Discoverer Viewer
Report Basics

Updated March 2010

InSITE
Discoverer Viewer Basics
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InSITE
Discoverer Viewer Basics
Objectives

After completing the Discoverer Viewer Basic Course, you should be able to:

- Login to the Discoverer Viewer application

- Open workbooks

- Run report queries

- View results

- Obtain the report in a PDF file for printing or saving

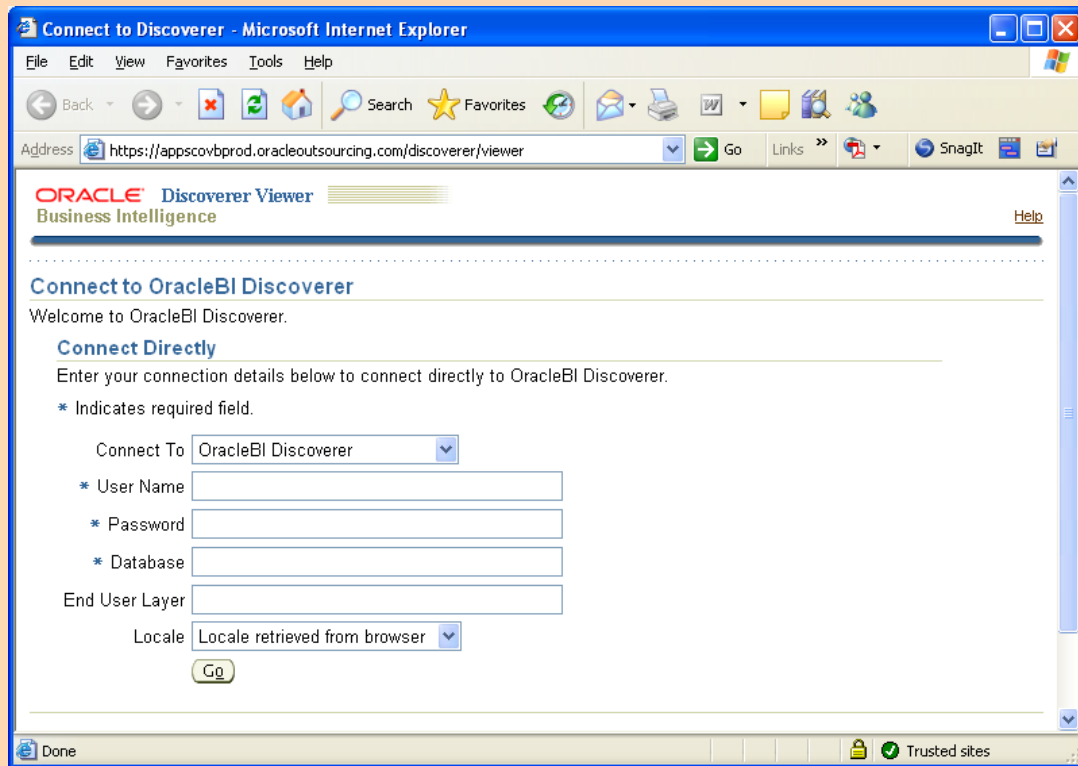- Export report data to Excel

- Send report as email
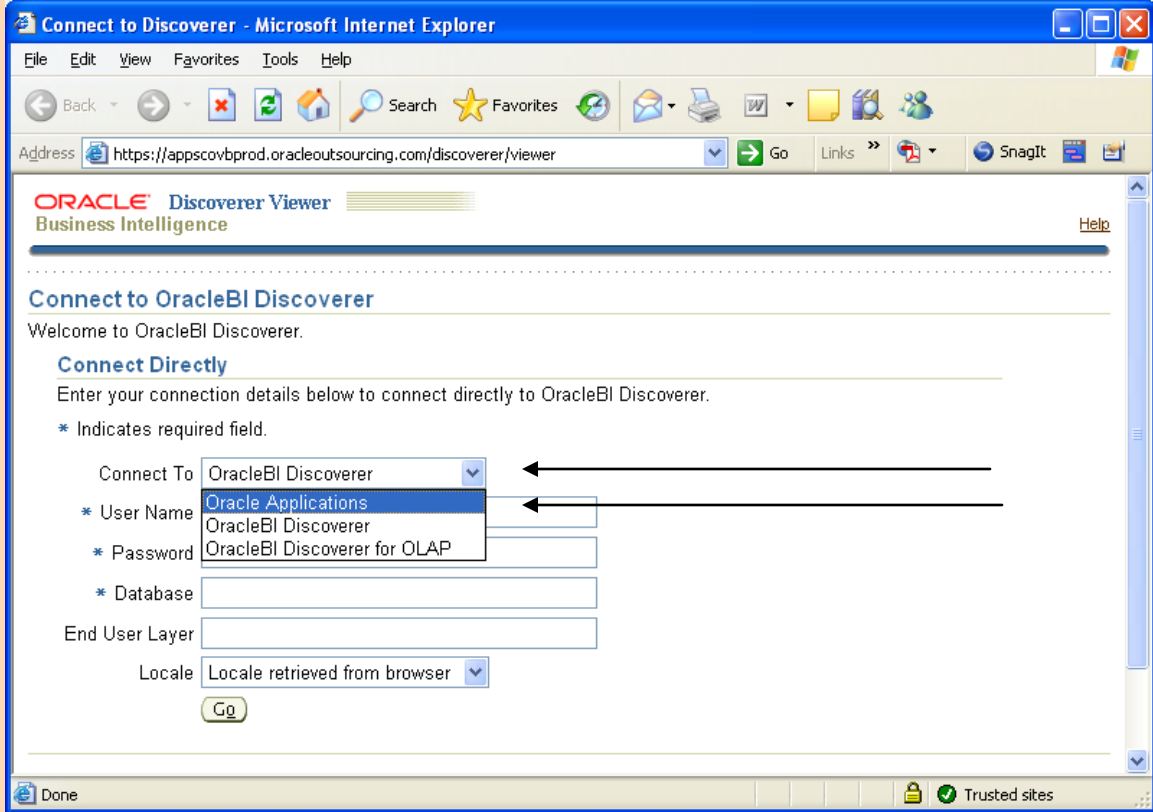
Starting the Discoverer Viewer Application

