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

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 

.

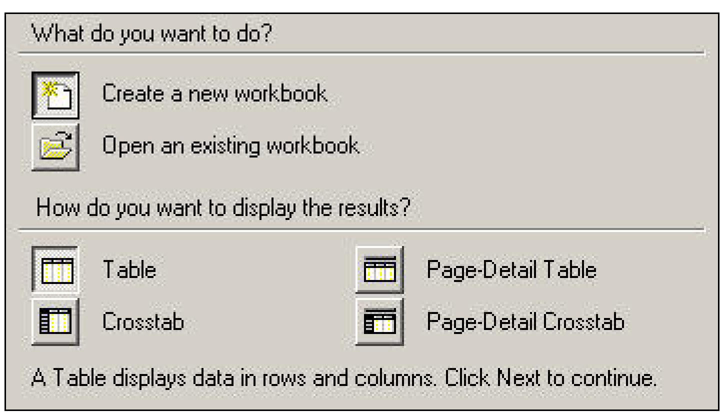


Figure 6-2

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

Figure 6-3

Select the following fields:

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

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.

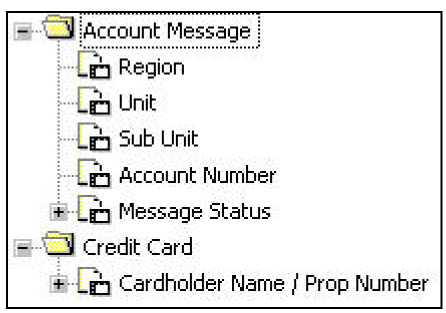


Figure 6-5

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

<u>Step 4</u>. To set the conditions for your query/report, click the 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 . In the *Condition* field of the *New Condition* window, click to open the drop-down list of conditional operators. Select the Equal Sign *(=)* conditional operator, enter *'U'* in the *Value(s)* field, and click . See Figure 6-6 below.

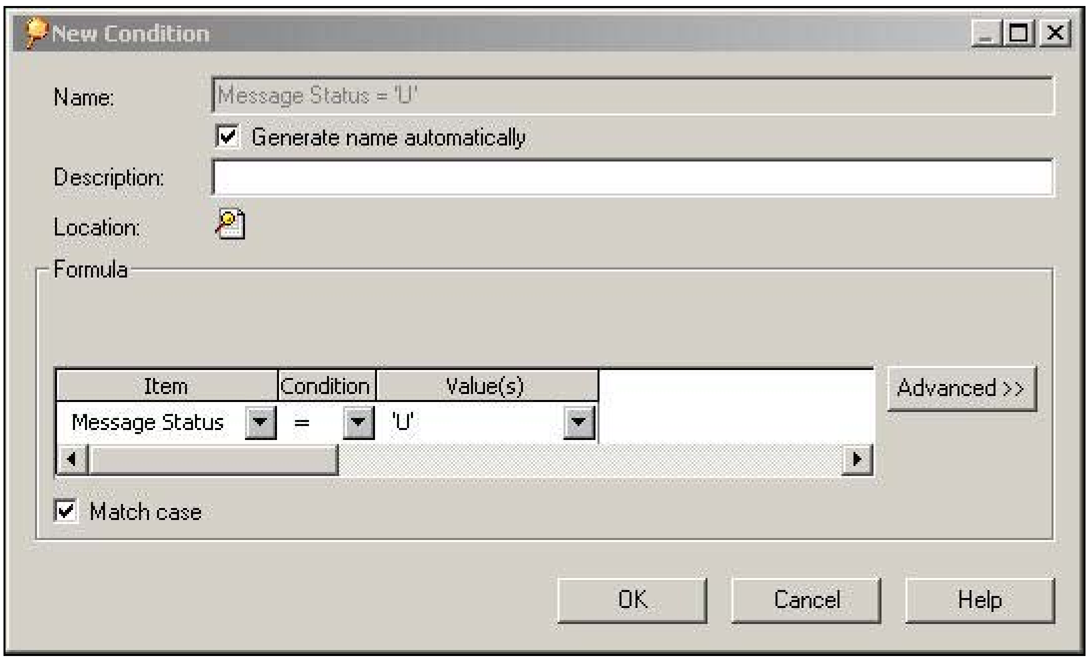


Figure 6-6

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.

