



# Exercise 6: Adding a Group Sort

## Lesson Description

The exercise in Lesson 6 creates a report that displays unread PCMS User Messages by *Cardholder Name* and *Account Number*.

## Training Objectives

At the conclusion of this lesson, PCMS Area Program Coordinators and Local Area Program Coordinators will be able to:

1. Add a Group Sort.

#### Methodology

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

References. None.

Enclosures. None.



#### Preparation. Using your PCMS Username, log on to Discoverer

N. Contraction of the second sec	Connection	Connect
11/	Username:	Cancel
N-	Password:	Help
$\mathbb{Y}$	Connect: pcmsprod	About
TO	_ Status	
Discoverer <sup>™</sup> Release 3.1 ORACLE	Please enter your username, password	d and the database name.

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

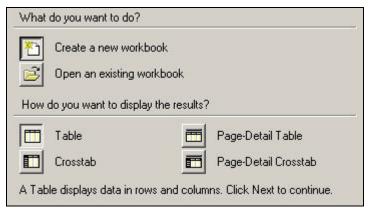
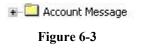


Figure 6-2



**<u>Step 2</u>**. Next, open the *Account Message* folder from the *Available* column on the left, by clicking on the **I**.



Select the following fields:

- 1. Region
- 2. Unit
- 3. Sub Unit
- 4. Account Number
- 5. Message Status

• ·	Credit Card

Figure 6-4

Next, open the *Credit Card* folder from the *Available* column on the left, by clicking on the , and select *Cardholder Name / Prop Number*. When this action is completed, the *Selected* column on the right-hand side of the page should appear like Figure 6-5 below. If yes, click Next to proceed.

	Account Message
	🔁 Unit
	Account Number
E	🛓 🕞 Message Status
1	🔁 Credit Card
-	🛓 🕞 Cardholder Name / Prop Number

Figure 6-5

**<u>Step 3</u>**. No customization of the layout of the report is required, so click and proceed to the next Workbook Wizard page.



**Step 4.** To set the conditions for your query/report, click the  $\square$  next to *All Items*. Once again, depending on the permissions granted to your Username, you may want to set conditions for *Region*, *Unit* and *Sub Unit*, as done in previous lessons. Then select *Message Status*, and click  $\square$ . In the *Condition* field of the *New Condition* window, click  $\square$  to open the drop-down list of conditional operators. Select the Equal Sign (=) conditional operator, enter 'U' in the *Value(s)* field, and click  $\square$ . See Figure 6-6 below.

Name:	Messag	e Status = 'l	J.			
	🔽 Gen	erate name	automatically			
Description:	-					
Location:	2					
Item		iondition	Value(s)	-		Advanced >>
I MESSAGE DL	1005		·			
Message St						

Figure 6-6





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

Your results set table should now appear similar to Figure 6-7 below. Once again, the *Account Number* column has been deliberately compressed for security.

F	Region	Unit	Sub Unit	unt Nu	Message Status (R/U)	Cardholder Name / Prop Number
1	01	05	00000	002005	U	BARB RASH
2	01	05	00000	002005	U	BARB RASH
3	01	05	00000	002005	U	BENNIE WEDDLE
4	01	05	00000	002005	U	BENNIE WEDDLE
5	01	05	00000	002005	U	CAROL A SMITH
6	01	05	00000	002005	U	CAROL A SMITH
7	01	05	00000	002005	U	CAROL A SMITH
8	01	05	00000	002005	U	CHARLES A LAWRENCE
9	01	05	00000	002005	U	CHARLES A LAWRENCE
10	01	05	00000	002005	U	CHARLES A LAWRENCE
11	01	05	00000	002005	U	CHARLES A LAWRENCE
12	01	05	00000	002005	U	CHARLES A LAWRENCE
13	01	05	00000	002005	U	CHARLES A LAWRENCE
14	01	05	00000	002005	U	CONNIE CRAWFORD
15	01	05	00000	002005	U	CONNIE CRAWFORD
16	01	05	00000	002005	U	CONNIE CRAWFORD
17	01	05	00000	002005	U	CONNIE CRAWFORD
18	01	05	00000	002005	U	CONNIE CRAWFORD
19	01	05	00000	002005	U	CONNIE CRAWFORD
20	01	05	00000	002005	U	CONNIE CRAWFORD
21	01	05	00000	002005	U	CONNIE CRAWFORD
22	01	05	00000	002005	U	CONNIE CRAWFORD
23	01	05	00000	002005	U	CONNIE CRAWFORD
24	01	05	00000	002005	U	CONNIE CRAWFORD
25	01	05	00000	002005	U	CONNIE CRAWFORD
26	01	05	00000	002005	U	CONNIE CRAWFORD
27	01	05	00000	002005	U	CONNIE CRAWFORD
28	01	05	00000	002006	Ű	DEBBIE GOIN
29		05	00000	เลอกรากก	<u> </u>	DEBICK FISHER
	Sheet 1				•	

