

# Discoverer Viewer Upgrade

Conducted March 2006  
At Kansas State University

By

Controller's Office Systems' Branch

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## 1. Overview of Training:

For the past seven months we have been using Discoverer Viewer, version 9.0.4.45.02. Oracle has recently released, and we have been testing, version 10.1.2.48.18. Long numbers but the gist is that this is a major version upgrade to the software that we use to present 'On-Line' and 'Month-End' reports to you.

Several significant changes will be presented during this training session. Several of these are

a. The workbook listing has been modified. There are now icons for 'Focus' and a drill-down '+' or '-' sign which allow you to open a specific workbook to select a specific worksheet from within that workbook. Previously you did not see these worksheet options until you had first selected the workbook and then gone to the initial parameters page.

b. Speaking of parameters, you no longer have to go back a screen to change parameters – you can now change your parameters right on your report page, click the 'go' button and get your new report. This results in significant savings in time in select cases.

c. You no longer move 'Page up' or 'Page down' but move by number of lines within the report. The number of lines you move is selected by using a drop down box within the report.

d. Depending on the number of selections possible, drop down dialog boxes now have a 'More' option which takes you to another dialog box (the next 25 to 30 options). You can select the last item in a list to go to the last page which is where you now find the 'All' option.

e. The parameter page(s) have been modified somewhat. You no longer have the option of 'Starts with' or 'Contains' but must use the '%' (percent sign) wildcard.

f. The various options presented as buttons at the top and bottom of your report (Export, Printable Page, etc), are now presented in a single 'Actions' box located at the top left of your report screen.

g. The selection of 'Printable page' now takes you to a two (2) tab location where you set up your paper size, orientation, can adjust your margins and column widths, and then select the appropriate continuation button(s). Your output is now presented in PDF format with column headings on each page.

h. The 'Export' option is much as before however the default is currently set for 'CSV' (Comma spaced delimited) instead of the Excel Workbook (xls).

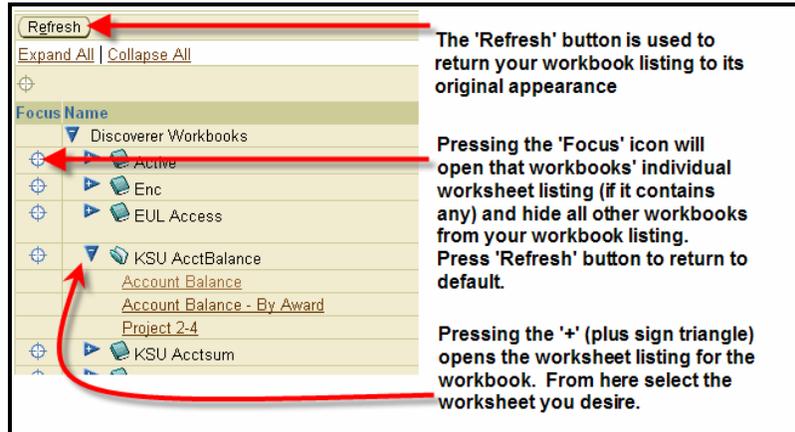
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2. Formal Materials:

a. Workbook listing: Select the '+' sign in the blue triangle just to the left of the workbook you wish to use. This will open up the listing showing individual workbooks that are available to you.

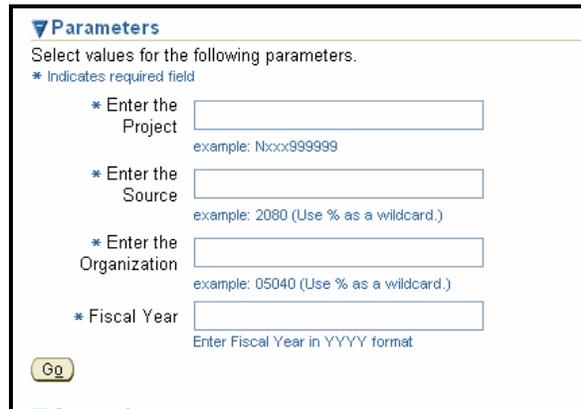
Caution: You can also click on the 'Focus' target sight – clicking on this will open up the workbook you've selected

and, at the same time, remove any other workbooks from your view. Should you do this, you must select the 'Refresh' button located at the top to bring all of the workbooks back into view. Pressing this will also close all 'worksheet' listings you may have opened.



