

Discoverer Training Guide

Learning objectives

- Understand what Discoverer is
- Login and Log out procedures
- Run a report
- Select parameters for reports
- Change report formats
- Export a report and choose different file formats
- Email the report

How to Login to Discoverer

Click on the Discoverer link on the HR home page at www.hr.uwa.edu.au

Login to the screen as follows:

User name: your Alesco account (eg jdoe)

Password: your Alesco password

Database: hisprod

End User Layer: leave blank

Leave the other fields as they are with the default values.



Click on the **Go** button to connect to the Alesco database in Discoverer.

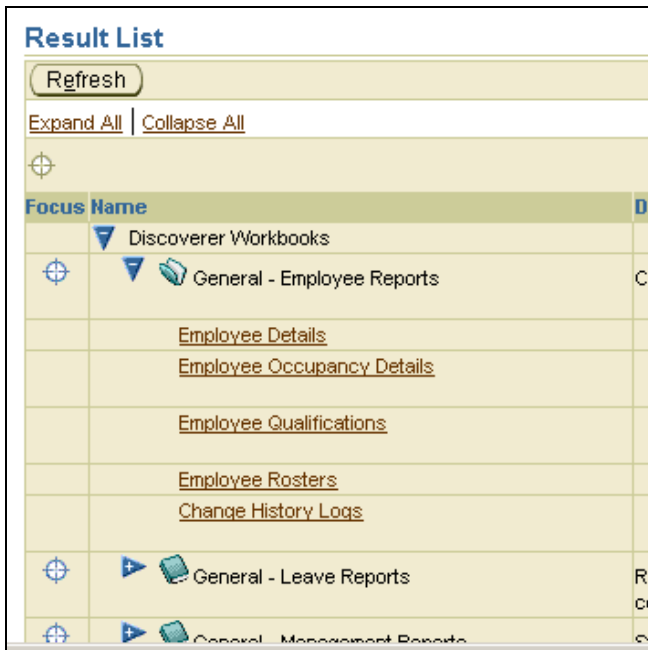


After logging in to Discoverer, a list of Workbooks is displayed. Each Workbook contains Worksheets (similar to Excel).



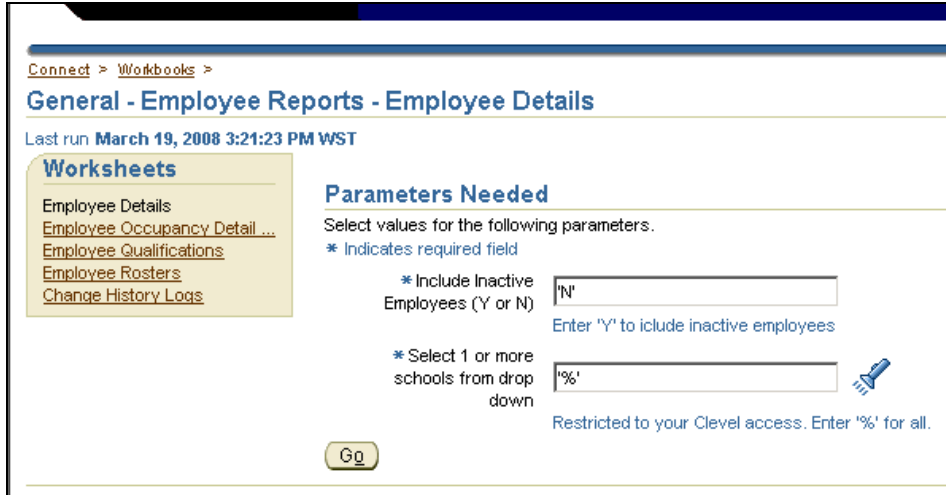
Click Expand All to see a list of all reports available.

To open a report or Workbook, click on the name of the report



Selecting Parameter Values for Reports

Each Worksheet offers the ability to filter reports by changing the parameters.



