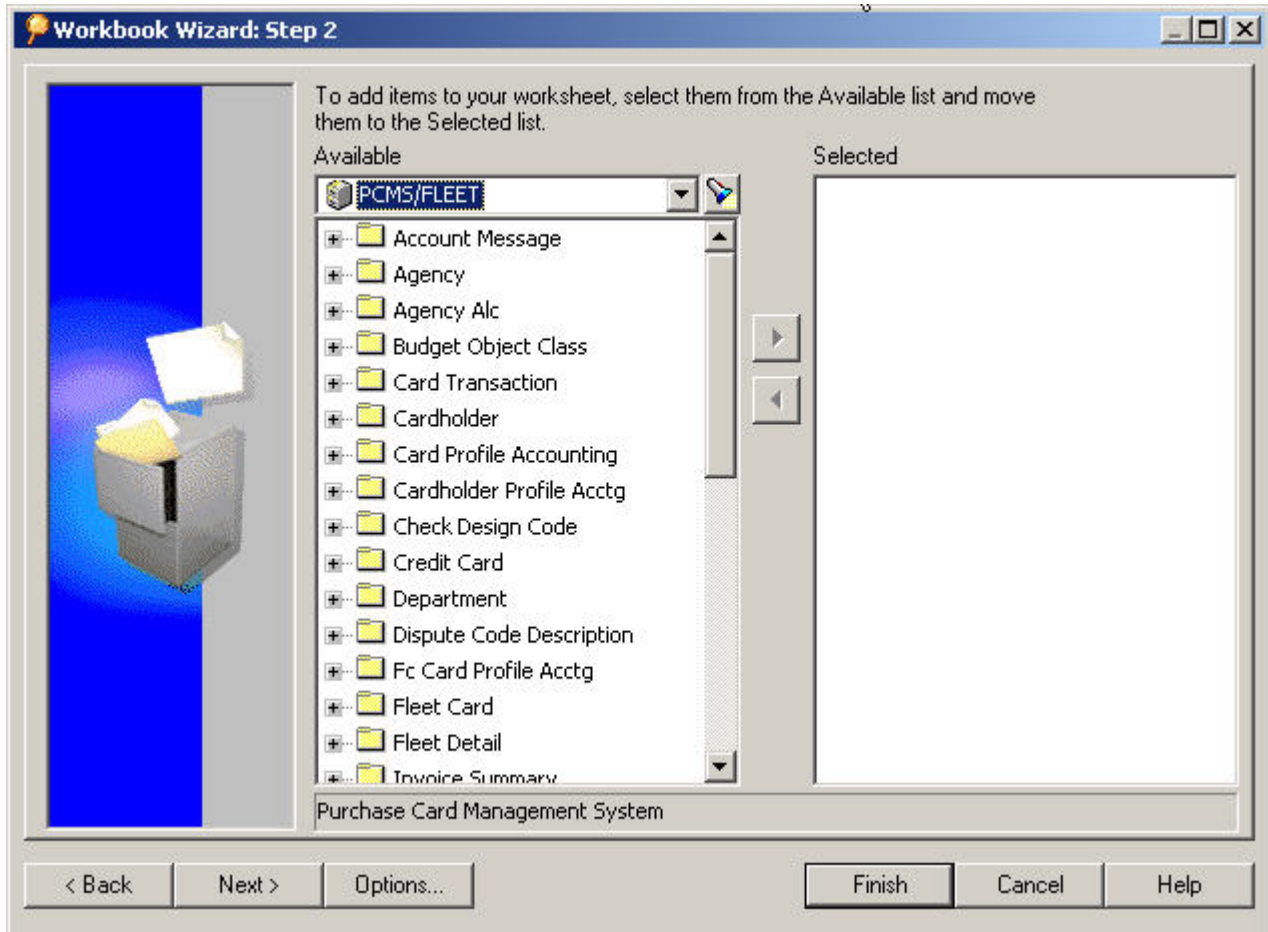

Figure 2-4

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 [PCMS/FLEET dropdown] 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 *Cardholder* 