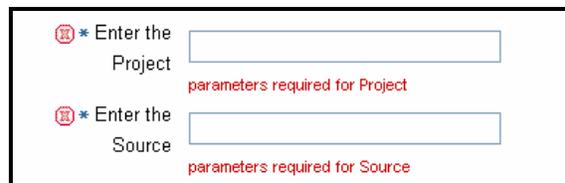
b. Click on the worksheet you desire (in this case I'm highlighting and clicking on 'Account balance'.

c. You will now be taken to the Parameters input screen. You may enter the information requested for each parameter or you may use the FIS (Oracle) wildcard character (the percent '%' sign) and then click the 'Go' button.



NOTE: This software 'remembers' parameters entered in each worksheet for the session you have active – that is, if you view a report and then go to another, you will have to type in the individual parameter values for the new worksheet. However, if you go back to the earlier worksheet (without exiting from the program), it will remember the last parameters used and will pull that report back up. Again, this feature only applied to the current session – when you exit out from the program, the parameters will be reset to empty.

d. Should you mistype an entry, or leave a block empty as I did, you will receive an error message immediately below the parameter in question. Input the necessary information or wildcard and press 'Go' once again.



NOTE: Enter will not work – if you should press the 'Enter' key, it has been our experience that the report re-runs using the parameters as they existed previously.

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e. Having clicked 'Go' we now have the report rendered and a new screen presented.

The following 'entire' page will be discussed in detail below. However, to provide everyone an initial single point of reference:

**KSU AcctBalance - Account Balance**  
Last run February 28, 2006 10:41:17 AM CST

**Actions**  
[Rerun query](#)  
[Revert to saved](#)  
[Printable page](#)  
[Export](#)  
[Send as email](#)  
[Worksheet options](#)

**Worksheets**  
[Account Balance](#)  
[Account Balance - By Awar...](#)  
[Project 2-4](#)

**Parameters**  
 Select values for the following parameters.  
 \* Indicates required field
 

- \* Enter the Project:  (example: N000399999)
- \* Enter the Source:  (example: 2080 (Use % as a wildcard))
- \* Enter the Organization:  (example: 05040 (Use % as a wildcard))
- \* Fiscal Year:  (example: 2006 (Use % as a wildcard))

**Crosstab**  
 Tools: [Layout](#) [Format](#) [Stoplight](#) [Rows and Columns](#)

**Page Items**  
 Project:  Award:  Fund Source:   
 Organization:  Period (Do not use <All>):

	Begin Balance	Prior Periods	Current Period	YTD Actual	Balance
▶ Object					
▶ A1101 CASH - STATE OF KANSAS BANK	0.00	0.00	-1,584.70	-1,584.70	
<b>Account Balance</b>					<b>-1,584.70</b>

**Annotations:**  
 - The 'Actions' box replaces the individual buttons found at the top and bottom of the prior Discoverer version.  
 - The Parameter area now allows you to change parameters without having to go back to an earlier screen.  
 - For the more adventurous - this takes you where 'crosstab' or 'layout' did before.  
 - Do NOT close (click) this -- it removes your worksheet. If you should do so, simply click on the '+' sign and your data table will be brought back.  
 - This line replaces the 'Export' button.  
 - This line replaces the 'Printable page' button.

f. Actions: This block contains the Printable page and Export features. Other features are either not currently available ('Send as email') or are for those more advanced (er – adventurous) ('Revert to saved', 'Worksheet options') and we'll cover them in a separate session.

For now, lets go into 'Printable Page'.

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g. The default for each report will be set up so that the normal report will be rendered and can be printed. However, because of the size of some of these reports, these may be on legal size paper and in landscape mode.

(1) The first tab 'Content' contains general information. Click on the 'Page Setup' tab which will result in the items shown on the next page.

**Printable Page Options**  
Set the options to generate a printable Portable Document Format (PDF) document of your worksheet.

**Content** | **Page Setup**

**General Options**

- Page items  Print current selection of page items  
 Print all combinations of page items
- Show page items  On the first page  
 Never
- Show title  On the first page  
 Never
- Data  Print all rows and columns  
 Print only the rows and columns that are displayed in the crosstab or table.

Print Header  
 Print Footer

**Crosstab Options**

- Print crosstab
  - Repeat header cells on every page

**Graph Options**

- Print graph
  - Print gradients
- Graph size  Actual size  
 Specified size
  - Width   
Maximum width: 7 (Inches)
  - Height   
Maximum height: 8.98 (Inches)

**Content** | **Page Setup**

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(2) The second tab 'Page Setup' contains the information concerning page layout, paper size (legal, letter, A4, etc), margins and column widths. All of these items are changeable by you if you so desire.