Accessing the Discoverer Viewer Site

- Open Internet Explorer
  ◊ Start → All Programs → InSITE Discoverer Viewer

Connecting to Oracle Applications

- Click on the drop down arrow in the block labeled "Connect To"

- Select **Oracle Applications**

NOTE: If you do <u>not</u> select Oracle Applications, and if you attempt to connect to OracleBI Discoverer or OracleBI Discoverer for OLAP, you will receive an error message and you will fail to connect.
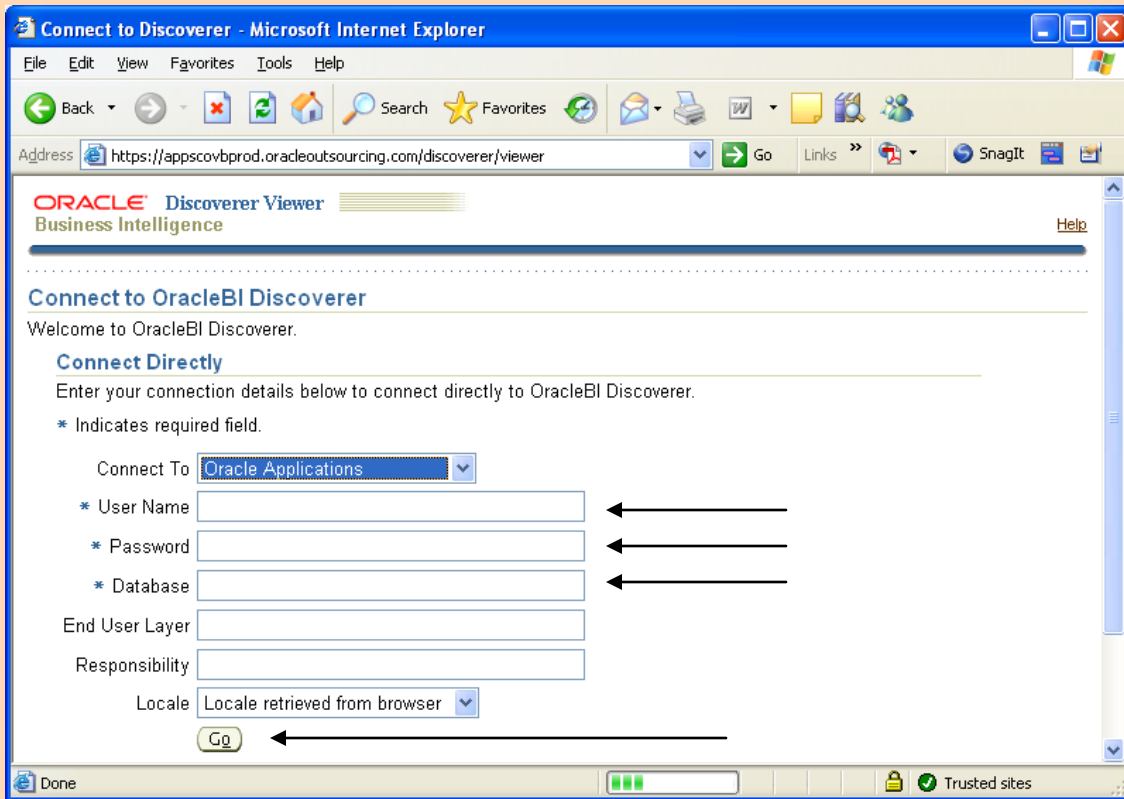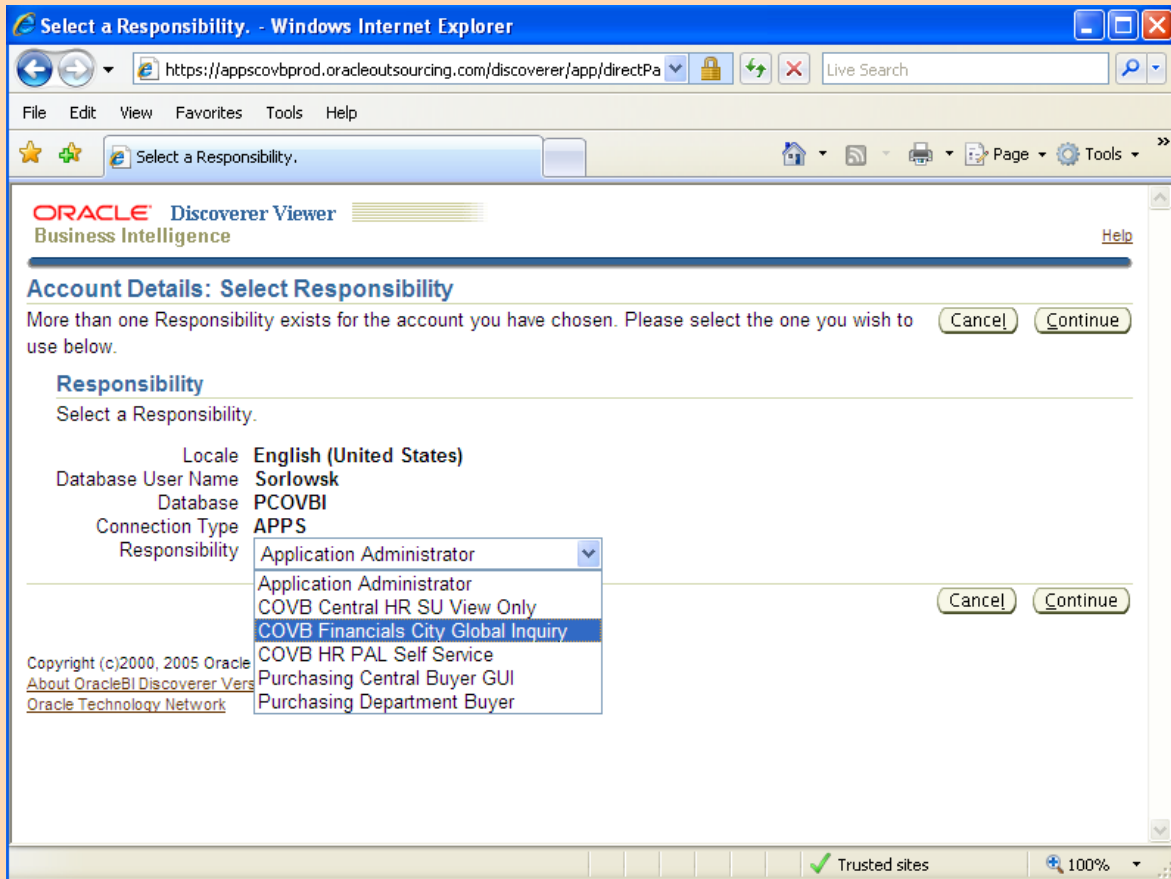
Entering Other Connection Details

