

# Oracle9i Discoverer Administrator

Administration Guide

Version 9.0.2

January 2002

Part No. A90881-02

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# Contents

<b>Send us your comments</b> .....	xxv
<b>Preface</b> .....	xxvii
Intended Audience .....	xxvii
Structure.....	xxvii
Related Documents.....	xxviii
Conventions.....	xxix
Oracle Discoverer Navigation and Accessibility .....	xxix
Keyboard Navigation.....	xxix
Documentation Accessibility .....	xxix
<b>Part I Conceptual and task information</b>	
<b>1 Introducing Oracle9i Discoverer Administrator</b>	
<b>Introducing Oracle9i Discoverer Administrator</b> .....	1-1
<b>What is Oracle Discoverer?</b> .....	1-1
<b>What is Oracle9i Discoverer Administrator?</b> .....	1-2
<b>What is your role as a Discoverer manager?</b> .....	1-3
<b>Basic concepts for Discoverer managers</b> .....	1-3
What is business intelligence? .....	1-3
What are relational databases, OLTP systems, and data warehouses? .....	1-4
What are the fundamental concepts behind a Discoverer system?.....	1-4
Introducing the End User Layer.....	1-4
Introducing business areas .....	1-5

Introducing folders and items .....	1-5
Introducing workbooks and worksheets .....	1-6
Introducing hierarchies and drills.....	1-6
Introducing summary folders.....	1-7
How does Discoverer work?.....	1-7
<b>What are the steps to a successful Discoverer implementation? .....</b>	<b>1-7</b>
<b>What is involved in maintaining a Discoverer system? .....</b>	<b>1-11</b>
<b>What are the new features in Discoverer Administrator Version 9.0.2?.....</b>	<b>1-12</b>

## **2 Getting Started with Discoverer Administrator**

<b>Getting started with Discoverer Administrator .....</b>	<b>2-1</b>
<b>What are the prerequisites for using Oracle Discoverer? .....</b>	<b>2-1</b>
What are the system prerequisites? .....	2-1
What are the data access prerequisites? .....	2-2
<b>How to start Discoverer Administrator .....</b>	<b>2-3</b>
What is the Workarea?.....	2-4
About the tabs in the Workarea window .....	2-5
About the context sensitive menus in the Workarea window .....	2-8
About the Administration Tasklist.....	2-8
<b>About Discoverer Administrator documentation and online help.....</b>	<b>2-9</b>

## **3 Creating and maintaining End User Layers**

<b>Creating and maintaining End User Layers.....</b>	<b>3-1</b>
<b>What is an End User Layer? .....</b>	<b>3-2</b>
Why is the End User Layer useful?.....	3-2
<b>What are End User Layer owners? .....</b>	<b>3-3</b>
<b>What privileges do you need to create an End User Layer in an Oracle database? .....</b>	<b>3-4</b>
<b>What privileges do you need to create an End User Layer in a non-Oracle database? .....</b>	<b>3-5</b>
<b>What privileges do you need to maintain an End User Layer?.....</b>	<b>3-5</b>
<b>What is the EUL Gateway?.....</b>	<b>3-6</b>
<b>How to create an End User Layer for an existing database user.....</b>	<b>3-6</b>
<b>How to create an End User Layer in a new database user.....</b>	<b>3-8</b>
<b>How to delete an End User Layer .....</b>	<b>3-9</b>
<b>How to view or change the default End User Layer.....</b>	<b>3-10</b>
<b>About copying EULs and EUL objects by exporting and importing .....</b>	<b>3-11</b>