**Printable Page Options**  
Set the options to generate a printable Portable Document Format (PDF) document of your worksheet.

**Content** **Page Setup**

**Paper Setup**  
Size: Letter (8.5 x 11) **Set your paper size here**  
Orientation:  Portrait  Landscape **Change from tall to wide print here**

**Margins**  
Top: 1 Inches Bottom: 1 Inches  
Left: 0.75 Inches Right: 0.75 Inches **Adjust your margins here - NOTE: Some printers will not accept margins less than 1/2 inch**

**Scaling**  
Set the scale of the printed worksheet.  
Scale: 100% **Setting scale to a lessor number will reduce the size of the of all components (fonts, columns, etc.) as the system tries to fit the total width on one page.**

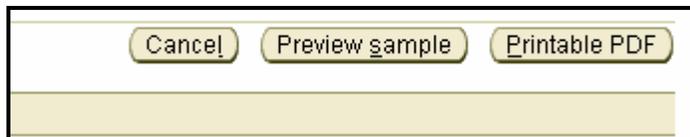
**Column Sizes**  
Set the width of the printed columns.

	Begin Balance	Prior Periods	Current Period	YTD Actual	Balance	
Object						
Column size (Inches)	2.89	1.01	0.92	1.02	0.82	0.71

**TIP** Maximum width of a single column: 7 (Inches) **You can manually set maximum column widths here. If left checked, text will wrap.**  
 Always wrap text when size exceeds column width  
If this box is not checked, text that is too large to fit will be clipped if word wrap is not enabled through Plus.

(3) Once you are satisfied with the page setup items, or if you wish to take the default settings, you then must select from one of three options presented at the top right of the page –

(a) 'Cancel' will cancel everything to this point and return you to the original report screen.

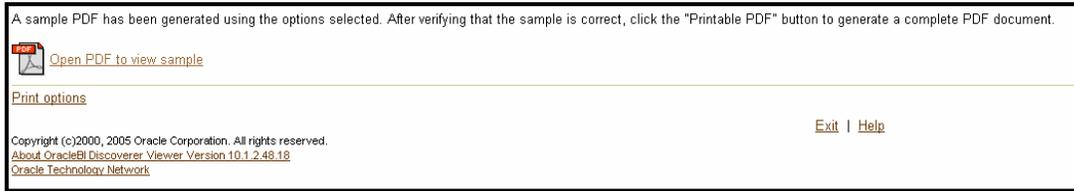


(b) 'Preview sample' will generate a sample PDF of what your output will look like. This allows you to determine if your page orientation, margins, column widths, etc., are appropriate and sufficient. This option differs from 'Printable PDF' in that it *only renders the first 50 rows of a report* that contains more than that.

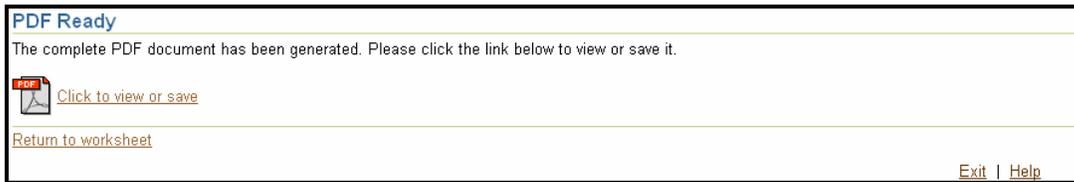
(c) 'Printable PDF' will generate the entire output in PDF format regardless of the number of lines.

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h. Depending on which of the pdf options you select, you will be presented with another screen where you will have to click on the option to view your sample or 'view or save' your report as shown here.