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)
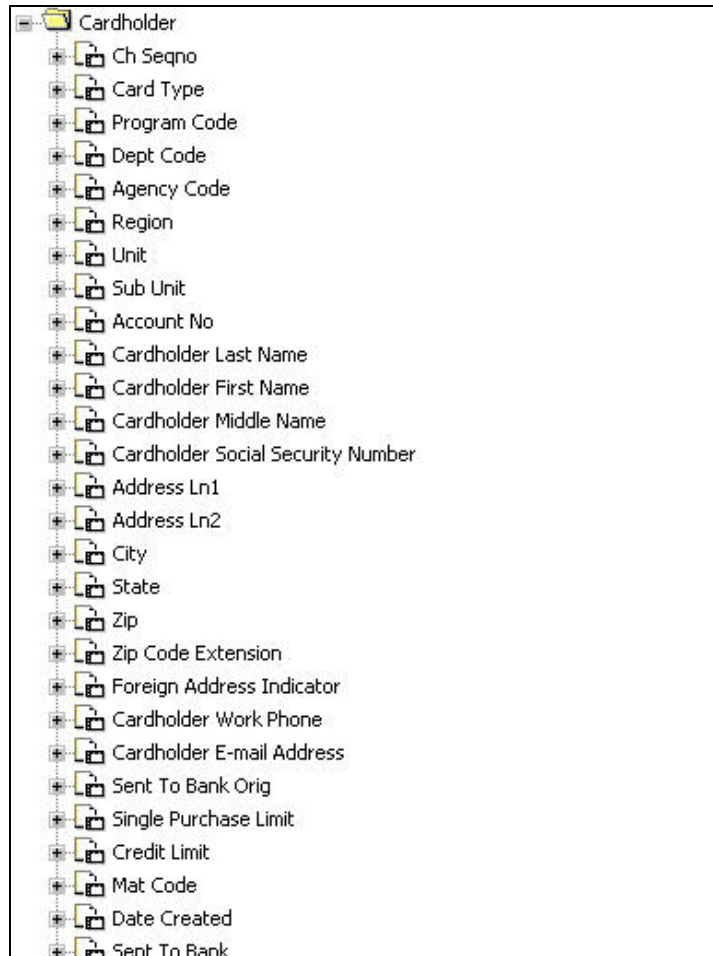
Figure 2-6

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. *Account No*
5. *Cardholder Last Name*
6. *Cardholder First Name*