<b>Which export/import method do you use?.....</b>	<b>3-11</b>
About using the Discoverer Export Wizard and Import Wizard.....	3-12
About using the Discoverer command line interface to export/import EUL objects.....	3-12
About using the standard database export/import commands to export/import EUL owners .....	3-13
<b>How to export the entire EUL using the Export Wizard.....</b>	<b>3-13</b>
<b>How to export selected business areas using the Export Wizard .....</b>	<b>3-16</b>
<b>How to export selected EUL objects using the Export Wizard.....</b>	<b>3-18</b>
<b>How to export End User Layer objects (to import to another database) using the Discoverer command line interface .....</b>	<b>3-20</b>
<b>How to import End User Layer objects to a database (after export from another database) using the Discoverer command line interface .....</b>	<b>3-21</b>
<b>How to export an EUL using the standard database export utility .....</b>	<b>3-22</b>
<b>How to import an EUL using the standard database import utility .....</b>	<b>3-23</b>
<b>How to import EUL objects from a file using the Import Wizard.....</b>	<b>3-24</b>
<b>Notes about EUL creation and maintenance .....</b>	<b>3-28</b>
What are identifiers? .....	3-28
What are the space requirements and storage parameters for a typical EUL?.....	3-28
What are the EUL data migration scenarios with analytic functions? .....	3-30

## 4 Creating and maintaining business areas

<b>Creating and maintaining business areas.....</b>	<b>4-1</b>
<b>What are business areas?.....</b>	<b>4-1</b>
<b>How to prepare to build a new business area.....</b>	<b>4-3</b>
<b>What is the Load Wizard?.....</b>	<b>4-3</b>
<b>How to create a business area using the Load Wizard .....</b>	<b>4-4</b>
Loading from the online dictionary.....	4-4
Loading from a Gateway.....	4-6
Selecting tables and views.....	4-8
Specifying what Discoverer Administrator generates for the business area.....	4-9
Naming the business area, specifying object name and sorting options .....	4-10
<b>How to open an existing business area when connecting to Discoverer Administrator....</b>	<b>4-11</b>
<b>How to open an existing business area when already connected to Discoverer Administrator..</b>	<b>4-11</b>
<b>How to copy business areas between EULs.....</b>	<b>4-12</b>
<b>How to edit business area properties.....</b>	<b>4-12</b>

<b>How to delete a business area .....</b>	<b>4-13</b>
<b>How to synchronize a business area with the database .....</b>	<b>4-15</b>
<b>Notes about business area creation and maintenance .....</b>	<b>4-17</b>
Why might a business area (or folders within it) not be visible to a user? .....	4-17

## **5 Creating and maintaining folders**

<b>Creating and maintaining folders .....</b>	<b>5-1</b>
<b>What are folders? .....</b>	<b>5-2</b>
<b>What are simple folders? .....</b>	<b>5-2</b>
<b>What are complex folders? .....</b>	<b>5-3</b>
What are the benefits of using complex folders instead of database views? .....	5-4
<b>What are custom folders? .....</b>	<b>5-4</b>
What are the differences between custom folders and simple folders? .....	5-5
Examples of custom folders .....	5-5
<b>About dependencies between folders .....</b>	<b>5-7</b>
<b>About sharing folders across business areas .....</b>	<b>5-8</b>
<b>How to create simple folders from the database .....</b>	<b>5-9</b>
<b>How to create complex folders .....</b>	<b>5-9</b>
<b>How to create custom folders .....</b>	<b>5-10</b>
<b>How to edit folder properties .....</b>	<b>5-12</b>
<b>How to edit a custom folder's SQL statement .....</b>	<b>5-14</b>
<b>How to delete folders from a business area .....</b>	<b>5-14</b>
<b>How to assign folders to a business area .....</b>	<b>5-17</b>
<b>How to assign a folder to multiple business areas .....</b>	<b>5-17</b>
<b>How to sort folders in a business area .....</b>	<b>5-18</b>
<b>How to sort items in a folder .....</b>	<b>5-18</b>
<b>How to re-order folders in a business area .....</b>	<b>5-19</b>
<b>How to validate folders in a business area .....</b>	<b>5-19</b>

## **6 Managing connections to Discoverer**

<b>Managing connections to Discoverer .....</b>	<b>6-1</b>
<b>What are Discoverer connections? .....</b>	<b>6-1</b>
<b>About types of connection .....</b>	<b>6-2</b>
About user-defined connections .....	6-2
About public connections .....	6-2

About the Discoverer connections page.....	6-3
How to create public connections.....	6-4
How to enable Discoverer users to create user defined connections .....	6-9

