

Discoverer 10g Viewer – Changes and New Functionality

Logging into Discoverer Viewer

Each time you log into Discoverer Viewer, you will need to enter your username and password. The Database field should default to the correct value of C1PROD. If it does not, simply enter C1PROD into the field.

The user no longer has to create connections in order to access the application.



Users must select the correct Discoverer responsibility in order to be able to view reports. If you leave the default responsibility as the value and choose to continue, you will be unable to view reports.



Selecting/Opening a Discoverer Workbook

The user will see the following changes to the list of available workbooks:

1. Focus – allows the user to hide all workbooks except for the one selected.
2. Expand/Collapse Options – allows the user to drill into a specific worksheet instead of defaulting to the first worksheet. User must click on the worksheet link in order to open a report.
3. Owner – the owner, or report creator, is no longer attached to the Workbook name. There is now a separate column to identify the username who saved and shared the report with the Discoverer Viewer.
4. Last Modified – displays the day and time the report was last saved.

Result List

Refresh

Expand All | Collapse All

2.

1. Focus Name	Description	3. Owner	4. Last Modified
Discoverer Workbooks			
ARC 1099 Preparation Report	This workbook identifies vendors paid during the period selected that meet the requirements for an IRS Form 1099.	ARC	Tuesday, January 8, 2008 10:31:07 AM EDT
ARC 1099 REPORTING ALL PAYMENTS FOR IRS AUDIT.DIS	The TB worksheet is a high-level summary trial balance. The TB Detail worksheet provides document-level detail for specific SGL accounts. The Financial TB is a YTD trial balance.	SUPPLIERARC	Thursday, March 19, 2009 08:10:06 AM EDT
ARC 1099 Reports	This workbook identifies vendors paid during the period selected that meet the requirements for an IRS Form 1099.	ARC	Tuesday, March 4, 2008 06:16:52 AM EDT
Summary			
Summary with TIN Subtotal			
Detail			

Edit Parameters

For parameters that are set up with a 'LIKE' operator, users will no longer be prompted with the options of 'Exact', 'Starts with' or 'Contains'. Users will now need to use the '%' as a wildcard. In the example below, the user would need to enter 'BPD%' in order to return all BPD funds. In Discoverer 9i Viewer, the user would enter 'BPD' in either the 'Starts with' or 'Contains' field. In Discoverer 10g, the value 'BPD' will not return data until the % is added to the end of BPD.

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Enter Period
Example NOV/02-03

* Fund Like
Example 'BPD%' (Use % as a wildcard.)

Go

Additionally, users no longer have to click the Edit Parameters button in order to modify the parameter values once a report has been run. The values can be modified and the report will run after selecting the 'Go' button.

For Official Business Use Only

Parameters

Select values for the following parameters.

* Indicates required field

* Enter Period
Example NOV/02-03

* Fund Like
Example 'BPD%' (Use % as a wildcard.)

Go

Table

Tools Layout Format Spotlight Sort Rows and Columns

Page Items Period

	Fund	Budget Authority	Commitments	Obligations	Expenditures	Total Actuals	%
1	BPD0560SE09XX	187,352,000.00	501,617.69	38,188,082.98	86,842,781.73	125,532,482.40	6