	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	U	DEBBIE GOIN
29	01	05	00000	002006	U	DERICK 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	Group Sort	1 ——	0
3	Region	Lo to Hi	Hidden	---	---
4	Unit	Lo to Hi	Hidden	---	---
5	Message Status	Lo to Hi	Hidden	---	---

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).

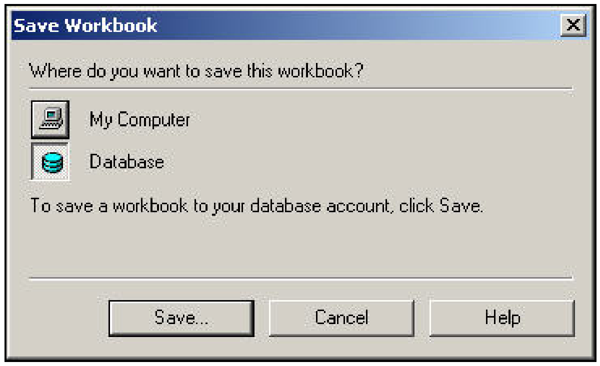


Figure 6-10

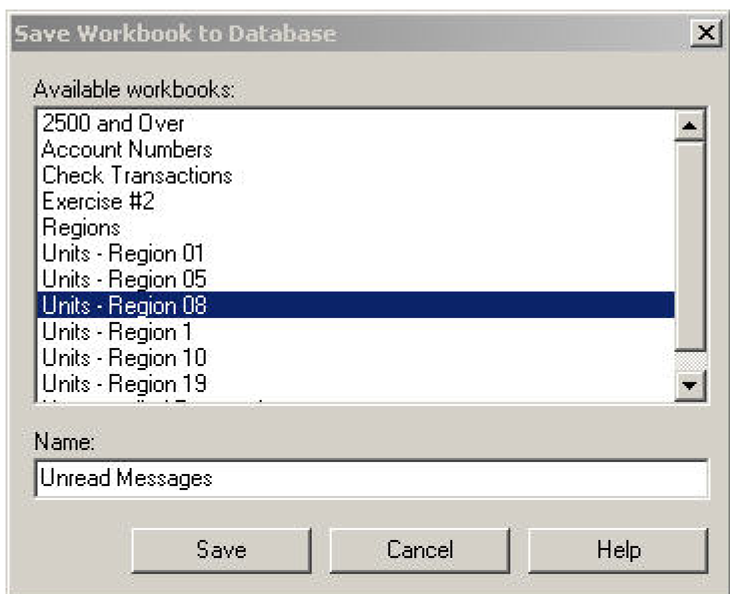


Figure 6-11

<u>**Summary**</u>**.** 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.

Methodology

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

References. None.

Enclosures. None.

Preparation. Using your PCMS 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 

.

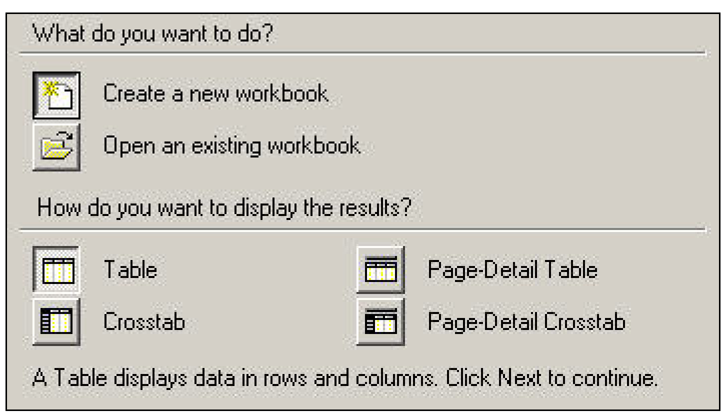


Figure 7-2

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

Figure 7-3

Select the following fields:

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

Figure 7-4

Next, open the *Credit Card* folder from the *Available* column on the left, by clicking on the ⊞. 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 Next > to proceed.