## 7 Controlling access to information

Controlling access to information .....	7-1
About Discoverer and security.....	7-1
About Discoverer access permissions.....	7-2
About Discoverer task privileges .....	7-3
How to specify a user or role (responsibility) that can access a business area .....	7-4
How to specify the business areas a user or role (responsibility) can access .....	7-5
How to specify the tasks a user or role (responsibility) can perform.....	7-7
How to specify a user or role (responsibility) to perform a specific task.....	7-9
How to set query retrieval limits .....	7-10
How to set scheduled workbook limits.....	7-12

## 8 Scheduling workbooks

Scheduling workbooks.....	8-1
What are workbooks and scheduled workbooks? .....	8-1
Why schedule workbooks? .....	8-2
What happens when an end user schedules a workbook? .....	8-3
What Oracle database features support workbook scheduling?.....	8-4
Where to store the results of scheduled workbooks? .....	8-4
What are the prerequisites for scheduling workbooks? .....	8-5
How to confirm that the DBMS_JOB package is installed.....	8-6
How to specify the owner of the tables containing scheduled workbooks results.....	8-7
How to control the frequency that the server checks for new scheduled jobs .....	8-10
How to view and manage scheduled workbooks.....	8-11
About scheduled workbooks and compatibility between the current version of Discoverer and previous releases.....	8-14

## 9 Maintaining items and item classes

Maintaining items and item classes.....	9-1
What are items? .....	9-2

<b>What are item classes?</b> .....	9-2
<b>What are lists of values?</b> .....	9-3
<b>About setting up lists of values</b> .....	9-4
<b>What are alternative sorts?</b> .....	9-4
<b>Examples of different ways to implement alternative sorts</b> .....	9-5
Example 1: Using a custom folder to implement alternative sorts.....	9-5
Example 2: Using a database table to implement alternative sorts.....	9-6
Example 3: Using a calculated item and a DECODE statement to implement alternative sorts .....	9-7
<b>What is drill to detail?</b> .....	9-8
<b>About setting up drill to detail</b> .....	9-8
<b>What are date items?</b> .....	9-8
<b>What are date format masks?</b> .....	9-8
<b>About truncating date items and the EUL_DATE_TRUNC function</b> .....	9-9
<b>About applying conditions to truncated date items</b> .....	9-10
<b>About drilling out to other applications</b> .....	9-11
<b>How to edit item properties</b> .....	9-13
<b>How to create a LOV item class</b> .....	9-14
<b>How to create an alternative sort item class</b> .....	9-18
<b>How to create a drill to detail item class</b> .....	9-22
<b>How to create a list of values using a custom folder</b> .....	9-24
<b>How to edit an item class</b> .....	9-25
<b>How to add items to an item class</b> .....	9-29
How to add items to an item class using drag and drop.....	9-29
How to add items to an item class using the Edit Item Class dialog.....	9-29
How to add items to an item class using the Item Properties dialog.....	9-30
<b>How to remove items from an item class</b> .....	9-30
How to remove items from an item class using a popup menu.....	9-30
How to remove items from an item class using the Edit Item Class dialog .....	9-31
How to remove items from an item class using the Item Properties dialog.....	9-31
<b>How to view the items that use an item class</b> .....	9-31
<b>How to view the list of values for an item</b> .....	9-32
<b>How to view the list of values for an item class</b> .....	9-32
<b>How to delete items and item classes</b> .....	9-33
<b>Notes about maintaining items and item classes</b> .....	9-35
Notes about items based on columns with user-defined datatypes .....	9-35



## 10 Creating and maintaining joins

Creating and maintaining joins .....	10-1
What are joins? .....	10-2
What are single item joins and multi item joins? .....	10-2
About one-to-one join, one-to-many, and many-to-many joins .....	10-3
How to create single item joins .....	10-3
How to create multi-item joins .....	10-4
How to edit join properties .....	10-5
How to edit joins .....	10-6
How to delete joins .....	10-7
What is a fan trap? .....	10-8
What to do if you set up a fan trap inside a complex folder .....	10-12
What to do if you have a data type mismatch in a join .....	10-13
How to create a new item that converts the Day of Week item from a varchar to a date data type .....	10-14
How to create a join between two items that have the same data type .....	10-15