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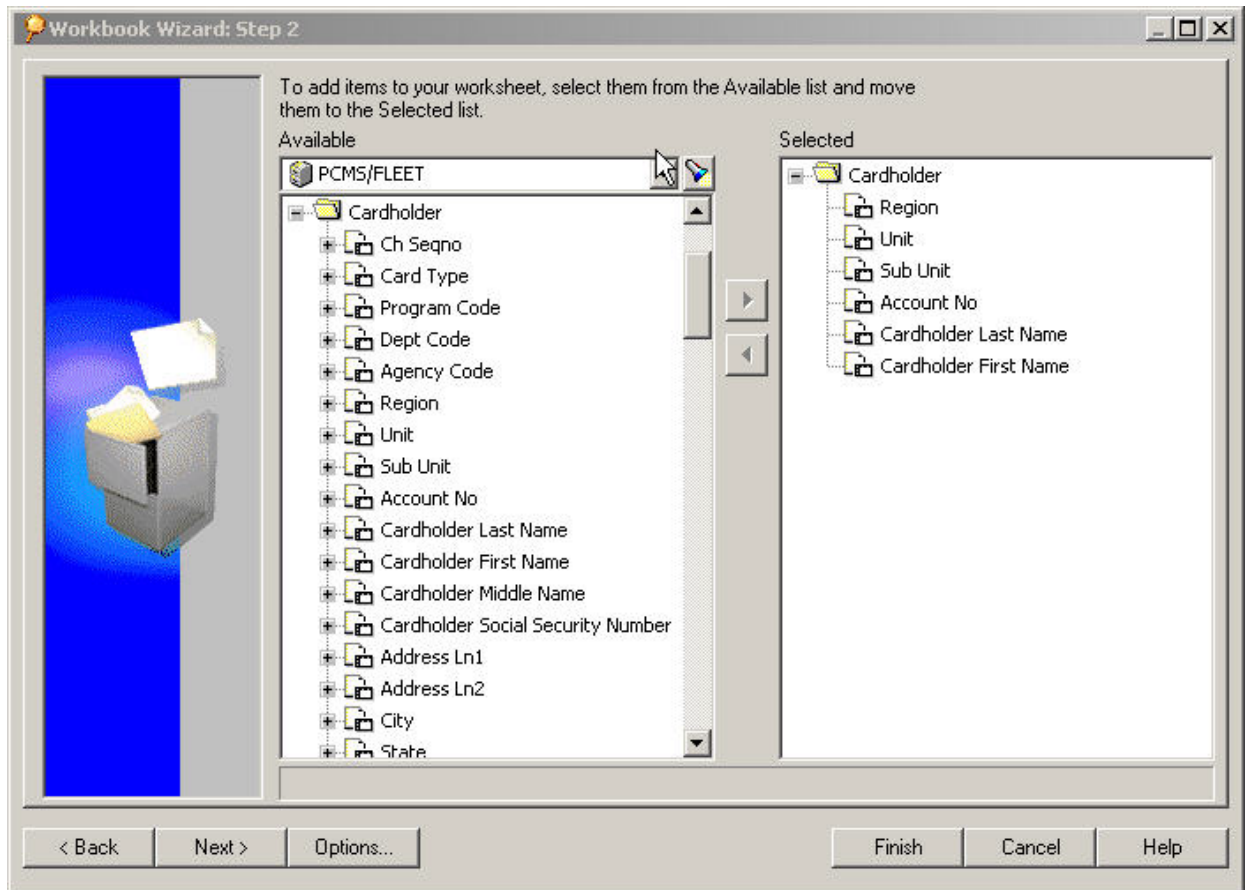