Figure 6-7

Your initial results set has several columns of data, which are repetitive and unnecessary. Return to the *Edit Sheet* page and customize your report, using techniques learned in previous lessons, to group data by *Cardholder Name / Prop Number* and *Account Number*, and to hide redundant data contained in columns such as *Message Status*. See Figure 6-8 below.

	Column	Direction	Group		Line	Spaces
1	Account Number	Lo to Hi 📩	Group Sort	- 1		0 ∔
2	Cardholder Name / Prop Number	Lo to Hi 主	Group Sort	• 1		0 🕂
з	Region	Lo to Hi 🗾	Hidden	•	<u>(88</u> )	555
4	Unit	Lo to Hi 💼	Hidden	•	<del>7.7</del> 98	<u> 275</u>
5	Nessage Status	Lo to Hi 🕂	Hidden	-		(777)

Figure 6-8

Your new, more manageable report should appear similar to Figure 6-9 below. The *Account Number* column is truncated for security.

unt Nu	Cardholder Name / Prop Number
000001	MARY F MAHALOVICH
000001	ROGER MCKENZIE
000001	JEANNE RIEMAN
000005	VICKI GRIMM

Figure 6-9



Finally, save your report by clicking on , selecting a computer or the database for storing your report (Figure 6-10), and saving this report as *Unread Messages* (Figure 6-11).

	H. Committee
	My Computer
9	Database
o save	a workbook to your database account, click Save.
0.0010	

Figure 6-10

Available workbooks: 2500 and Over	
Account Numbers	
Check Transactions Exercise #2	
Exercise #2 Regions	
Units - Region 01	
Units - Region 05	
Units - Region 08	
Units - Region 1	
Units - Region 10	
Units - Region 19	•
Jame:	
Unread Messages	

Figure 6-11

**Summary.** In this lesson/exercise, you successfully created a report identifying PCMS Users with Unread Messages. In the next and final lesson/exercise, you'll create a report to display disputed transactions, sorted by account number.





# Exercise 7: Group Sorts & Editing Results

## Lesson Description

The exercise in Lesson 7 creates a report that displays unread Disputed Transactions sorted by *Account Number*.

### Training Objectives

At the conclusion of this lesson, PCMS Area Program Coordinators and Local Area Program Coordinators will be able to:

- 1. Add Group Sort options while creating the initial query/report in Workbook Wizard.
- 2. Edit text properties and column size in the initial query results set.

#### <u>Methodology</u>

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

References. None.

Enclosures. None.



Preparation. Using your PCMS Username, log on to Discoverer.

		Connect
VIL.	Username:	Cancel
CY-	Password:	Help
$\mathcal{Y}$	Connect: Jpcmsprod	About
Discoverer Release 3.1 ORACLE	Please enter your username, passwor	d and the database name.

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

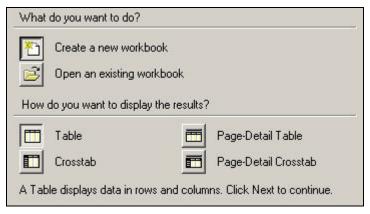


Figure 7-2



**<u>Step 2</u>**. Next, open the *Transaction Dispute* folder from the *Available* column on the left, by clicking on the **F**.

Select the following fields:

- 1. Dispute Code
- 2. Amount
- 3. Dispute Date
- 4. Description
- 5. *Resolved Date*

🖅 🛄 Card Transaction



Next, open the *Credit Card* folder from the *Available* column on the left, by clicking on the  $\blacksquare$ . Select the following fields:

- 1. Region
- 2. Unit
- 3. Sub Unit
- 4. Account Number
- 5. Transaction Amount
- 6. Merchant Name
- 7. Purchase Date
- 8. Program Code

When this action is completed, the *Selected* column on the right-hand side of the page should appear like Figure 7-6. If yes, click to proceed.