After selecting Oracle Applications in the "Connect To" block, then complete the following:

- Enter your user name.

- Enter your InSITE password.

- Enter the database **pcovbi**. *

- Click on the 'Go' button

  * **NOTE: The above pertains to production. During training you will be provided with a training database.**

Completing the Log In

- Select your responsibility.

- Click on the 'Continue' button

Viewing a Discoverer Report

Workbooks and Worksheets

Workbooks contain worksheets. Worksheets contain information retrieved from the database based on a query. If you are familiar with Excel, you can think of a workbook as a spreadsheet (.xls) file, and you can think of worksheets as different sheets within the .xls file.

- Click on the "+" sign to open the workbook of Training Reports

Worksheet List

Search

Type in a search string to find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.

Search [All Workbooks ▼] [_____] (Go)

Result List

(Refresh)

Expand All | Collapse All

Focus	Name	Description	Owner	Last Modified
	▼ Discoverer Workbooks			
⊕	▼ 📄 FIN AP Invoice Dollars and Count		TDONAHUE	Tuesday, July 7, 2009 09:55:07 AM EDT
	By Budget Unit			
	By Project Grant			
⊕	▶ 📘 FIN AP PO Invoice Payments		TDONAHUE	Tuesday, September 15, 2009 12:30:21 PM EDT
⊕	▶ 📘 FIN AP Vendor Invoice Information		TDONAHUE	Tuesday, July 7, 2009 11:17:40 AM EDT
⊕	▶ 📘 FIN GL Budget and PO Carryforwards		TDONAHUE	Tuesday, May 26, 2009 10:55:14 AM EDT
⊕	▶ 📘 FIN GL Funds Available Detail		TDONAHUE	Tuesday, July 7, 2009 03:55:02 PM EDT
⊕	▶ 📘 FIN GL Project Grant Detail		TDONAHUE	Tuesday, July 7, 2009 04:28:42 PM EDT
⊕	▶ 📘 FIN PO Historical PO Account Detail		TDONAHUE	Wednesday, July 8, 2009 12:57:20 PM EDT
⊕	▶ 📘 FIN PO Orders by Project		TDONAHUE	Thursday, September 10, 2009 10:53:32 AM EDT
⊕	▶ 📘 FIN PO Outstanding Orders by PO Prefix		TDONAHUE	Wednesday, August 26, 2009 02:27:09 PM EDT

(Refresh)

Preferences | Exit | Help

Running a Query

Note that the book icon is now open.

- Click on the worksheet name to execute the query.

Running a Query

Parameters Needed window opens

- Click on the flashlight to select the Budget Unit you wish to run.
- All items with an asterisk (*) must have a value in them
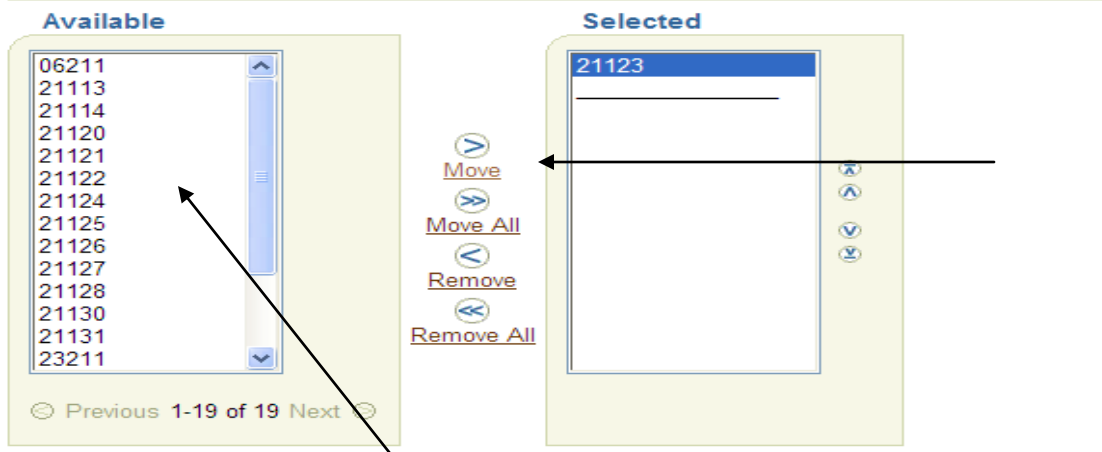
Running a Query