Figure 2-7

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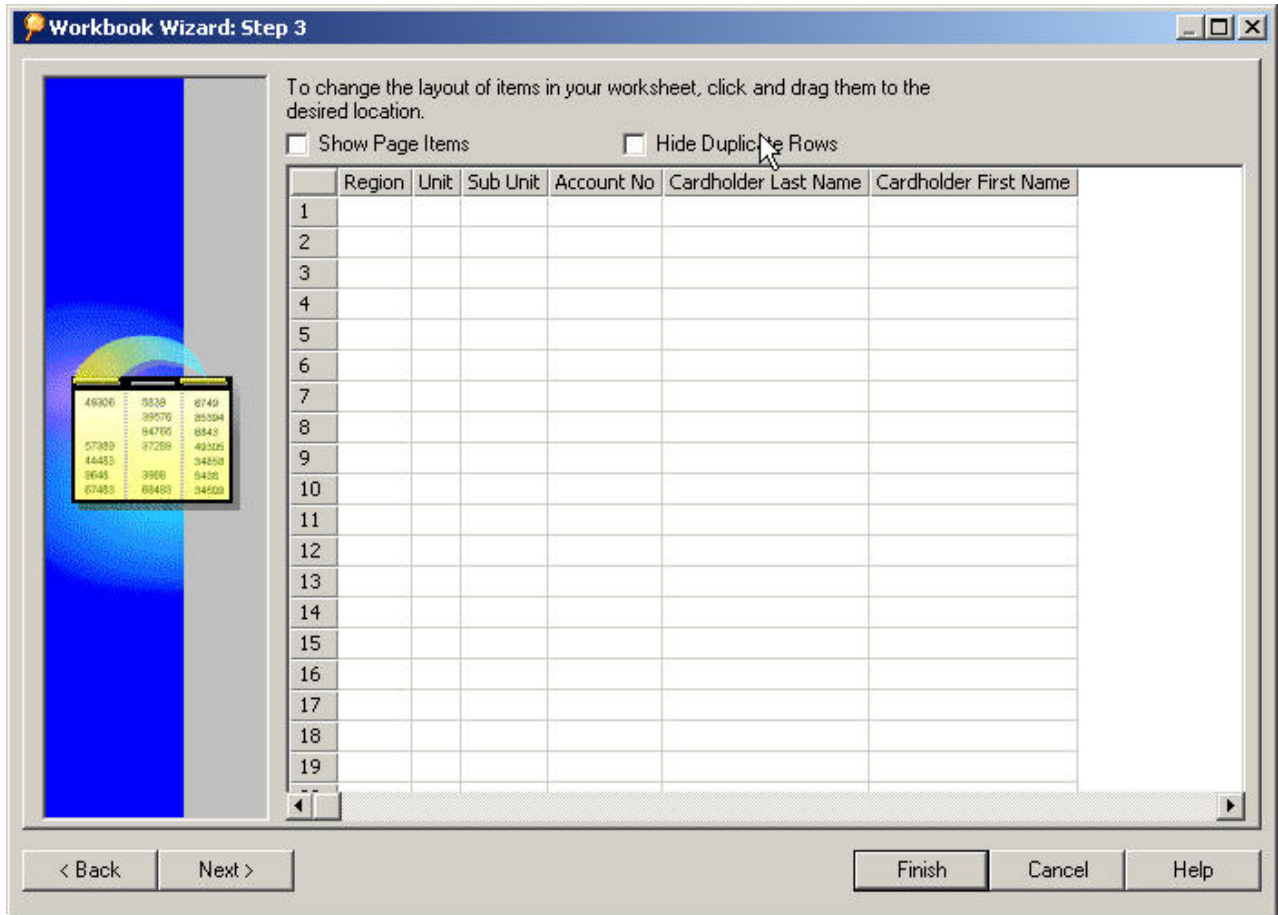

Figure 2-8

<u>Step 3.</u> Now, customize your data display, using the drag-and-drop method, to move *Account No* to the right of *Cardholder First Name*. When your display is modified, click [Next >] to proceed to the next Workbook Wizard screen.

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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*.