Connect > Workbooks >

General - Employee Reports - Employee Details

Last run March 19, 2008 3:21:23 PM WST

Worksheets

- Employee Details
- Employee Occupancy Detail ...
- Employee Qualifications
- Employee Rosters
- Change History Logs

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Include Inactive Employees (Y or N)

Enter 'Y' to include inactive employees

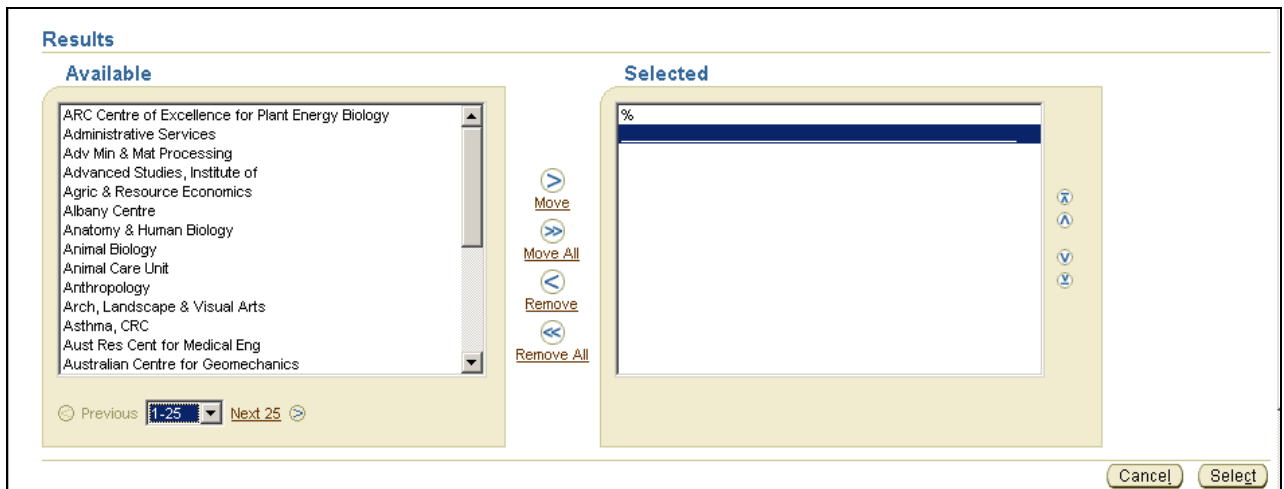
* Select 1 or more schools from drop down

Restricted to your Clevel access. Enter '%' for all.

Go

Note that the Alesco wildcard (the percentage sign) is automatically inserted into the field if more than one choice is available. If the wild card is left, all options are selected.

Click the torch icon to display a list of search criteria.



Results

Available

- ARC Centre of Excellence for Plant Energy Biology
- Administrative Services
- Adv Min & Mat Processing
- Advanced Studies, Institute of
- Agric & Resource Economics
- Albany Centre
- Anatomy & Human Biology
- Animal Biology
- Animal Care Unit
- Anthropology
- Arch, Landscape & Visual Arts
- Asthma, CRC
- Aust Res Cent for Medical Eng
- Australian Centre for Geomechanics

Previous 1-25 Next 25

Selected

%

Move
Move All
Remove
Remove All

Cancel Select

Remove the wildcard by double-clicking on the % (or clicking the Remove button)
Double-click the desired parameter (or click Move). More than one may be selected.

When all the parameters have been specified click Select.



The choice of parameters is confirmed.

Last run **March 19, 2008 3:21:23 PM WST**

Worksheets

[Employee Details](#)

[Employee Occupancy Detail ...](#)

[Employee Qualifications](#)

[Employee Rosters](#)

[Change History Logs](#)

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Include Inactive Employees (Y or N)

Enter 'Y' to include inactive employees

* Select 1 or more schools from drop down

Restricted to your Clevel access. Enter '%' for all.

Click Go to submit the report. A progress icon is displayed while the report is compiled.

Query Progress

Executing query

Estimated Time Unknown

Elapsed Time 00:00:01

Once the report data is retrieved it displays on the screen.

Table

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

Up 30 Rows Down Rows 1-30 of 39

	School	Employee#	Title	Name	Gender	Date Of Birth	Job No	Position Title	Award	FTE	Emp Status	LEVEL	C
1	Albany Centre				Female	27-FEB-1972	01	Casual Teaching	ACAD	100	CAST	CAST	3
2	Albany Centre				Female	19-JUN-1965	01	Casual Teaching	ACAD	100	CAST	CAST	2

Changing the Report Format

Discoverer allows the user to format worksheet items and cells to change their appearance, for example; font, color, and background color.

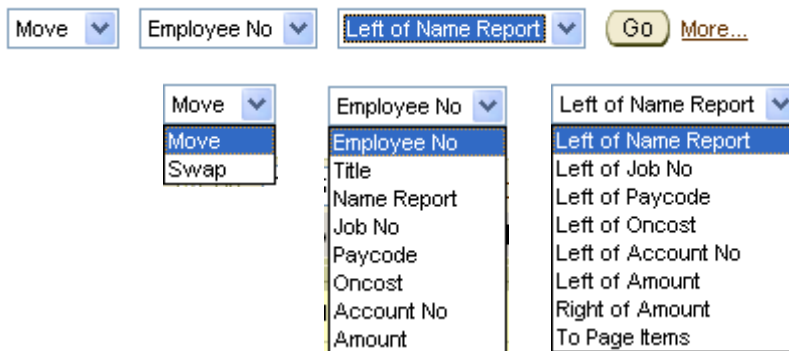
The following formatting options appear at the top of an open Worksheet.