- Move the Budget Unit(s) of the budget(s) to be run to the selected box by highlight-ing and clicking on Move.
- Click on the Select button.

Running a Query

- Click on GO

Query Results

The results of running the query are displayed.

- To select another Worksheet available in the Workbook click on the Worksheet name and the system will automatically process the Worksheet.

- To print the report, click on 'Printable page'
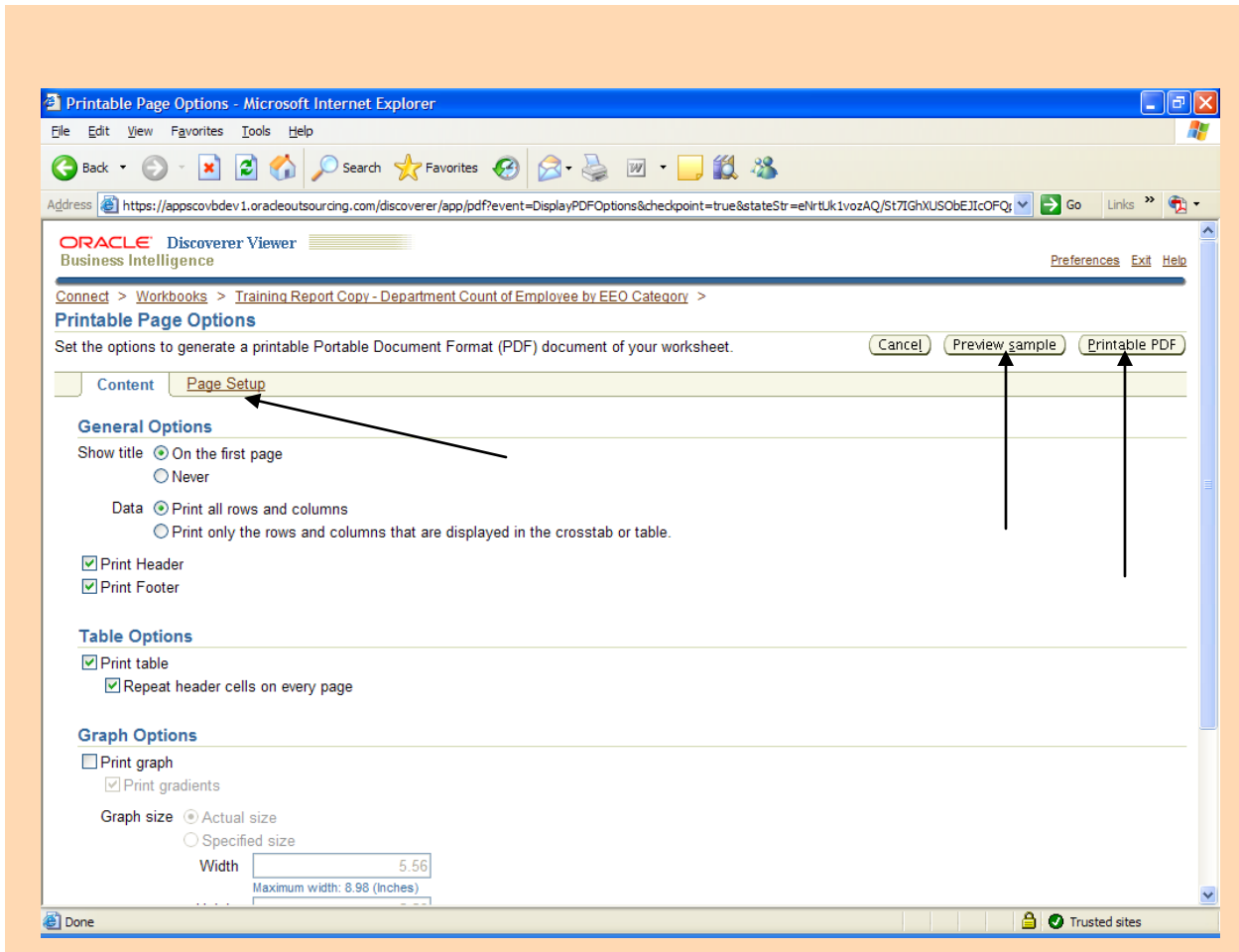
Printable Page Options

Various options for printing the content of the report are presented, such as whether to include titles, headers, footers, etc.

Clicking on 'Page Setup' allows you to set margins, paper size, paper orientation, etc.

Clicking on the 'Preview sample' button will provide an <u>abbreviated</u> version of the report.