Actions

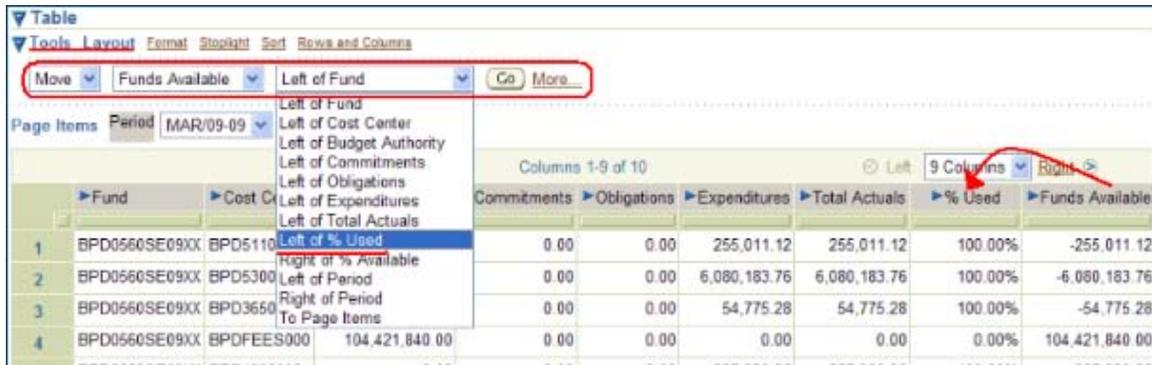
The *Rerun Query*, *Export* and *Printable Page* buttons can now be found under the Actions section on the left above the Worksheet links. Some of the options that were under the old *Presentation Options* are now located under the *Worksheet Options* found under Actions. Users no longer have the ability to hide individual buttons like they could via the *Presentation Options*.



Modify worksheet

Table>Layout

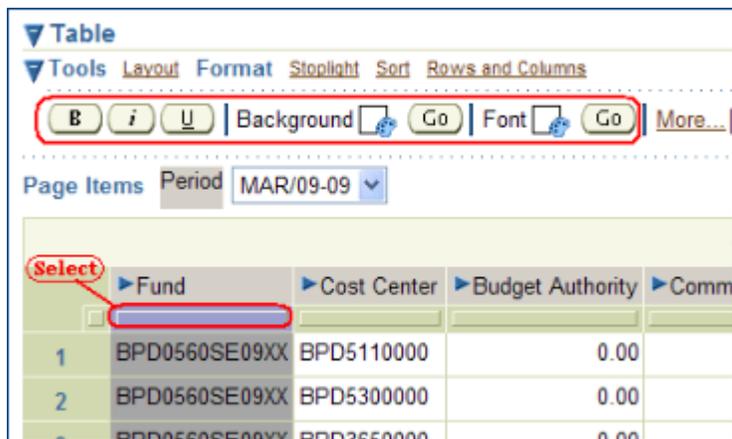
Discoverer 9i Viewer allowed the table layout, arrangement of columns and headers, to be modified by clicking on the column that you wanted to move and dragging it to the desired location. Discoverer 10g Viewer does not offer drag-and-drop functionality, but offers the same functionality through the Tools menu. By clicking on Layout from the Tools menu, the user is provided a series of drop-down lists in order to define which field to move where.



Formatting

Table>Format

Use the formatting options to alter the font/background colors, bold, underline, etc. Simply select the column you want to format and then change the format via the formatting toolbar.



Conditional Formatting

Table>Tools>Format>Create Conditional Format

Conditional formatting enables the user to highlight values within a column that meet a specific condition. This formatting tool makes analyzing data at a quick glance possible. For example, you may want to highlight all cells where the expenditure total by cost center is greater than \$300,000. In the example below, all rows have been retrieved with special emphasis on the cost centers that have expenditures greater than \$300,000.

Create Conditional Cell Format

Create a new conditional format by specifying which column to format and formatting options.
 * Indicates required field.

Name

* Name

Selections

Select a column to format, or a data point condition to identify particular values.

Item	Operator	Value
Expenditures	Greater Than (>)	300000

Format

Select formatting options to apply to the specified cells.

Font

Specify font attributes.

Style Bold Apply

 Italic

 Underline

TIP Click in the palette to select a color or enter color information as [#FFFFFF]

Background

Font

Table

Tools Layout Format Stoplight Sort Rows and Columns

Background Go Font Go More... Create Conditional Format Conditional Formats

Page Items Period MAR/09-09

Columns 1-9 of 10

	Fund	Cost Center	Budget Authority	Commitments	Obligations	Expenditures	Total Actuals
1	BPD0560SE09XX	BPD5110000	0.00	0.00	0.00	255,011.12	255,011.12
2	BPD0560SE09XX	BPD5300000	0.00	0.00	0.00	6,080,183.76	6,080,183.76
3	BPD0560SE09XX	BPD3650000	0.00	0.00	0.00	54,775.28	54,775.28
4	BPD0560SE09XX	BPDFEES000	104,421,840.00	0.00	0.00	0.00	0.00
5	BPD0560SE09XX	BPD1300000	0.00	0.00	0.00	387,939.36	387,939.36
6	BPD0560SE09XX	BPD3230000	0.00	0.00	0.00	83,416.48	83,416.48