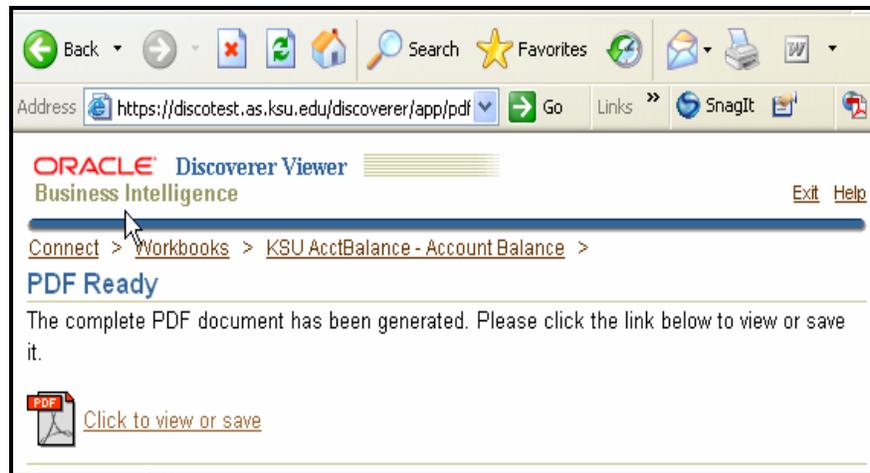


PDF screen after selecting 'Preview sample' option

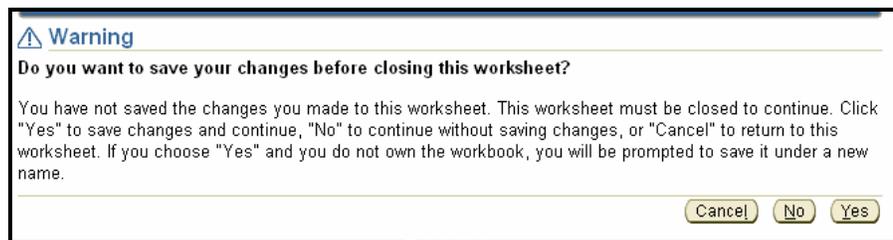


PDF screen after selecting 'Printable PDF' option

i. Once you have viewed and / or printed your report, you can save the report using Adobe Acrobat, or simply close the window. This will return you to the above screen (redrawn at right to show more of the screen). Now you can either click on the 'back' button of your browser to return to the worksheet, click on the 'Workbooks' selection from the menu line, or exit from the program.



j. If you made any changes to the report format (layout), or print parameters, you may be asked if you wish to save your changes. You may save your changes using a unique Report name. I suggest you use your initials as the first letters of the report name (example: RNS KSU Acct Balance). Discoverer will then sort your reports into their own area where they will be more easily found. If you need to delete a previously saved layout, you must use the form deletion request found on our web site.

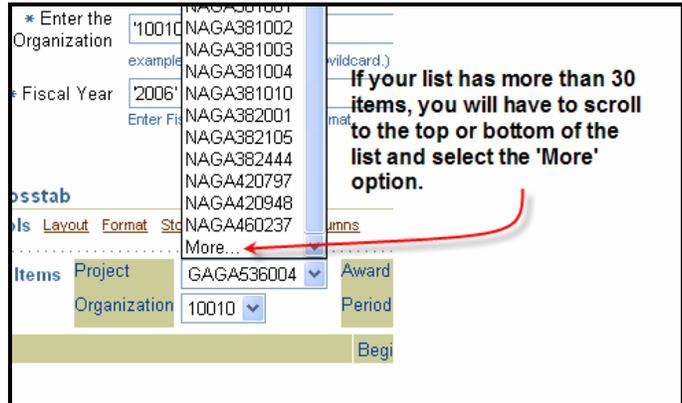


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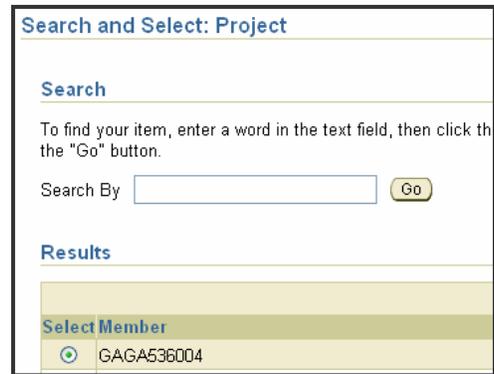
3. Miscellaneous items:

a. Parameter drop down boxes:

(1) If you have a list of more than 30 options (projects, for example), you can no longer simply click on the 'Projects' item and then scroll down to '<All>'. You must now scroll down, select the 'More' item which will then open up another dialog box.

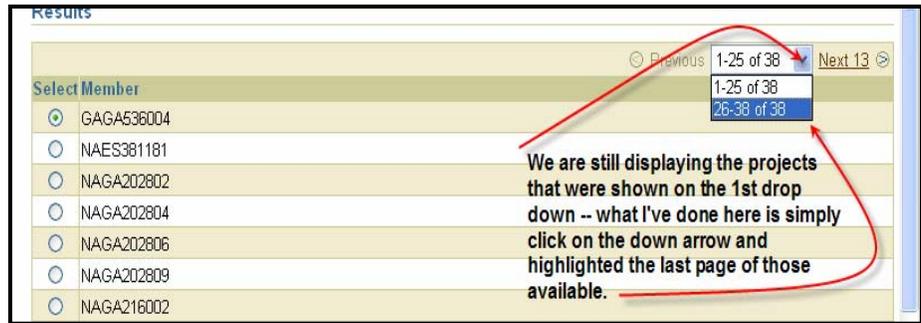


(2) Initially, this box displays the same group of items that your drop down list did. However, there is also a 'Search By' field located at the top – as shown in the screen shot at right. If you desire to select all of items for that particular parameter (Project in our example), you can simply type in 'All' and click on the 'Go' button. At this point you will advance to the screen shown for paragraph 4 below.