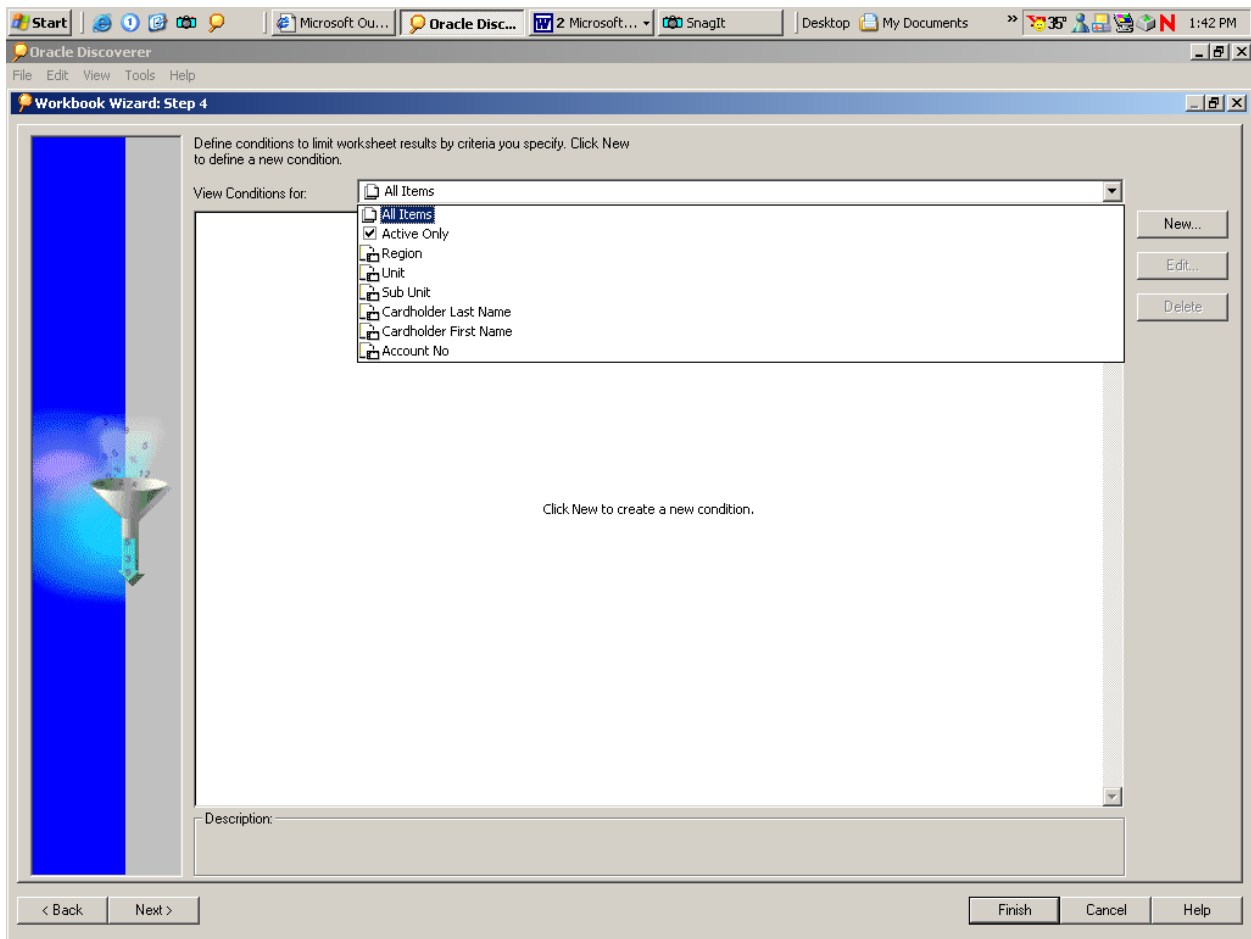Click on View Conditions for: All Items ▼ for the drop-down list as shown in Figure 2-9 below, and select *Region*.

Figure 2-9

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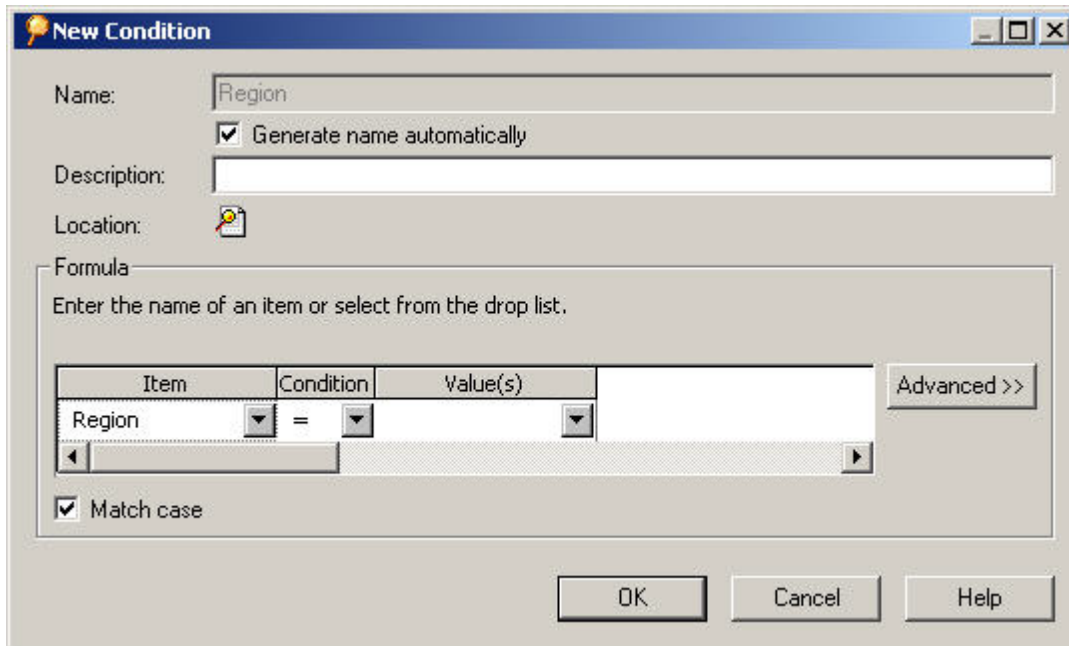Next, click [New...] , and the New Condition window in Figure 2-10, shown below, will appear.