Stoplight Formatting

Table>Tools>Stoplight

Stoplight formatting is very similar to conditional formatting with the difference being that there is the added ability to format data in a column using three ranges: Unacceptable, Acceptable and Desirable. In the example below, a desirable Expenditure Amount is less than \$100K, an unacceptable Expenditure is anything greater than \$1M and any amount in between these values is defined as acceptable.

Table

Tools Layout Format Stoplight Sort Rows and Columns

Format Expenditures Unacceptable 1000000 - Acceptable - Desirable 100000 Go

TIP Acceptable range falls between unacceptable and desirable values.

Page Items Period MAR/09-09

Columns 1-9 of 10

	Fund	Cost Center	Budget Authority	Commitments	Obligations	Expenditures	Total Actuals
1	BPD0560SE09XX	BPD5110000	0.00	0.00	0.00	255,011.12	255,011.12
2	BPD0560SE09XX	BPD5300000	0.00	0.00	0.00	6,080,183.76	6,080,183.76
3	BPD0560SE09XX	BPD3650000	0.00	0.00	0.00	54,775.28	54,775.28
4	BPD0560SE09XX	BPDFEES000	104,421,840.00	0.00	0.00	0.00	0.00
5	BPD0560SE09XX	BPD1300000	0.00	0.00	0.00	387,939.36	387,939.36
6	BPD0560SE09XX	BPD3230000	0.00	0.00	0.00	83,416.48	83,416.48

Rows and Columns

Table>Tools>Rows and Columns

The Rows and Columns option allows the user to define the number of rows and columns to display while viewing the results of a report in Discoverer. This will not affect how the data is exported or printed as either action will cause all rows to be displayed.

Table

Tools [Layout](#) [Format](#) [Stoplight](#) [Sort](#) [Rows and Columns](#)

* Rows * Columns

(0 - 999) (0 - 999)

Page Items **Period**

Text Area

This area can be used to display additional information, hints and suggestions related to the current worksheet. Only the report creators have the ability to add/modify text in this area, but the information is visible to Discoverer 10g Viewers.

Page Items **Period**

Up Down Rows 1-5 of 52, Columns 1-9 of 10

	Fund	Cost Center	Budget Authority	Commitments	Obligations	Exp
1	BPD0560SE09XX	BPD5110000	0.00	0.00	0.00	2
2	BPD0560SE09XX	BPD5300000	0.00	0.00	0.00	6.0
3	BPD0560SE09XX	BPD3650000	0.00	0.00	0.00	
4	BPD0560SE09XX	BPDFEES000	104,421,840.00	0.00	0.00	
5	BPD0560SE09XX	BPD1300000	0.00	0.00	0.00	3

Up Down Rows 1-5 of 52, Columns 1-9 of 10

Use this report to view the status of your funds by cost center.
Last updated by JCEDDY on 3/1/2009

Email

Discoverer 10g Viewer offers a quick link to attach the current worksheet, in a specified format, to an email. The user has the ability to enter multiple recipients, subject line and additional text.

Send Email

The worksheet was exported successfully. The email will contain the document as an attachment.

* Indicates required field.