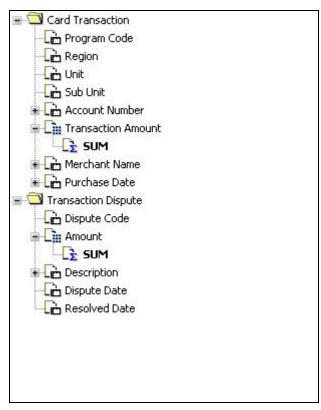


Figure 7-6

**<u>Step 3</u>**. No customization of the layout of the report is required, so click wext and proceed to the next Workbook Wizard page.

**Step 4.** To set the conditions for your query/report, click the  $\square$  next to *All Items*. Once again, depending on the permissions granted to your Username, you may want to set conditions for *Region*, *Unit* and *Sub Unit* as done in previous lessons, to limit the size of the results set returned. When completed, click  $\square$  and proceed to the next Workbook Wizard page.



**<u>Step 5.</u>** To add a new *Group Sort*, click <u>Add</u>. Add a *Group Sort* to *Account Number*, and select the *Hidden* option for *Region*, *Unit*, and *Sub Unit*. See Figure 7-7.

	Column		Direction	Group	Line	Spaces
1	1.44	Account Number	Lo to Hi	Group Sort	• 1 •	0
2	2 441	Region	Lo to Hi 🔹	Hidden	· ···	10000
3	1/44/2	Unit	Lo to Hi 📩	Hidden	•	
4		Sub Unit	Lo to Hi	Hidden	•	2000



Your query/report is ready to run. Click on Finish and your report will appear. Your results set table should appear similar to Figure 7-8 below.

	Discoverer - [Disp																			B	
🔎 File E	dit View Sheet	Format Tools G	raph Window	Help															_		×
🔕 🧀	🖬 🖹 🖪		Z 🗩 🕯	3 4	2	1 X1 🖷															
[m						- 3	1 -		0 00												
Tr Arial		• 10	• B	ć∐		≣ 黔	6	<u>ه</u>	0 00	i.	H°.	₽.									
	Dispute Code	Amount SUM															D	escripti	on		
▶ 1	11	-\$3.71	Was accid	ental key	punching	error, when	re I hit "I	D" inste	ead of	"A" for	r appro	ving. V	Vas	never	intende	d to be	disput	ed to be	egin wit	th.	
►2	11	20 V 75 ( 20 V 7	SALES TA	K OF \$38	1.05 HAS 1	NEVER BE	EN CR	EDITED	D.										~ ~ ~ ~		
<b>⊳</b> 3	3A	\$3.71																			
▶ 4	9A	25 AVA 28 AVA	THIS WAS		Concerning on the second			0.57													
▶5	6		THE SALE																	_	
▶6	1		7/8 - Check		<ol> <li>A Defective to the set of the s</li></ol>		•	100 - 10 - 10 - 10 - 10 - 10 - 10 - 10	X 2.64 1.8		Well-show with	n so store sen se	2007-00-00	1		line tick	ets. C	alled S	W Air t	to cł	ŀ
▶7	1	\$403.00	7/8-card us	ed for pla	ane tickets	s, unauthori	ized. C	ard has	s been	cance	lled an	ıd bank	sec	urity r	otified.	1					
⊁8	1	\$403.00	7/8-Card us	ed for pla	ane ticket,	, unauthoriz	zed use.	Card	has be	een ca	ncelled	d and re	eport	ed to	bank s	ecurity.					
▶9	ЗА		Ordered in			e Rio Gran	de Natio	nal Fo	rest. I	called	l my si	uperviso	or an	d the	purcha	sing age	ent on t	the RGI	VF and	I the	
<b>⊮</b> 10	ЗА	\$63.00	UNKNOWN	I AMOUN	VT																
<mark>▶</mark> 11	ЗA	\$16.58	UNKNOWN	I AMOUN	NT.																
▶ 12	2	\$377.22	PREVIOUS	LY PAID	DATE OF	F PURCHA	SE 08-2	1-2001	E.												
▶ 13	ЗA	\$1,141.91																			
For Help, pre	Sheet 1 /			] 4															NUM	Þ	•

Figure 7-8





Note that the *Description* column of your initial results set is extremely long. To reformat this column and improve the readability of your report, click on the *Description* column heading. This action will select the entire column for editing actions.