Figure 2-10

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.
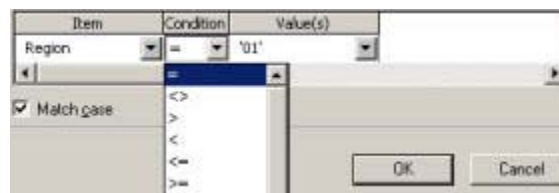

Figure 2-11

Enter a *Region* number in the *Value(s)* field, enclosed in single quotes, like the example shown in Figure 2-11, and click [OK] .

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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 [Finish] .

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 *Account No* column has been truncated for security.

	Region	Unit	Sub Unit	Cardholder Last Name	Cardholder First Name	Acct No
1	01	01	00000	THAYER	DONALD	
2	01	01	00000	PENNSABENE	JOHN	
3	01	01	00000	FIDDLER	WALTER	
4	01	01	00000	RAJKOWSKI	KATHLEEN	
5	01	01	00000	JUNEJA	VIJAY	
6	01	01	00000	SCHNEIDER	MARILYN	
7	01	01	00000	BOSWELL	TOM	00001435
8	01	01	00000	MANGOS	THOMAS	00001412
9	01	01	00000	EBLEN	SHAWN	00001413
10	01	01	00000	DUDLEY	ROBERT	00001414
11	01	01	00000	HAMPSON	JAMES	00001423
12	01	01	00000	RICHARDSON	ELIZABETH	00001413
13	01	01	00000	FIDDLER	WALTER	00001415
14	01	01	00000	IWANYSHYN	WENDY	00002318
15	01	02	00000	CASSIDY	HELEN	
16	01	02	00000	BROUILLETTE	JANINE	
17	01	02	00000	IRWIN	PETER	
18	01	02	00000	SNYDER	MARLISE	
19	01	02	00000	SOROKA	DOUGLAS	
20	01	02	00000	HOLSINGER	VIRGINIA	00000551
21	01	02	00000	MILLER	ROBERT	00000552
22	01	02	00000	MORPHEW	JOHNNY	00001422
23	01	02	00000	BUTTERFIELD	JAMES	00000555
24	01	02	00000	CRAWFORD	CLAUDE	00000544
25	01	02	00000	STOLER	RICHARD	00000546
26	01	02	00000	CASSIDY	HELEN	00000547
27	01	02	00000	SNYDER	MARLISE	00000549
28	01	02	00000	PACE	DEREK	00002326

Sheet 1

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:

| 100	01	11	00000	HANOVER	JEANNETTE	0000127156
▼	*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*.