* Sender
john.doe@company.com

* Recipient
john.doe@company.com, jane.doe@company.com

CC
john.doe@company.com, jane.doe@company.com

Bcc
john.doe@company.com, jane.doe@company.com

Subject
Enter any text

Body
Enter any text

Export Crosstab to Microsoft Excel Pivot Table

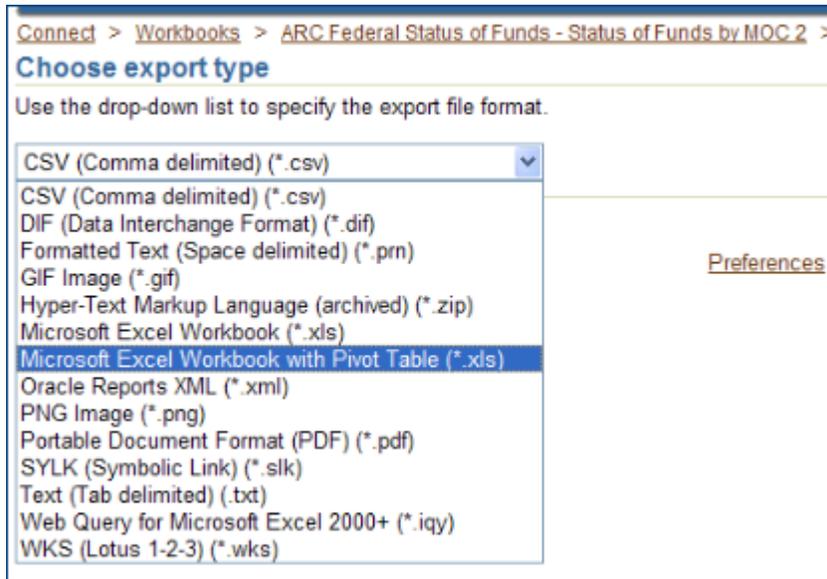
Workbooks that are created as a *Crosstab*, instead of the more common *Table*, have the ability to export into a pivot table in Microsoft Excel. Only workbooks that are set up as crosstabs have this option; most workbooks are not set up as crosstabs.

Crosstab

Tools Layout Format Spotlight Rows and Columns

Page Items Period Fund

Bfy	2002	2003	2004	2006	2007	2008	2009	Sum
	Funds Available							
MOC								
00	NULL	NULL	NULL	NULL	5,337.25	80,486.63	NULL	85,823.88
11	NULL	NULL	NULL	NULL	116,950.37	934,009.39	16,186,427.64	17,237,387.40
12	NULL	90,807.03	167,601.00	NULL	-84,910.74	225,345.61	5,193,889.33	5,592,732.23
13	NULL	NULL	NULL	NULL	-1,574.26	-7,303.27	NULL	-8,877.53
21	-6,836.36	-66,022.19	-94,747.14	-33.50	2,734.98	157,720.26	1,081,847.71	1,074,663.76
22	NULL	NULL	NULL	NULL	2,187.24	7,062.57	NULL	9,249.81
23	NULL	NULL	NULL	248.97	157,363.37	-193,018.60	-23,807.49	-59,213.75



Printable Page Options

The printing options have been expanded to include the ability to include/exclude both the title and text area while printing a worksheet, repeat headers on every page and the ability to modify various Page Setup items (ex. paper setup, margins, scaling, column sizes and wrap text).

Discoverer no longer auto sizes the report to fit to one page wide. Users will need to modify the margins, scaling and/or column sizes in order to print all the columns on one page if desired

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

Content **Page Setup**

Paper Setup
Size:
Orientation: Portrait Landscape

Margins
Top: Bottom:
Left: Right:
Inches

Scaling
Set the scale of the printed worksheet.
Scale:

Column Sizes
Set the width of the printed columns.

	Fund	Budget Authority	Commitments	Obligations	Expenditures	Total Actuals	% Used	Funds Available	% Available
Column size (Inches)	<input type="text" value="1.67"/>	<input type="text" value="1.57"/>	<input type="text" value="1.54"/>	<input type="text" value="1.47"/>	<input type="text" value="1.35"/>	<input type="text" value="1.28"/>	<input type="text" value="0.93"/>	<input type="text" value="1.49"/>	<input type="text" value="1.15"/>

TIP Maximum width of a single column: 10.48 (Inches)

Always wrap text when size exceeds column width

Revert to Saved

The Revert to Saved option will undo any formatting or table layout changes that were made during the current session. The values for the parameters will not change, but the report will be formatted according to how it was last saved.

Actions

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

Parameters

Select values for

* Indicates required