## 11 Creating and maintaining calculated items

Creating and maintaining calculated items .....	11-1
What are calculated items? .....	11-2
What are derived items? .....	11-3
What are aggregate calculated items? .....	11-3
What restrictions apply to aggregate calculated items? .....	11-4
What are the differences between analytic functions and aggregate calculated items? .....	11-4
What are aggregate derived items? .....	11-5
Example of an aggregate derived item .....	11-5
How to create calculated items .....	11-7
How to edit calculated item properties .....	11-9
How to edit calculated items .....	11-9
How to delete calculated items .....	11-10
Why do you need PL/SQL functions? .....	11-11
What are custom PL/SQL functions? .....	11-11
About registering custom PL/SQL functions .....	11-12
How to register custom PL/SQL functions automatically .....	11-12
How to register custom PL/SQL functions manually .....	11-13

## 12 Creating and maintaining conditions

<b>Creating and maintaining conditions</b> .....	12-1
<b>What are conditions?</b> .....	12-1
About condition categories .....	12-2
How do conditions work in Discoverer? .....	12-3
<b>What are the different types of condition?</b> .....	12-3
<b>How to create simple conditions</b> .....	12-4
<b>How to create advanced conditions</b> .....	12-7
<b>How to edit conditions</b> .....	12-10
<b>How to edit condition properties</b> .....	12-10
<b>How to delete conditions</b> .....	12-11
<b>Example conditions</b> .....	12-11
Example 1: Using a condition to find data for the year 2002 .....	12-12
Example 2: Using a condition to find sales in the last seven days .....	12-12
Example 3: Using a condition to find shipments in Quarter 3.....	12-12
<b>About outer joins and the DisableAutoOuterJoinsOnFilters registry setting</b> .....	12-13
Example 1: No condition applied.....	12-14
Example 2: Condition applied to query and DisableAutoOuterJoinsOnFilters set to 1 (switched off) .....	12-15
Example 3: Condition applied to query and DisableAutoOuterJoinsOnFilters set to 0 (switched on) .....	12-15
<b>How to create row level security using a mandatory condition</b> .....	12-16
<b>How to enable summary folders if a source folder includes a mandatory condition (e.g. with row level security)</b> .....	12-21

## 13 Creating and maintaining hierarchies

<b>Creating and maintaining hierarchies</b> .....	13-1
<b>What are hierarchies?</b> .....	13-1
<b>What are item hierarchies?</b> .....	13-2
<b>What are date hierarchies?</b> .....	13-4
What are date hierarchy templates?.....	13-5
About date hierarchies and performance.....	13-6
Example of how a date hierarchy can affect performance in Discoverer Plus.....	13-6
Example of how performance can be retained.....	13-6
<b>How to create item hierarchies</b> .....	13-7

<b>How to create date hierarchies and templates.....</b>	<b>13-9</b>
<b>How to edit item hierarchies .....</b>	<b>13-12</b>
<b>How to edit date hierarchy templates.....</b>	<b>13-13</b>
<b>How to apply a date hierarchy template to a date item.....</b>	<b>13-14</b>
<b>How to set the default date hierarchy template.....</b>	<b>13-15</b>
<b>How to delete item hierarchies or date hierarchy templates.....</b>	<b>13-16</b>
<b>How to modify default date hierarchies that use date format 'RR' following upgrade to Oracle9i Discoverer Administrator .....</b>	<b>13-18</b>