File   Edit   View   Sheet   Format   Tools   Graph   Window   Help

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 [OK] to close this window.
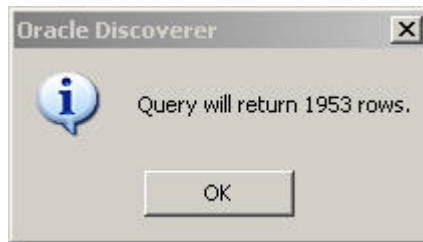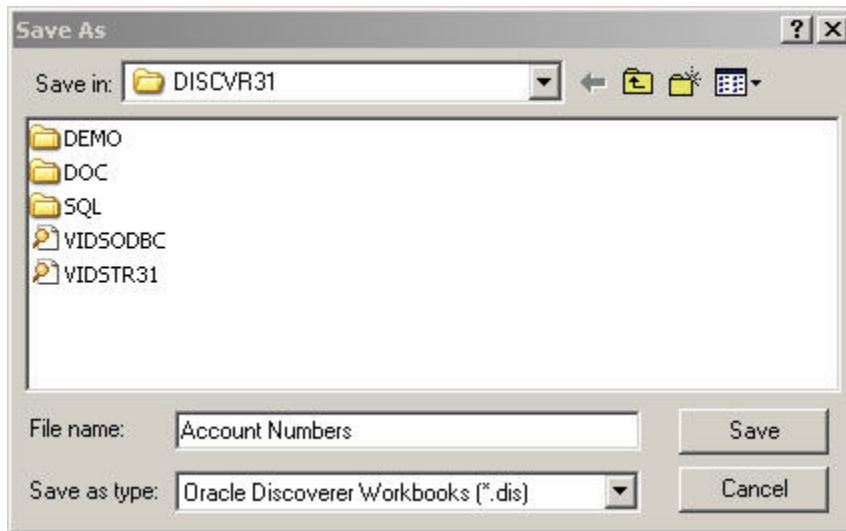

Figure 2-16

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.
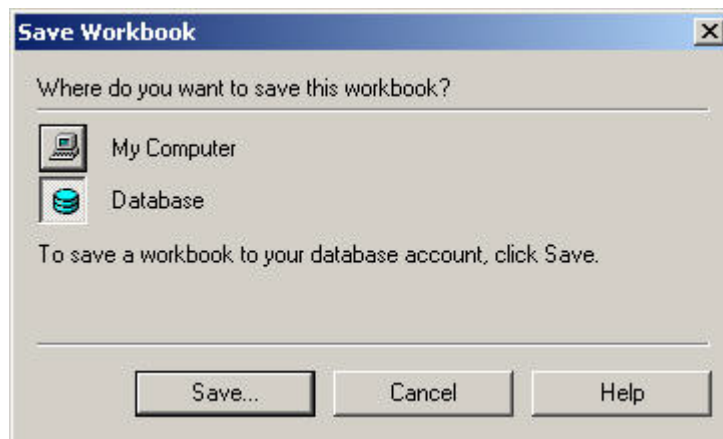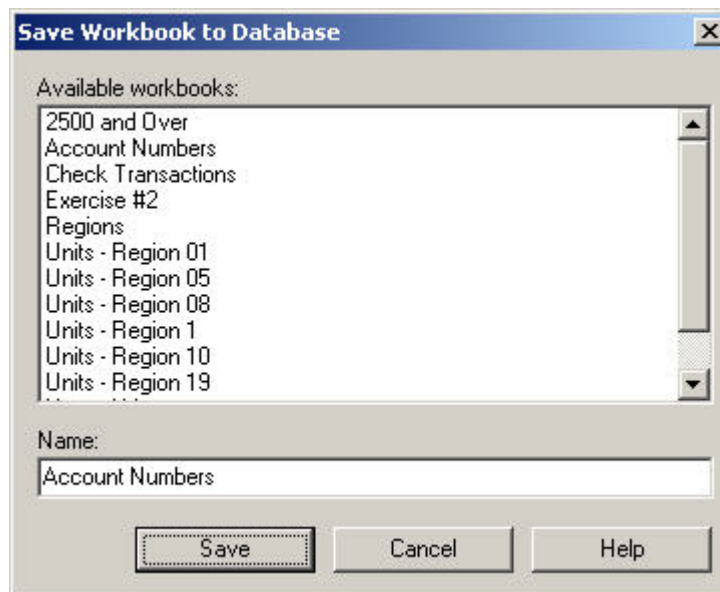

Figure 2-17

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 *Account Numbers* in the *File Name* field and click on ⌞ Save ⌟ .

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 listing PCMS Cardholders and Account Numbers in a Specific Region and Unit. In the next lesson/exercise, you will create another basic report, edit that report after creation with additional sorts, and change the page layout of your report.