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.

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.

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.

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

Once the report data is retrieved it displays on the screen.
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  Move  Swap  Columns  With Page Items  Go

Show Page Items

Page Items  (No Items in Page)

Selecting a field adds it to Page items.
Page items allow the data to be filtered by field.

**Format**
The Format link controls cell highlights and font changes.

**More...**
This formatting link gives the option to select a column or section of the report and highlight the background or font.

**Format Cells**
Specify font, border, and number format options for selected columns in the table.

**Font**
Specify font attributes.

- **Style**
  - **Bold**
  - **Italic**
  - **Underline**

**TIP** Click in the palette to select a color or enter color information as **#FFFFFF**.
Stoplight is a way of colour coding data. Values can be specified as Unacceptable, Acceptable, and Desirable.

View Printable page

To preview a worksheet, select the Printable Page link.

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

General Options
- Show title: On the first page
- Data: Print all rows and columns
- Print Header
- Print Footer

Actions
- Rerun query
- Revert to saved
- Printable page
- Export
- Send as email
- Worksheet options

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.

Click to view or save

Return to worksheet

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**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 format:

- CSV (Comma delimited) (*.csv)
- CSV (Comma delimited) (*.csv)
- DIF (Data Interchange Format) (*.dif)
- Formatted Text (Space delimited) (*.prn)
- HYPERTEXT Markup Language (archived) (*.zip)
- Microsoft Excel Workbook (*.xls)
- Oracle Reports XML (*.xml)
- Portable Document Format (PDF) (*.pdf)
- SYLK (Symbolic Link) (*.sylk)
- 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).

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

Web Query Prompts for Leave Balances Details
Select the parameters for which users will be prompted to enter values.

Specify parameters if desired, then click Export.

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.

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".

Choose attachment type

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

- CSV (Comma delimited) (*.csv)
- DIF (Data Interchange Format) (*.dif)
- Formatted Text (Space delimited) (*.txt)
- Hyper-Text Markup Language (archived) (*.zip)
- Microsoft Excel Workbook (*.xls)
- Oracle Reports XML (*.xml)
- Portaile Document Format (PDF) (*.pdf)
- SYLK (Symbolic Link) (*.slk)
- Text (Tab delimited) (*.txt)

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:** jane.doe@curtin.edu.au
- john.doe@company.com

** Recipient:** john.doe@company.com, jane.doe@company.com
- 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:** Report

** Body:**

Please comment on the attached report.

Enter any text

[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.