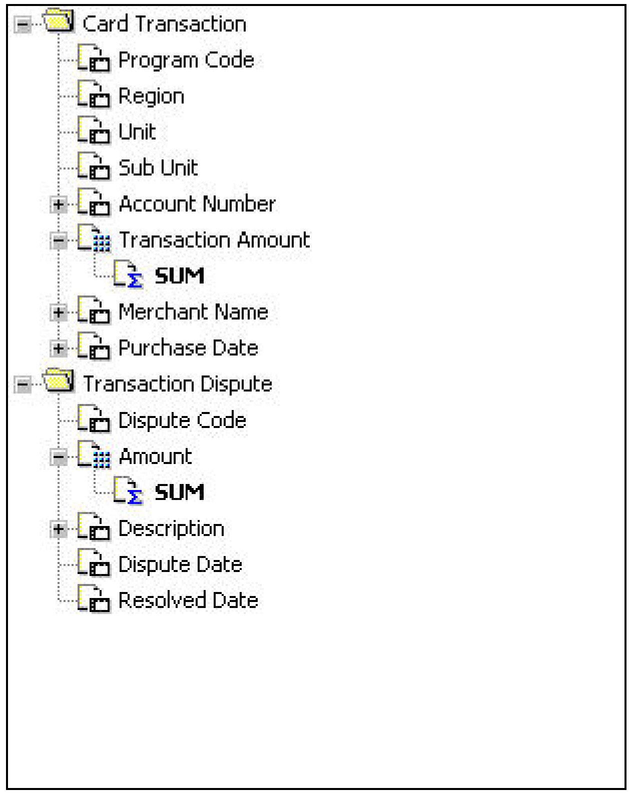


Figure 7-6

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

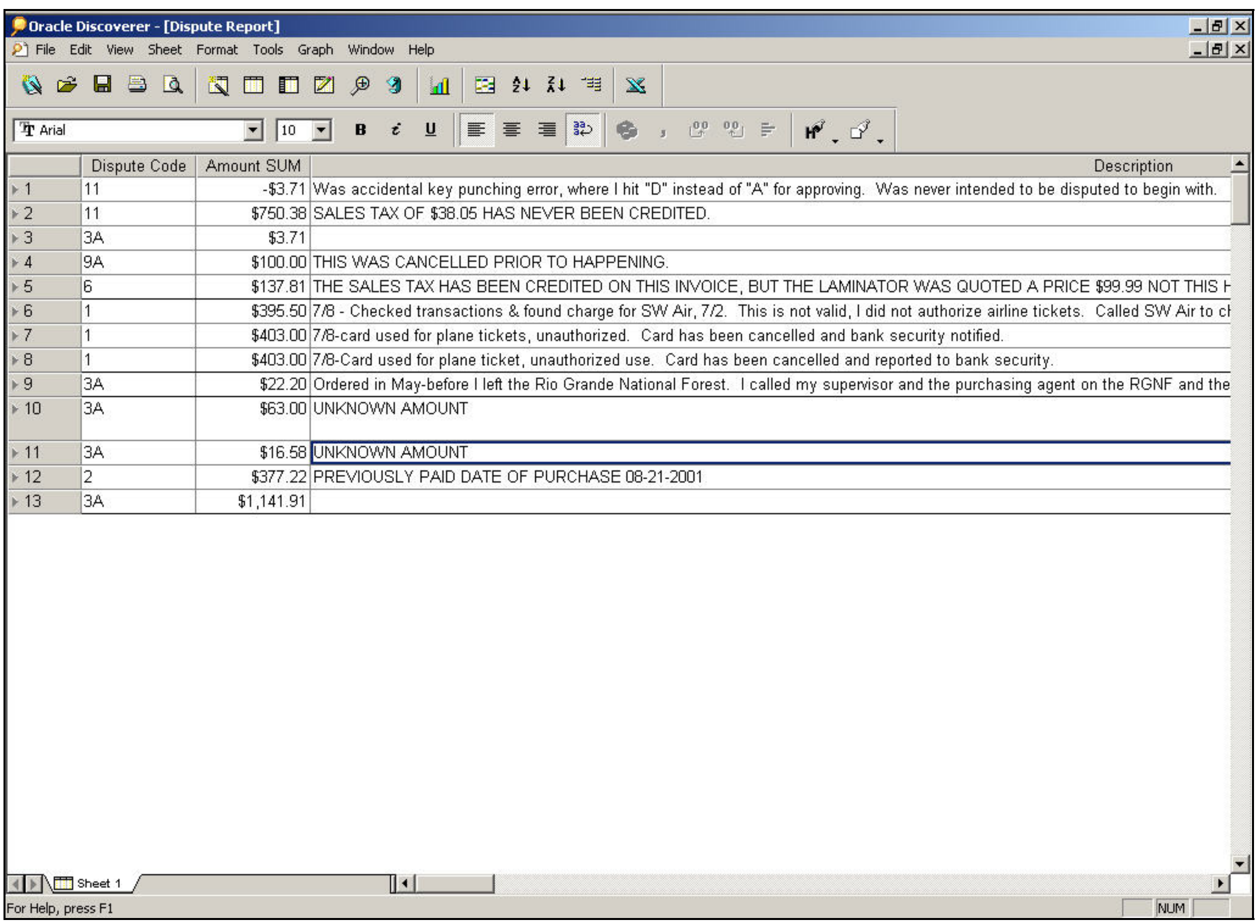
Step 4. To set the conditions for your query/report, click the next to *All Items*. Once again, depending on the permissions granted to your Username, you may want to set conditions for *Region*, *Unit* and *Sub Unit* as done in previous lessons, to limit the size of the results set returned. When completed,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