- Click on the 'Printable PDF' button, to generate complete .pdf file.
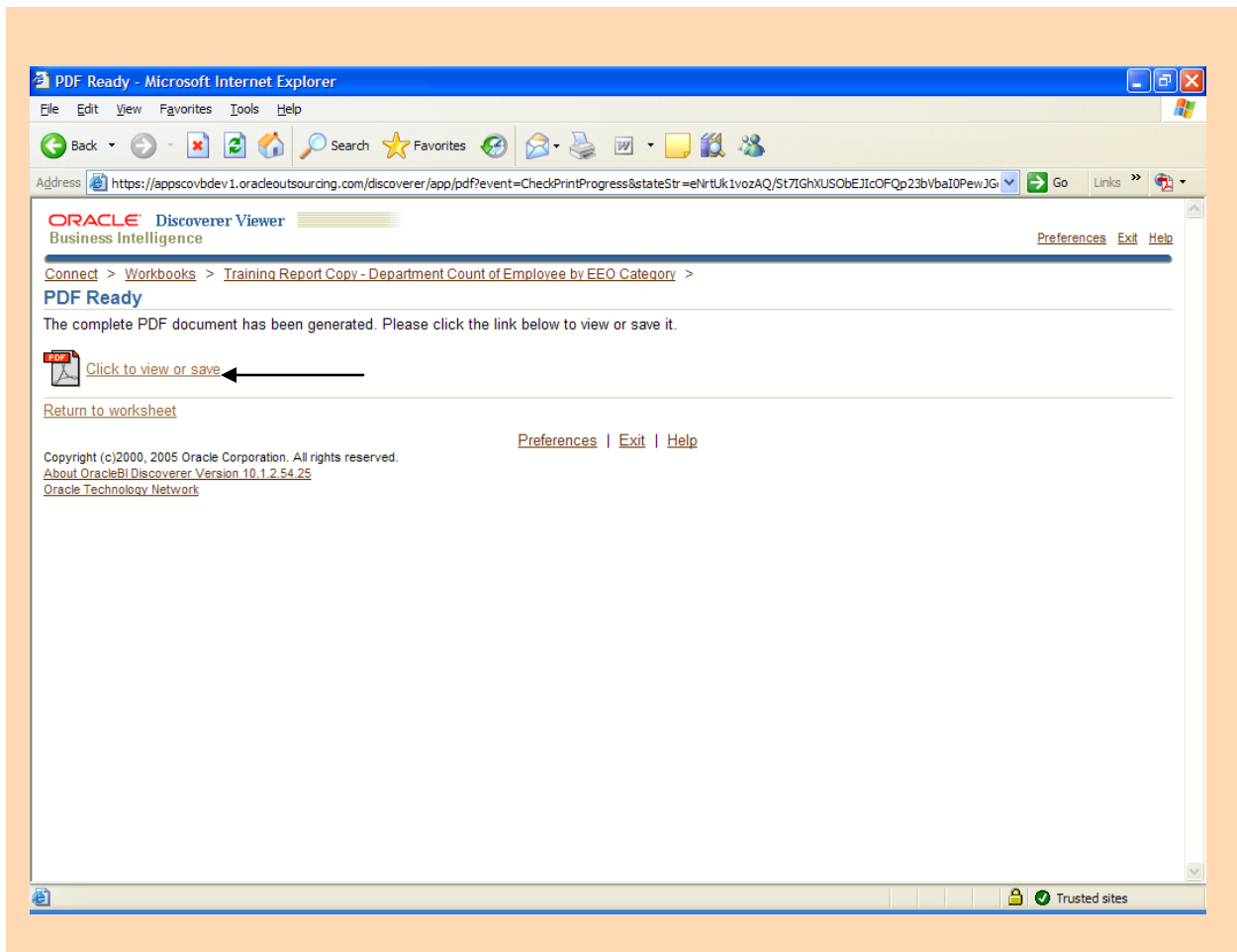
PDF File

By clicking on 'Click to view or save', Adobe Reader will open in a new window. The report may be viewed or saved. After closing Adobe Reader, you may return to the worksheet by clicking on 'Return to worksheet'.

- Click on 'Click to view or save' to launch Adobe Reader.

City of Virginia Beach Comptroller's Division

Invoice Dollar and Count

for Budget Unit : '21123'

Begin Date : '01-FEB-2010' through End Date : '10-MAR-2010'

FIN AP Invoice Dollars and Count

By Budget Unit

10-MAR-10

1

Je Period Name: FEB-10/FY10

Vendor Name	Minority Group	Women Owned	Small Business	Invoice Count	Invoice Debits	Invoice Credits
AMERICAN REGISTRY FOR INTERNET NUMBERS LTD	-	N	N	1	100.00	
BANK OF AMERICA NA	-	N	N	1	825.34	
BAZON-COX & ASSOCIATES INC	DISABLED VET	N	Y	6	2,423.83	
ELECTRONIC SYSTEMS INC	-	N	Y	13	241,424.00	
IBM/INTERNATIONAL BUSINESS MACHINES	-	N	N	1	672.00	
JANTECH SERVICES INC	-	N	Y	1	13,210.00	
MAGNETIC PRODUCTS & SERVICES INC	-	Y	Y	1	5,160.00	
MICROSOFT CORP	-	N	N	2	157,520.00	
NORFOLK WIRE & ELECTRONICS INC	-	N	Y	2	187.75	
SOFTWARE HOUSE INTERNATIONAL(SHI)	Asian American	N	N	1	19,043.45	
SPECTRA LOGIC	-	N	Y	1	20,343.00	
STEALTH SHREDDING INC	-	N	Y	1	14.00	
TREASURER OF VIRGINIA	-	N	N	1	12.58	
VERIZON	-	N	N	3	8,538.95	
VERIZON WIRELESS	-	N	N	1	1,314.16	
				Count: 36	Total Debit Expense: 470,789.06	Total Credits: 0.00

Adobe Reader

The .pdf file may be optionally printed or saved.