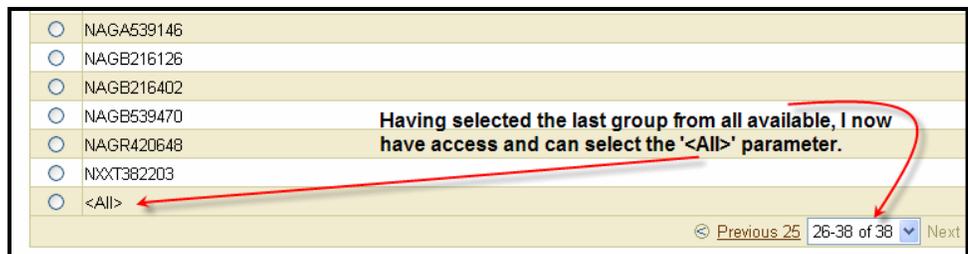


(3) If you do not use the search by option you now have to go to the list boxes located at the top and bottom

right of the screen. Click on the down arrow and then highlight (select) the page that you wish to view. To go to '<All>', we simply have to pick the last page of all shown, however, if you are looking for an item that is somewhere else, you will need to estimate (guestimate) which page to go to. When you click on that page, the dialog box will update showing the parameters within that grouping.



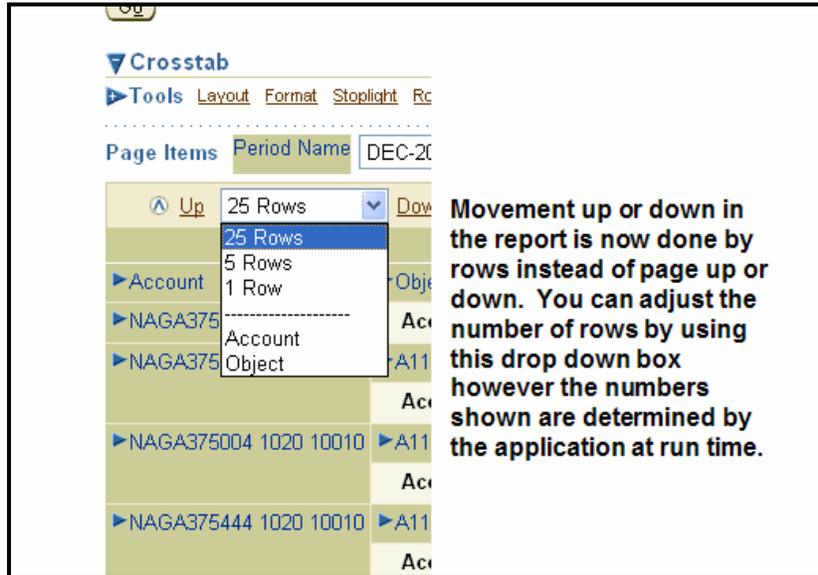
(3) Once we have found the parameter we seek, we click on the radio button to its immediate left. Once we have done that,



we must then click on the 'Select' button located on the bottom right of the screen.

b. Report Page (Screen) Movement:

If you have more rows you may have a '100 Rows' listing available as well.



The screenshot shows a Discoverer Viewer interface for a report titled 'Crosstab'. At the top, there are menu options: 'Tools', 'Layout', 'Format', 'Stoplight', and 'Rc'. Below this is a 'Page Items' section with a 'Period Name' field set to 'DEC-20'. A '25 Rows' dropdown menu is open, showing options for '25 Rows', '5 Rows', and '1 Row'. Below the dropdown, there are several rows of data, each with a '▶' icon and an 'A11' label. The data rows include account numbers like 'NAGA375004 1020 10010' and 'NAGA375444 1020 10010'. To the right of the screenshot, there is a text box explaining the new movement mechanism.

**Movement up or down in the report is now done by rows instead of page up or down. You can adjust the number of rows by using this drop down box however the numbers shown are determined by the application at run time.**