Step 5. To add a new *Group Sort*, click Add . 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	*Account Number*	Lo to Hi	Group Sort	1	0
2	Region	Lo to Hi	Hidden	---	---
3	Unit	Lo to Hi	Hidden	---	---
4	Sub Unit	Lo to Hi	Hidden	---	---

Figure 7-7

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.



	Dispute Code	Amount SUM	Description
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.
2	11	$750.38	SALES TAX OF $38.05 HAS NEVER BEEN CREDITED.
3	3A	$3.71	
4	9A	$100.00	THIS WAS CANCELLED PRIOR TO HAPPENING.
5	6	$137.81	THE SALES TAX HAS BEEN CREDITED ON THIS INVOICE, BUT THE LAMINATOR WAS QUOTED A PRICE $99.99 NOT THIS H
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 cl
7	1	$403.00	7/8-card used for plane tickets, unauthorized. Card has been cancelled and bank security notified.
8	1	$403.00	7/8-Card used for plane ticket, unauthorized use. Card has been cancelled and reported to bank security.
9	3A	$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 the
10	3A	$63.00	UNKNOWN AMOUNT
11	3A	$16.58	UNKNOWN AMOUNT
12	2	$377.22	PREVIOUSLY PAID DATE OF PURCHASE 08-21-2001
13	3A	$1,141.91	

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*.

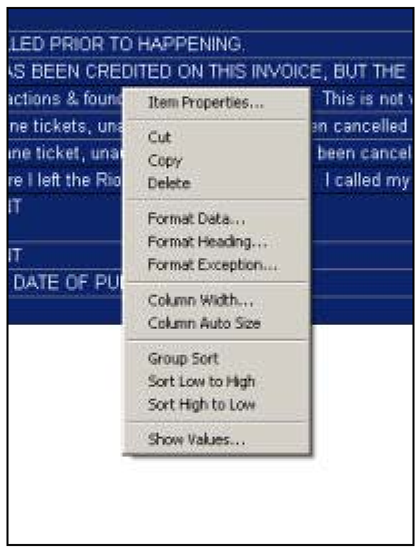


Figure 7-9

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.