- Close this window

- Click on "Return to Worksheet" in order to return to the Worksheet

Exporting a Discoverer Report

Preparing to Export

After opening a workbook and clicking on a worksheet to execute the query, you may export the report to a file.

- To export the report, click on 'Export'
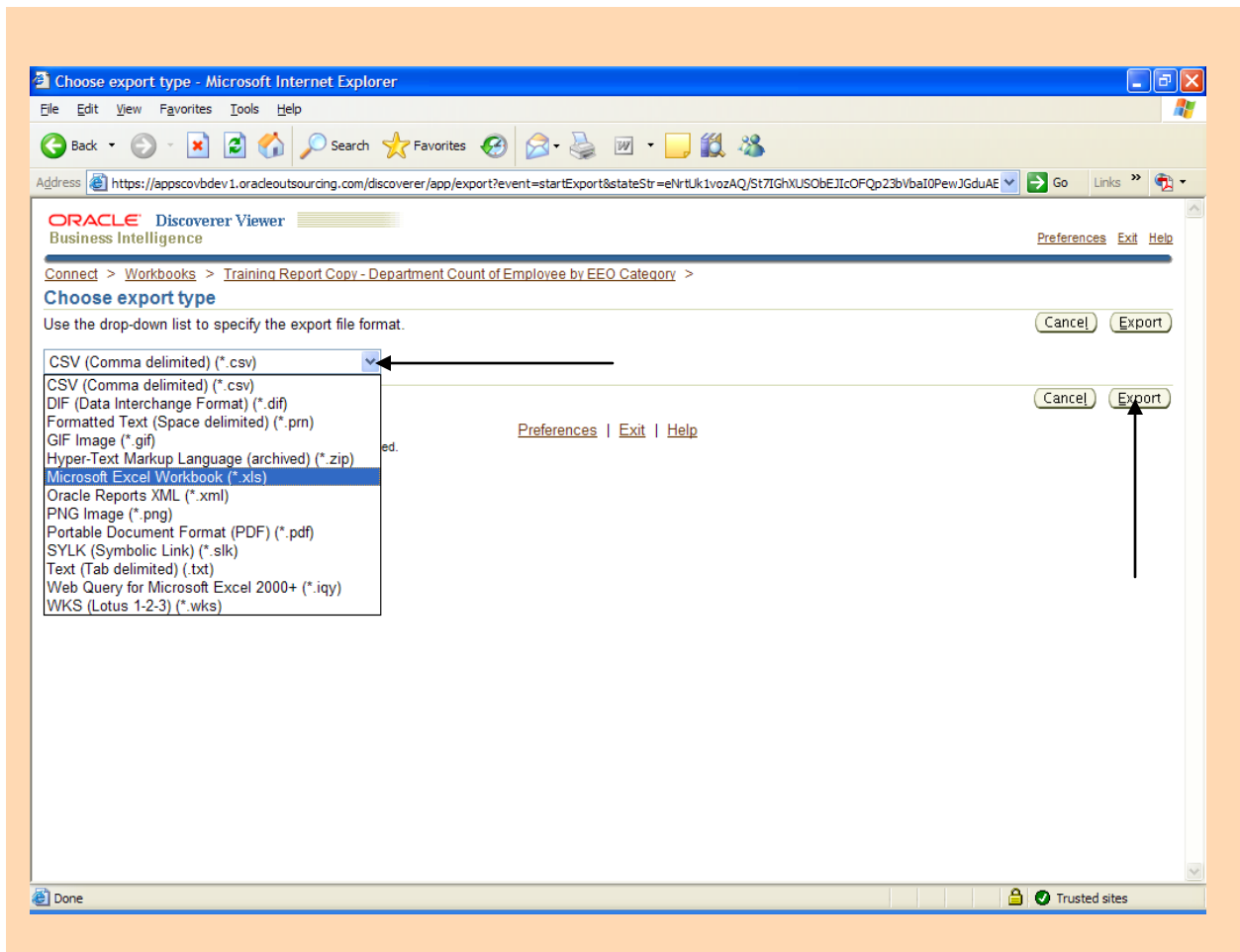
Selecting the Export Type

- Click on the drop down arrow to select the export file format

- Select Microsoft Excel Workbook (*.xls)

