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.
**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](image)

Following the Oracle Discoverer Start-Up Banner, you’ll see Log In Window shown below in Figure 1-1.

![Figure 1-2](image)

Enter your assigned Username, Password, the Connect string or database name you need to access, and click on the button.
Exercise 1: Accessing Oracle Discoverer

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

![Workbook Wizard Window](image)

**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 1 through 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.

![Workbook Wizard](image)

Figure 2-1
Exercise 2: Creating a Report

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 have six (6) navigation buttons, located at the bottom of the window. See Figure 2-2.

<table>
<thead>
<tr>
<th>Figure 2-2</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt; Back</code></td>
<td>The ‘Back’ button returns the Workbook Wizard to the previous screen. When you are on the first Workbook Wizard screen, this button is inactive (gray).</td>
</tr>
<tr>
<td><code>Next&gt;</code></td>
<td>‘Next’ moves Workbook Wizard to the next screen. On the first Workbook Wizard screen, this button is 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.</td>
</tr>
<tr>
<td><code>Options...</code></td>
<td>The ‘Options’ button sets defaults for query format and display settings. This button is inactive (gray) on the initial Workbook Wizard screen.</td>
</tr>
<tr>
<td><code>Finish</code></td>
<td>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.</td>
</tr>
<tr>
<td><code>Cancel</code></td>
<td>Use ‘Cancel’ to cancel the current task or step.</td>
</tr>
<tr>
<td><code>Help</code></td>
<td>This button opens a help file on using the Discoverer Workbook Wizard.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Figure 2-3</th>
<th>Table</th>
<th>Page-Detail Table</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Crosstab</td>
<td>Page-Detail Crosstab</td>
</tr>
</tbody>
</table>

* A Table displays data in rows and columns. Click Next to continue.
Exercise 2: Creating a Report

Click on [Table] 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] by clicking on [PCMS/FLEET], 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.

![Cardholder folder](image)

**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)

![List of items](image)

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

![Workbook Wizard: Step 3](image)

**Figure 2-8**

**Step 3.** 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.
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:** for the drop-down list as shown in Figure 2-9 below, and select **Region**.
Next, click \[\text{New...}\], and the New Condition window in Figure 2-10, shown below, will appear.

![New Condition Window](image)

The *Condition* field is always an equal sign (=) by default. If you need a different conditional operator when creating a new condition, click \[\text{cell}\] in the *Condition* field.

![Figure 2-11](image)

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

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:
Click on \( \text{View} \) 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.

![Figure 2-15](image)

Discoverer will provide a count of the number of rows and present the result as shown in Figure 2-16 below. Click \( \text{OK} \) to close this window.

![Figure 2-16](image)

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 \( \text{Save} \). 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](image)
Click on or , and you will see one of the following windows (Figure 2-18 or 2-19) appear:

![Figure 2-18](image)

Enter *Account Numbers* in the *File Name* field and click on .
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.