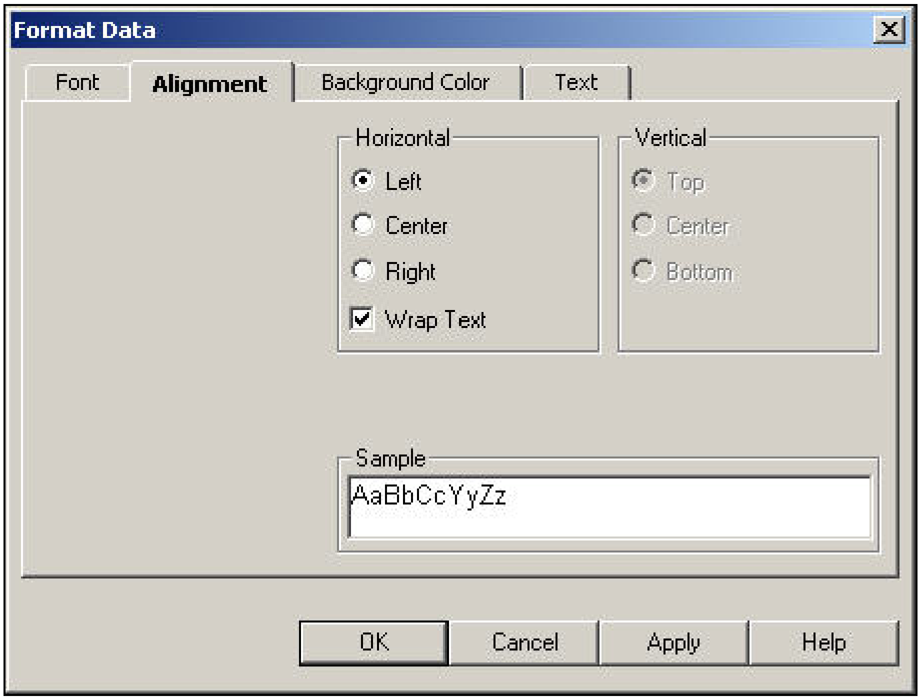


Figure 7-10

Next, click Apply and OK. 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.

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	U
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	0
2	11	$750.38	SALES TAX OF $38.05 HAS NEVER BEEN CREDITED.	05/28/1999 12:00 am		
3	3A	$3.71		02/01/2002 12:00 am		
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	
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	
9	3A	$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		0
10	3A	$63.00	UNKNOWN AMOUNT	10/26/2001 12:00 am		0
11	3A	$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	
13	3A	$1,141.91		10/31/2001 12:00 am	10/31/2001	

Sheet 1

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).