- Click on the 'Export' button.
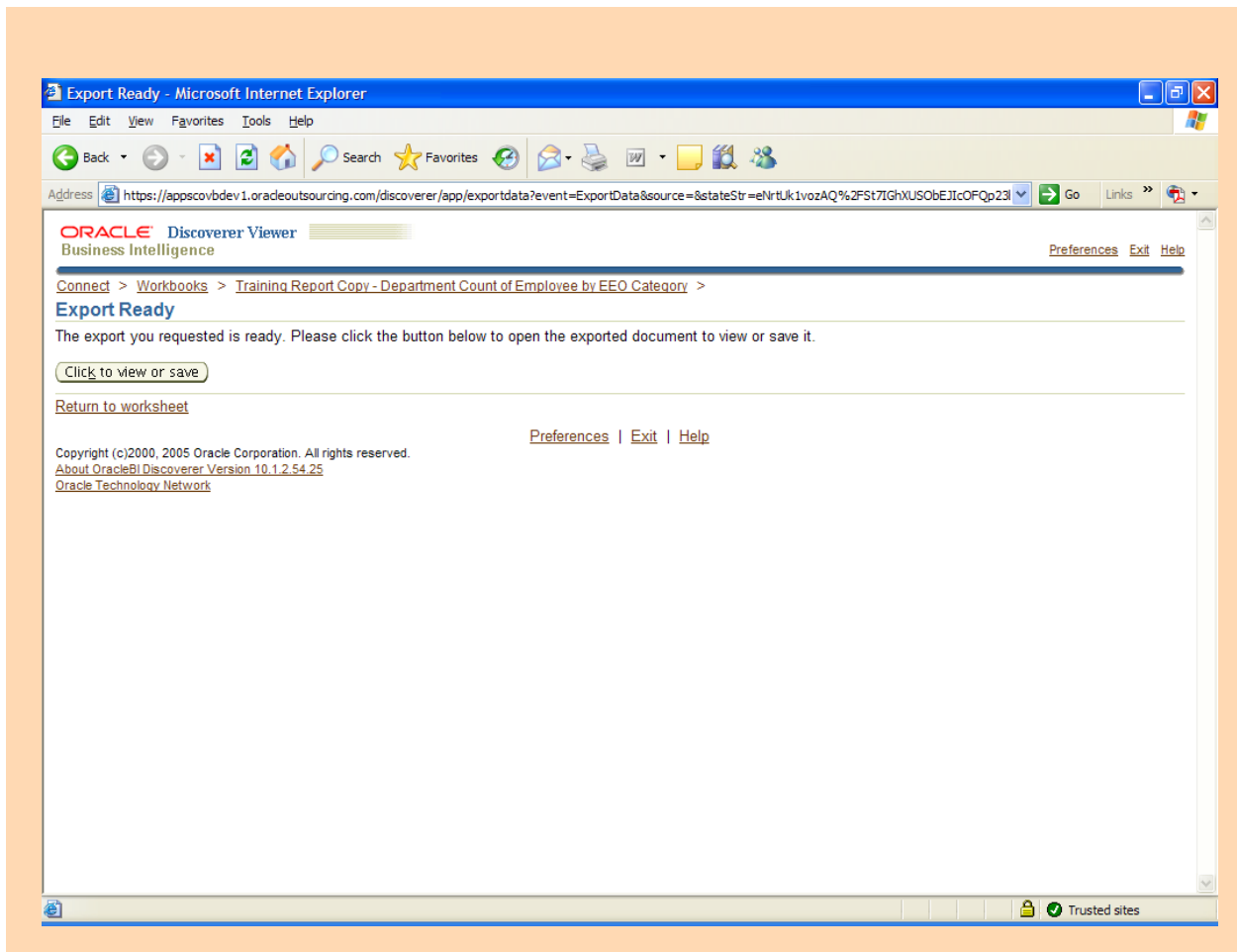
Completing the Export

- Click on the "Click to view or save' button. You will be given the option of opening or saving the Excel file.

| A1 | ▼ | f_x | City of Virginia Beach Comptroller's Division Invoice Dollar and Count for Budget Unit : '21123' Begin Date : '01-FEE |

	A	B	C	D	E	F	G	H	I
1	City of Virginia Beach Comptroller's Division Invoice Dollar and Count for Budget Unit : '21123' Begin Date : '01-FEB-2010' through End Date : '10-MAR-2010'								
2									
3	Je Period Name:FEB-10/FY10								
4									
5	Vendor Name	Minority Group	Women Owned	Small Business	Invoice Count	Invoice Debits	Invoice Credits		
6	AMERICAN REGISTRY FOR INTERNET NUMBERS LTD	-	N	N	1	100.00			
7	BANK OF AMERICA NA	-	N	N	1	825.34			
8	BAZON-COX & ASSOCIATES INC	DISABLED VET	N	Y	6	2,423.83			
9	ELECTRONIC SYSTEMS INC	-	N	Y	13	241,424.00			
10	IBM/INTERNATIONAL BUSINESS MACHINES	-	N	N	1	672.00			
11	JANTECH SERVICES INC	-	N	Y	1	13,210.00			
12	MAGNETIC PRODUCTS & SERVICES INC	-	Y	Y	1	5,160.00			
13	MICROSOFT CORP	-	N	N	2	157,520.00			
14	NORFOLK WIRE & ELECTRONICS INC	-	N	Y	2	187.75			
15	SOFTWARE HOUSE INTERNATIONAL(SHI)	Asian American	N	N	1	19,043.45			
16	SPECTRA LOGIC	-	N	Y	1	20,343.00			
17	STEALTH SHREDDING INC	-	N	Y	1	14.00			
18	TREASURER OF VIRGINIA	-	N	N	1	12.58			
19	VERIZON	-	N	N	3	8,538.95			
20	VERIZON WIRELESS	-	N	N	1	1,314.16			
21					Count: 36	Total Debit Expense: 470,789.06	Total Credits: 0.00		
22									
23									
24									
25									
26									
27									
28									
29									
30									
31									

Excel File Example

The report has been successfully exported to Excel.

Additional Features

Formatting the Report

Discoverer Viewer provides various types of tools for formatting the report. Clicking on the type will open up the related toolset.

<u>Layout</u> tools allow you to rearrange columns on the report.

<u>Format</u> tools allow you to use bold, italicize and underline features and apply colors to fonts and backgrounds.

<u>Stoplight</u> tools allow you to denote acceptable and unacceptable values.

<u>Sort</u> tools allow you to resort by various columns.

<u>Row and column</u> tools allow you to limit or increase rows and columns appearing on the report.

- For example, click on 'Rows and Columns' to open up the Rows and Columns tool set.