Table

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

Layout

The Layout format option controls the order of the columns within the report. The position of the columns can be changed by clicking on the drop down button.



Page Items

Adding Page Items allows the data to be filtered. Click on the More link. This opens a page which displays the column titles only and gives buttons for each movement.

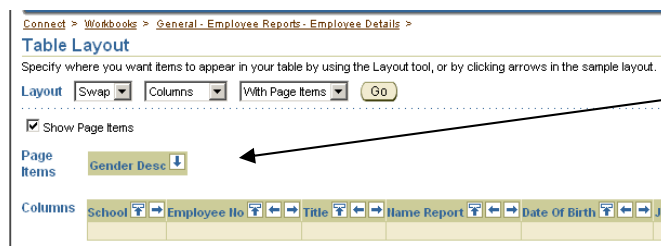
Table Layout

Specify where you want items to appear in your table by using the Layout tool, or by clicking arrows in the sample layout.

Layout [Swap](#) [Columns](#) [With Page Items](#) [Go](#)

Show Page Items

Page Items (No Items in Page.)



Selecting a field adds it to Page items.



Stoplight

Stoplight is a way of colour coding data. Values can be specified as Unacceptable, Acceptable, and Desirable.

Table

Tools Layout Format Stoplight Sort Rows and Columns

Format Amount Unacceptable [red box] - Acceptable [yellow box] - Desirable [green box] Go Conditional Formats

TIP Acceptable range falls between unacceptable and desirable values.

	Region	City	Profit SUM
1	Central	Chicago	\$7,948
2		Cincinnati	\$31,112
3		Dallas	\$8,733
4		Louisville	\$31,883
5		Minneapolis	\$8,550
6		Nashville	\$8,639
7		St. Louis	\$19,310
8	East	Washington	\$23,304
9		Pittsburgh	\$16,465

Annotations:

- Unacceptable (points to red cells: Chicago, Dallas, Minneapolis, Nashville)
- Desirable (points to green cells: Cincinnati, Louisville)
- Acceptable Level (points to yellow cell: St. Louis)

View Printable page

To preview a worksheet, select the Printable Page link.

Actions

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

Printable Page Options

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

Content Page Setup

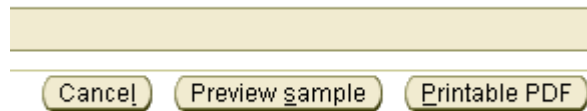
General Options

- 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

Use the options in the Content Tab to change the print settings, if required.

The Page Setup tab offers the ability to define paper orientation and setup your column widths appropriate to the report.

Click Preview Sample to generate a sample PDF version of the worksheet and display the "PDF Sample Ready page".



Click on the PDF document to view or save, or click on the Back button in your browser to adjust the settings.

PDF Ready

The complete PDF document has been generated. Please click the link below to view or save it.



[Return to worksheet](#)

Exporting Reports

Worksheet data can be exported to enable the use of the data in a different application. report.

Actions

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

Choose export type

Use the drop-down list to specify the export file form

CSV (Comma delimited) (*.csv) ▼

CSV (Comma delimited) (*.csv)

DIF (Data Interchange Format) (*.dif)

Formatted Text (Space delimited) (*.prn)

Hyper-Text Markup Language (archived) (*.zip)

Microsoft Excel Workbook (*.xls)

Oracle Reports XML (*.xml)

Portable Document Format (PDF) (*.pdf)

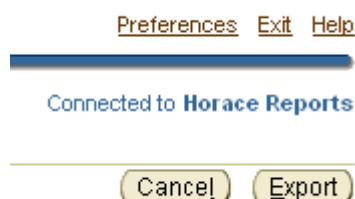
SYLK (Symbolic Link) (*.slk)

Text (Tab delimited) (.txt)

Web Query for Microsoft Excel 2000+ (*.iqy)

WKS (Lotus 1-2-3) (*.wks)

Click on the top right corner button to Export or Cancel.





Click on the link below to view the file.

Export Ready

The export you requested is ready.