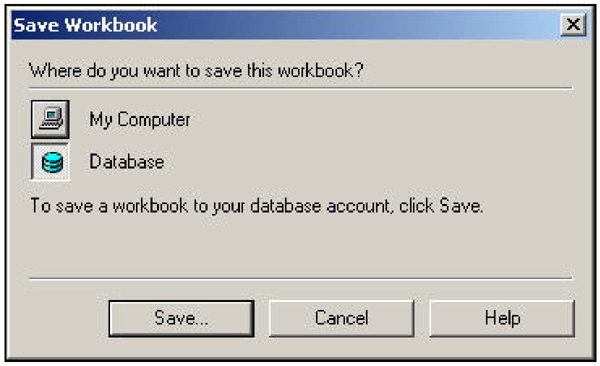


Figure 7-14

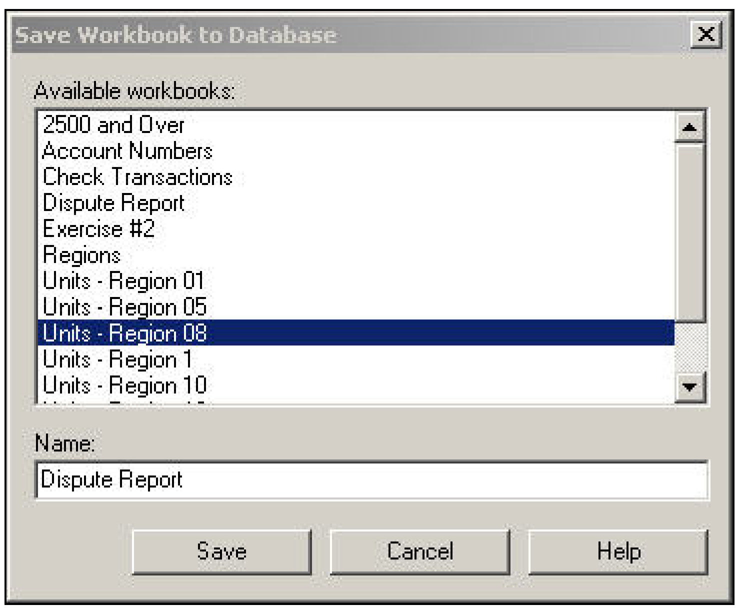


Figure 7-15

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.

Preparation. Using your Fleet Username, log on to Discoverer

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 ☒ 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*.

Figure 8-3

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

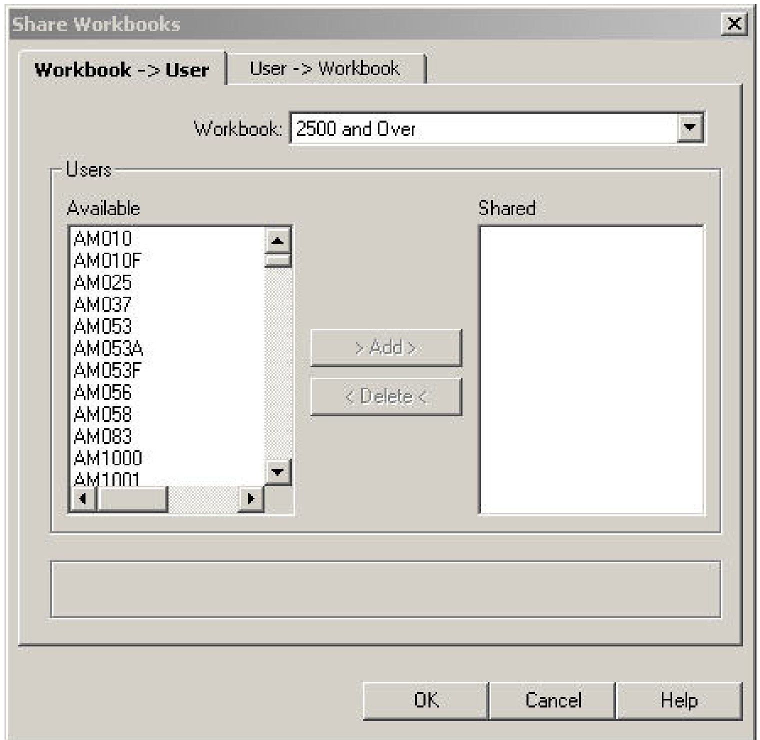


Figure 8-4

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 ▼ and selecting the report by name.

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.

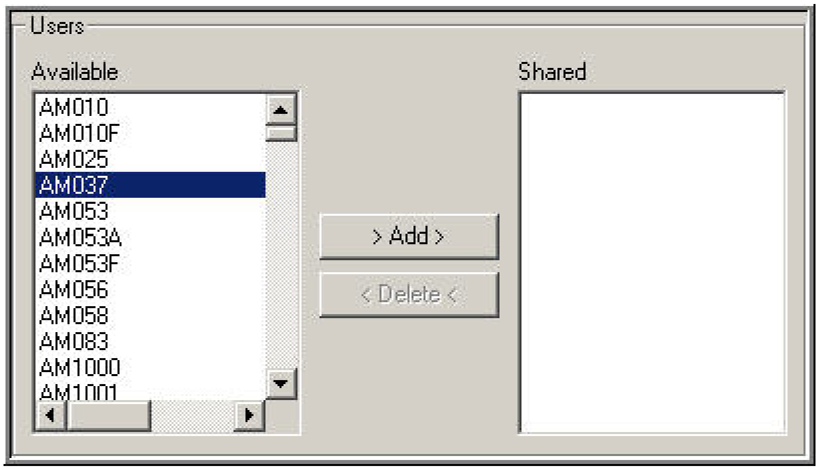


Figure 8-6

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  , 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 8-7)