City of Virginia Beach Comptroller's Division
Invoice Dollar and Count
for Budget Unit : '21123'
Begin Date : '01-FEB-2010' through End Date : '10-MAR-2010'

Formatting the Report, continued

The <u>Row and Columns</u> tools are displayed, allowing you to arrange rows and/or columns on the report.

Similarly, by clicking on '<u>Format</u>', '<u>Stoplight</u>', '<u>Sort</u>', or '<u>Rows and Columns</u>', the related tools will be displayed.

Because the formatting that is done with these tools is NOT SAVED within the worksheet, any formatting that is done will need to be repeated <u>each</u> time the worksheet is re-opened.

You may want to consider exporting and formatting the report with Excel.

If you do format your report, you may cancel the effects of your formatting and revert to the original version by clicking on 'Revert to saved'.

Rerunning the Query

You may rerun the query at any time by clicking on 'Rerun query'. This operation will pull in the most recent information in the database.

Sending as Email Attachment

Using this feature, the email that is sent will NOT appear in your Sent Items in Outlook.

If you select this feature, you will first select the attachment type (.pdf, etc) and click Next.
You will then have the opportunity to enter the following:
- The sender's full email address
- The recipient's full email address
- Full email addresses for cc's and bc's
- Subject line
- Body of the email message

You will also have the opportunity to view the report attachment. When you complete these actions and click on the 'Finish' button, the email will be sent.

Instead of using the option 'send as email', you may also export and save the report and then send it as an attachment in Outlook. Using this method, the email will appear in your Outlook sent items. This method will also provide you the opportunity to rename the attachment.
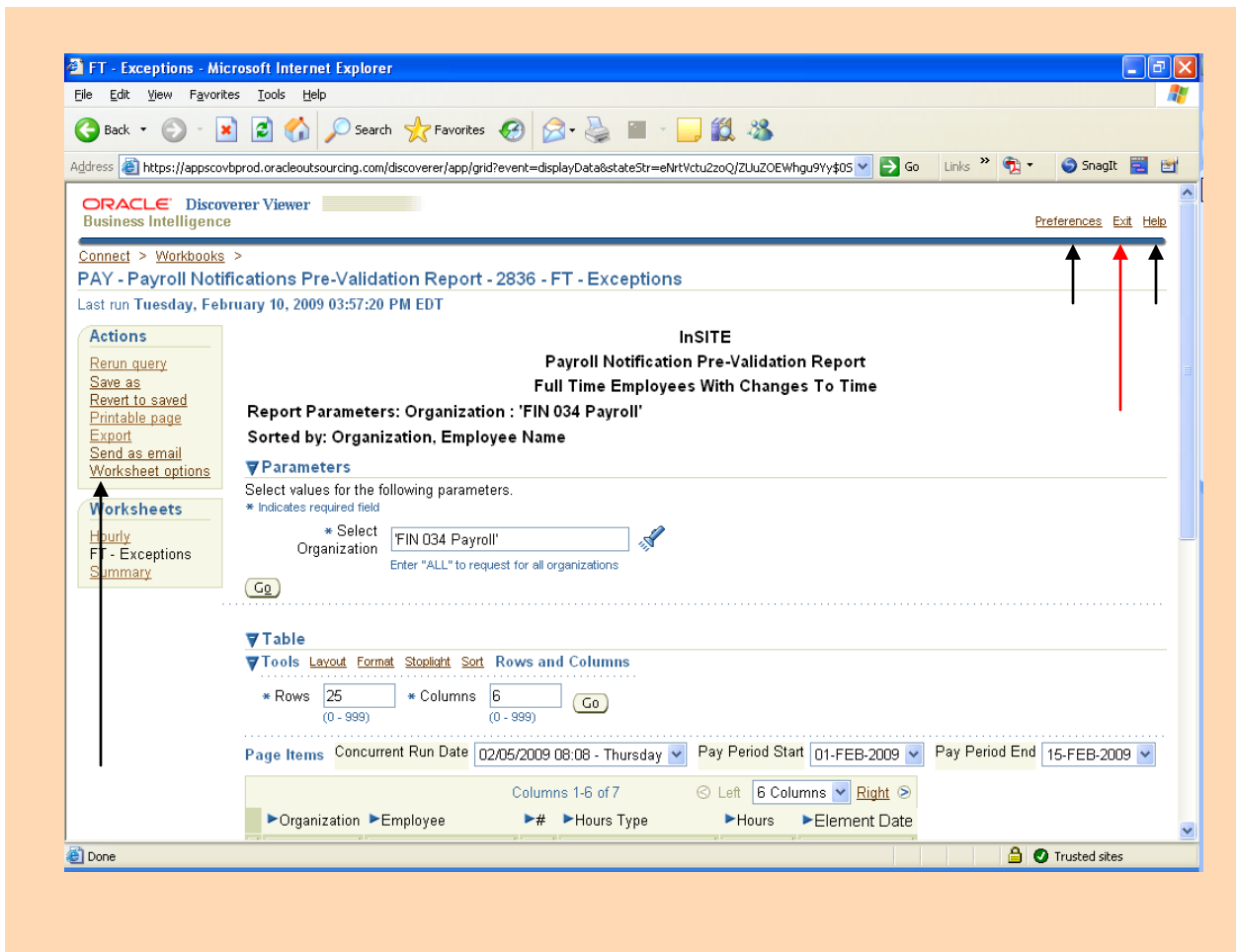
Worksheet Options, Preferences, Help and Exiting

Worksheet options and preferences are outside the scope of basic training.

Help is available by clicking the 'Help' button.

To exit the application, click on the 'Exit' button.