Discoverer Viewer
Report Basics

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# 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 not 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
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 highlighting 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 abbreviated 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.
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.
### Excel File Example

The report has been successfully exported to Excel.
Additional Features
Additional Discoverer Viewer Features

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Formatting the Report

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

**Layout** tools allow you to rearrange columns on the report.

**Format** tools allow you to use bold, italicize and underline features and apply colors to fonts and backgrounds.

**Stoplight** tools allow you to denote acceptable and unacceptable values.

**Sort** tools allow you to resort by various columns.

**Row and column** 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.
Formatting the Report, continued

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

Similarly, by clicking on ‘Format’, ‘Stoplight’, ‘Sort’, or ‘Rows and Columns’, 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 each 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.