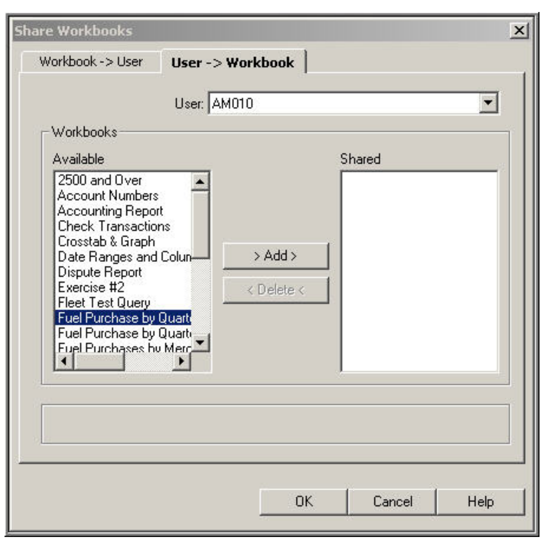


Figure 8-7

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

Figure 8-8

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

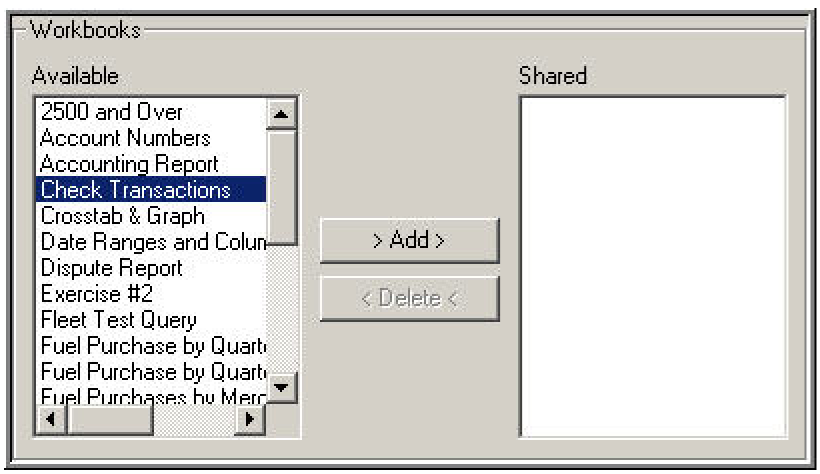


Figure 8-9

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.

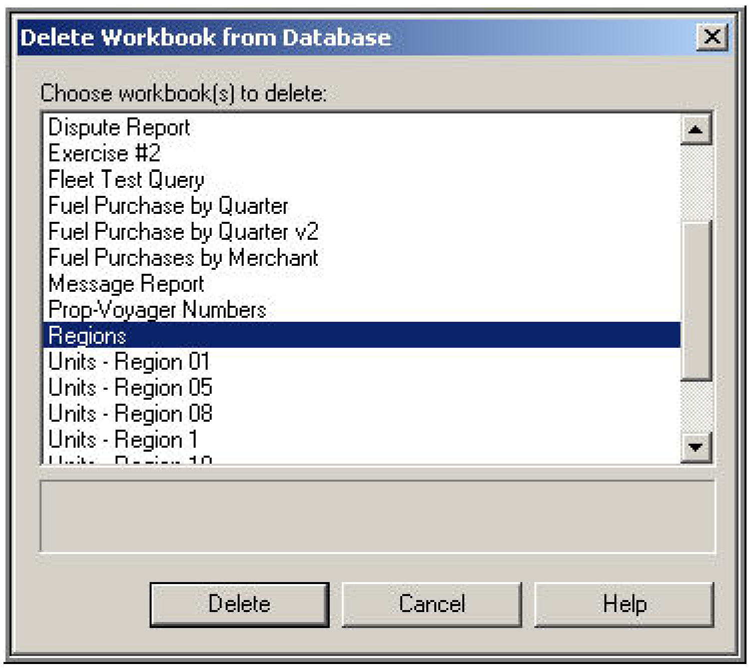


Figure 8-10

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 *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.