Next, right-mouse click anywhere on the highlighted (*Description*) column. This action will call a menu of options to edit the column. See Figure (7-9). Select *Format Data*.

actions & found	Item Properties	This is not
ne tickets, uns ine ticket, una re Heft the Rio	Cut Copy Delete	en cancelled been cance I called my
IT IT	Format Data Format Heading Format Exception	
DATE OF PU	Column Width Column Auto Size	
	Group Sort Sort Low to High Sort High to Low	
	Show Values	

Figure 7-9



The *Format Data* window will appear. Click on the *Alignment* tab, and then click the *Wrap Text* checkbox as shown in Figure 7-10 below.

Font	Alignment	Background Color Te	ext
		- Horizontal	Vertical
		Elft	🐨 Top
		C Center	C Center
		C Right	C Bottom
		🔽 Wrap Text	
		Sample AaBbCcYyZz	

Figure 7-10

Next, click Apply and K. To adjust the width of the column, place your cursor on the column margin, hold down the right-hand mouse button, and adjust the column margin by sliding the mouse to the right or left. See Figure 7-11 below. Text within the column will automatically wrap to fit the space available.

Amount SUM Description Dispute Date
-------------------------------------

Figure 7-11



Your altered result set should look similar to Figure 7-13 below. Note that the column length has been significantly reduced from your initial results set, the longer text strings in *Description* are wrapped within the column, and that other adjacent columns can now be viewed without using the horizontal scroll bar at the bottom of the screen. Continue to adjust your results display until the appearance meets with your satisfaction.

	Dispute Code	Amount SUM	Description	Dispute Date	► Resolved Date	4
1	11	-\$3.71	Was accidental key punching error, where I hit "D" instead of "A" for approving. Was never intended to be disputed to begin with. Please re-credit the merchant.	03/05/2002 12:00 am	03/01/2002	OI
2	11	\$750.38	SALES TAX OF \$38.05 HAS NEVER BEEN CREDITED.	05/28/1999 12:00 am		Τ-
3	ЗА	\$3.71		02/01/2002 12:00 am		T
4	9A	\$100.00	THIS WAS CANCELLED PRIOR TO HAPPENING.	05/28/1999 12:00 am		
▶5	6	\$137.81	THE SALES TAX HAS BEEN CREDITED ON THIS INVOICE, BUT THE LAMINATOR WAS QUOTED A PRICE \$99.99 NOT THIS HIGHER INVOICE PRICE. I CALLED TO GET CREDIT, BUT IT STILL HAS BEEN RECEIVED.	05/28/1999 12:00 am		
▶6	1	\$395.50	7/8 - Checked transactions & found charge for SW Air, 7/2. This is not valid, I did not authorize airline tickets. Called SW Air to check who used my CC and Dana told me it was used for 2 tickets on 7/3 also. She faxed me copies.	07/08/2002 12:00 am		0
▶7	1	\$403.00	7/8-card used for plane tickets, unauthorized. Card has been cancelled and bank security notified.	07/09/2002 12:00 am	07/30/2002	T
▶8	1	\$403.00	7/8-Card used for plane ticket, unauthorized use. Card has been cancelled and reported to bank security.	07/09/2002 12:00 am	07/30/2002	T
9	ЗА	\$22.20	Ordered in May-before I left the Rio Grande National Forest. I called my supervisor and the purchasing agent on the RGNF and they told me they have not received the merchandise. I have called Staples and they are checking on it.	12/04/2002 12:00 am		OI
▶ 10	ЗА	\$63.00	UNKNOWN AMOUNT	10/26/2001 12:00 am		0
▶ 11	ЗА	\$16.58	UNKNOWN AMOUNT	09/19/2001 12:00 am	10/31/2001	+
▶ 12	2	\$377.22	PREVIOUSLY PAID DATE OF PURCHASE 08-21-2001	09/19/2001 12:00 am	10/31/2001	
<mark>▶</mark> 13	3A	\$1,141.91		10/31/2001 12:00 am	10/31/2001	T

Figure 7-13



Finally, save your report by clicking on , selecting a computer or the database for storing your report (Figure 7-14), and saving this report as *Dispute Report* (Figure 7-15).