[Click to view or save](#)

[Return to worksheet](#)

Exporting to Web Query

Exporting worksheets to this format allows the user to update Excel reports without logging in to Discoverer. Follow the procedure to export the report. Specify Web Query for Microsoft Excel 2000+ (*.iqy).

[Connect](#) > [Workbooks](#) > [General - Leave Reports - Leave Balances Details](#) >

Choose export type

Use the drop-down list to specify the export file format.

Web Query for Microsoft Excel 2000+ (*.iqy) ▼

Do you want to Prompt Excel users for connection information?

Yes, require Excel users to enter connection information

No, save connection information in Web Query file

Tick Yes to require log in details before updating the report.

Web Query Prompts for Leave Balances Details

Select the parameters for which users will be prompted to enter values.

TIP Each parameter selected will be prompted for separately. If you do not select a parameter, the query will always run from Excel with that parameter's current values (as shown below).

Parameters

Select Parameter	Description	Type	Current Value(s)
<input type="checkbox"/> School 1	Use drop down to select 1 or more Schools	value	% Albany Centre
<input type="checkbox"/> Leave Desc	Select the type of leaves from the drop down	value	%

[Cancel](#) [Export](#)

Specify parameters if desired, then click Export.

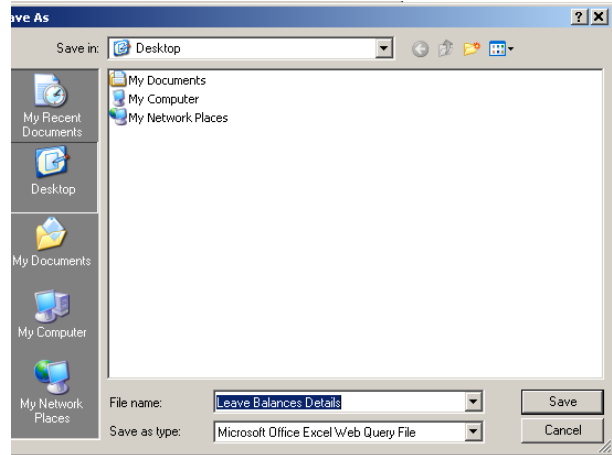
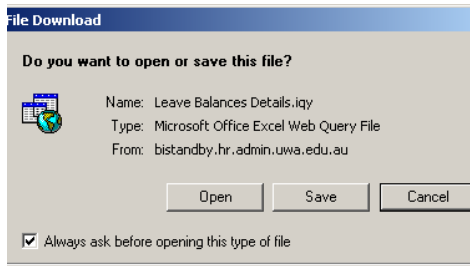
[Connect](#) > [Workbooks](#) > [General - Leave Reports - Leave Balances Details](#) >

Export Ready

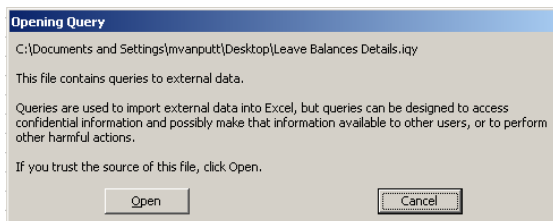
The export you requested is ready. Please click the button below to open the export

[Click to view or save](#)

Click Save, then specify a location.

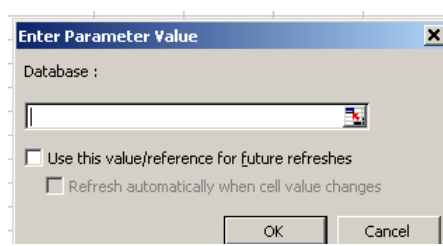
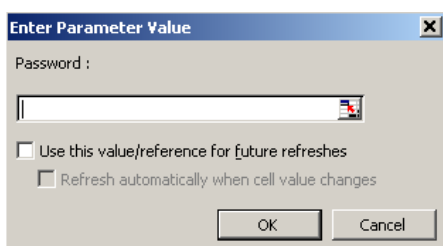
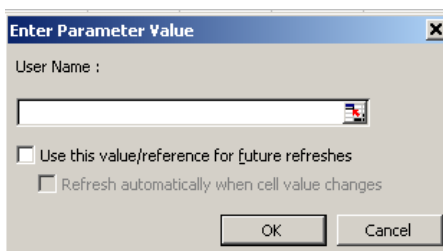


Double-click on the report icon to open Excel.

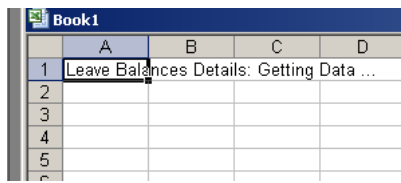


Click Open to continue.