My Computer Database	
	o save a workbook to your database account, click Save.

Figure 7-14

Available workbooks: 2500 and Over		
Account Numbers		
Check Transactions		
Dispute Report		
Exercise #2 Regions		
Units - Region 01		
Units - Region 05		
Units - Region 08		
Units - Region 1		
Units - Region 10		
Name:		
Dispute Report		
Save	Cancel	Help

Figure 7-15

**Summary.** In this lesson/exercise, you successfully created a report containing detailed information on Disputes. In the next and final lesson/exercise, you'll learn to share reports with other users, and to delete obsolete reports from the database.





# Exercise 8: Sharing or Deleting Reports

## Lesson Description

Lesson 8 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, PCMS Area Program Coordinators and Local Area 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.



Workbook Wizard

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

Connect to Oracle Disc	overer	×
	Connection	Connect
	Password:	Cancel
63-		Help
	Connect: pcmsprod	About
	_ Status	
Discoverer™ Release 3.1 ORACLE	Please enter your username, password and the d	latabase name.

Figure 8-1

## **Sharing Workbooks**

When logging into Oracle Discoverer, the first Workbook Wizard page will automatically appear. Close this page by clicking on the  $\bowtie$  in the upper right-hand corner. See Figure 8-2 below.

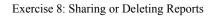
Figure 8-2

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

File Edit View Tools Help			
New Open Import SQL	Ctrl+N Ctrl+O		EE 24 74
Manage Workbooks Connect to Database			ing Manager
1 Exercise 8 2 Fuel Purchases by Merchant:da014@pcmsprod 3 Exercise 7 4 Crosstab & Graph:da014@pcmsprod			<u>+</u>
Ext			



\_ 🗆 🗙





Workbook -> User   Wor	User -> Workbook <book: 2500="" and="" over<="" th=""><th></th><th></th></book:>		
Users Available AM010 AM010F AM025 AM053 AM053A AM053A AM053F AM053F AM058 AM058 AM083 AM1000 AM1001	Add>   		
		OK Cancel	Help

This action will open the Share Workbooks window. See Figure 8-4.

Figure 8-4

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 8-5) by clicking on  $\square$  and selecting the report by name.

Workbook	2500 and Over	-
WOINDOOK.	2000 and 0 ver	

Figure 8-5



Next, select a single user by clicking on their User ID from *Available* list in the *Users* window. See Figure 8-6.

M010 M010F	<b>_</b>	
M025 M037 M052		
(M053 (M053A (M053F	> Add >	
M056 M058	< Delete <	
M083 M1000 M1001	=1	

Figure 8-6

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  $\xrightarrow{Add}$ , and the user name(s) will be moved to the Shared list. Then click  $\xrightarrow{OK}$ , 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 8-7)

Share Workbooks		×
Workbook -> User User ->	Workbook	
User: A	M010	<b>•</b>
- Workbooks		
Available	Shar	ed
2500 and Over Account Numbers Accounting Report Check Transactions Crosstab & Graph Date Ranges and Colun- Dispute Report Exercise #2 Fleet Test Query Fuel Purchase by Quark Fuel Purchase by Quark	> Add > < Delete <	
	OK	Cancel Help

Figure 8-7



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

User:	AM010	-
	Figure 8-8	

Once you've identified a User, select a report or multiple reports from the Available list, and click Add > Add > Click (See Figure 8-9), which will return you to the *Share Workbooks* window. Click K and the report or reports you selected are immediately available to the User selected.

Available 2500 and Over	Shared	
Account Numbers		
Accounting Report		
Check Transactions		
Crosstab & Graph Date Ranges and Colun	> Add >	
Dispute Report		
Exercise #2	< Delete <	
Fleet Test Query	S D DIDID S	
Fuel Purchase by Quart		
Fuel Purchase by Quart		

Figure 8-9



# **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.

Dispute Report Exercise #2 Fleet Test Query			2
Fuel Purchase by 0 Fuel Purchase by 0			
Fuel Purchases by			
Message Report Prop-Voyager Num	here		
Regions		 	
Units - Region 01 Units - Region 05			
Units - Region 08 Units - Region 1			

Figure 8-10

Click on the report or reports you wish to delete, and then click on <u>Delete</u>. 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 *PCMS 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.