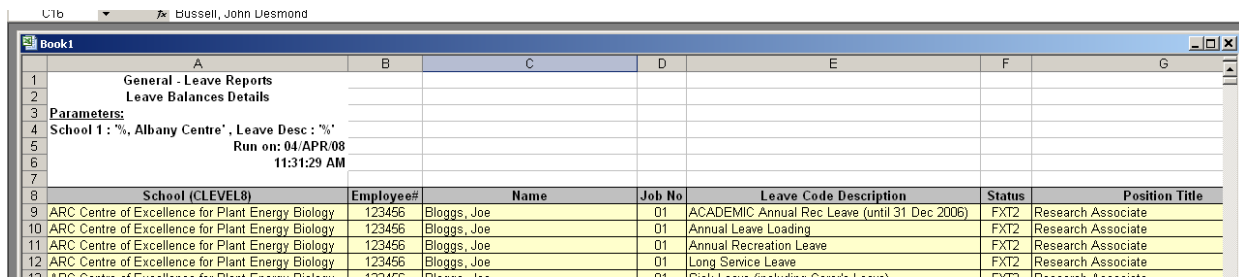
When prompted, enter the user name, password and database (HISPROD).



Data is refreshed and the updated report is displayed.



	A	B	C	D
1	Leave Balances Details: Getting Data ...			
2				
3				
4				
5				



School (CLEVEL8)	Employee#	Name	Job No	Leave Code Description	Status	Position Title
ARC Centre of Excellence for Plant Energy Biology	123456	Bloggs, Joe	01	ACADEMIC Annual Rec Leave (until 31 Dec 2006)	FXT2	Research Associate
ARC Centre of Excellence for Plant Energy Biology	123456	Bloggs, Joe	01	Annual Leave Loading	FXT2	Research Associate
ARC Centre of Excellence for Plant Energy Biology	123456	Bloggs, Joe	01	Annual Recreation Leave	FXT2	Research Associate
ARC Centre of Excellence for Plant Energy Biology	123456	Bloggs, Joe	01	Long Service Leave	FXT2	Research Associate
ARC Centre of Excellence for Plant Energy Biology	123456	Bloggs, Joe	01	Sick Leave (excluding Casual Leave)	FXT2	Research Associate

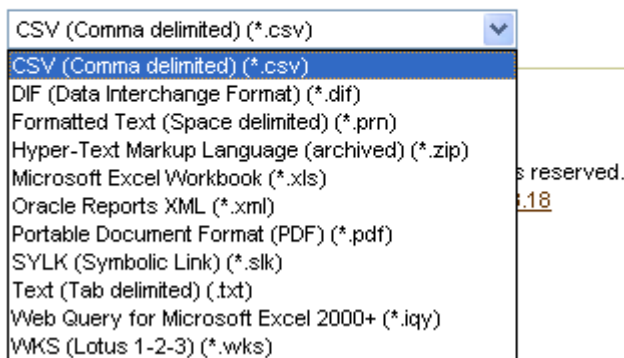
Email the Report

A copy of the worksheet can be sent to one or more email recipients in a range of formats. To send a Discoverer worksheet in an email, select the Send as email link in the Actions area to display the "Choose attachment type".

[Connect](#) > [Workbooks](#) > [Cost - Cost Centre by Account No - Cost Details](#) >

Choose attachment type

Use the drop-down list to specify the export file format.



- CSV (Comma delimited) (*.csv)
- CSV (Comma delimited) (*.csv)
- DIF (Data Interchange Format) (*.dif)
- Formatted Text (Space delimited) (*.prn)
- Hyper-Text Markup Language (archived) (*.zip)
- Microsoft Excel Workbook (*.xls)
- Oracle Reports XML (*.xml)
- Portable Document Format (PDF) (*.pdf)
- SYLK (Symbolic Link) (*.slk)
- Text (Tab delimited) (*.txt)
- Web Query for Microsoft Excel 2000+ (*.iqy)
- WKS (Lotus 1-2-3) (*.wks)

Select an export type from the drop down list and click Next to display the "Send Email page". Use the "Send Email page" to enter the email addresses of the intended email recipients, and create the email message.



Send Email

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

* Indicates required field.

* Sender

* Recipient

CC

Bcc

Subject

Body

[View Attachment](#)

If you want to display the attached worksheet file, click the View Attachment button. Click Finish to send the email.

Log Out Screen

Exit the Discoverer by clicking on the Exit Link from the bottom or top right corner of the page.