## **14 Managing summary folders**

<b>Managing summary folders.....</b>	<b>14-1</b>
<b>About folders and summary folders in Discoverer .....</b>	<b>14-2</b>
<b>What are summary folders? .....</b>	<b>14-2</b>
<b>What are Discoverer summary tables? .....</b>	<b>14-3</b>
<b>What are materialized views?.....</b>	<b>14-3</b>
<b>What is Automated Summary Management (ASM).....</b>	<b>14-5</b>
<b>How does ASM work? .....</b>	<b>14-5</b>
<b>What are the prerequisites for creating summary folders with ASM? .....</b>	<b>14-6</b>
<b>What are the different ways to run ASM and when do you use them? .....</b>	<b>14-7</b>
<b>What is the ASM policy?.....</b>	<b>14-8</b>
<b>Why must you refresh summary data?.....</b>	<b>14-8</b>
<b>What happens when a summary folder is refreshed? .....</b>	<b>14-9</b>
<b>How to run ASM using the Summary Wizard.....</b>	<b>14-9</b>
<b>How to run ASM after bulk load using the Load Wizard .....</b>	<b>14-15</b>
<b>How to run ASM using the command line interface.....</b>	<b>14-16</b>
<b>How to run ASM using a batch file and the operating system scheduler.....</b>	<b>14-16</b>
<b>How to configure the database for summary folders .....</b>	<b>14-16</b>
How to confirm that DBMS_JOB is installed for summary management .....	14-17
How to grant the privileges needed to create summary folders.....	14-18
How to determine and reset tablespace quotas .....	14-19
How to check object/schema name.....	14-20
How to set the start time for summary processing .....	14-21
Limiting the number of processing requests that can run simultaneously .....	14-21

## 15 Creating summary folders manually

Creating summary folders manually .....	15-1
What is manual summary folder creation? .....	15-2
What are the prerequisites for creating summary folders manually in Discoverer?.....	15-2
What are summary combinations? .....	15-3
What to consider when defining summary combinations?.....	15-4
Guidelines for setting up summary combinations .....	15-7
When will an expression use a summary folder? .....	15-8
How to create summary folders based on items in the EUL .....	15-9
How to create summary folders based on users' queries.....	15-15
How to create summary folders based on external summary tables .....	15-24
How to manually refresh a summary folder.....	15-31
How to edit the properties of summary folders.....	15-32
How to edit summary folders.....	15-33
How to edit database storage properties of summary combinations for a summary folder .....	15-35
How to delete summary folders.....	15-36
How to view the status of the summary tables/materialized views for a summary folder .....	15-38

## 16 Additional information about summary folders

Additional information about summary folders .....	16-1
What is the context and future for Discoverer's use of summary tables/materialized views? .....	16-2
What is query rewrite? .....	16-2
What are the conditions for query rewrite by Discoverer?.....	16-3
About viewing the SQL and execution plan for query rewrite in Discoverer.....	16-4
About configuring how Discoverer displays SQL in the SQL Inspector dialog.....	16-4
Examples of execution plan (in Discoverer) using/not using a materialized view.....	16-4
Example of the SQL (in Discoverer) where Discoverer rewrites the query .....	16-5
Example illustrating the advantages of rewriting a query to use a summary table.....	16-7
What characteristics differ between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or later)? .....	16-9
What is different about summary folders that are based on external summary tables?...	16-10

<b>What is different between mapping external summary tables and views to EUL items, with Oracle 8.1.7 databases (or later)</b> .....	16-12
<b>About refresh options for Oracle 8.1.7 databases (or later)</b> .....	16-13
<b>About refreshing summary folders following import between Oracle databases</b> .....	16-13

## **17 Using Discoverer with Oracle Applications**

<b>Using Discoverer with Oracle Applications</b> .....	17-1
<b>What are Oracle Applications?</b> .....	17-2
<b>What are Oracle Applications responsibilities?</b> .....	17-2
<b>What features does Discoverer support for Oracle Applications users?</b> .....	17-2
<b>What are the prerequisites for using Discoverer with Oracle Applications?</b> .....	17-3
<b>What is different about running Discoverer in Oracle Applications mode?</b> .....	17-4
Differences with the Discoverer Connect dialog in Oracle Applications mode .....	17-4
Differences with Discoverer security in Oracle Applications mode.....	17-5
Differences with Discoverer summary folders in Oracle Applications mode.....	17-6
Differences with Discoverer and secure views/language settings in Oracle Applications mode .....	17-6
<b>How to configure the Connect dialog for Oracle Applications users</b> .....	17-7
<b>How to create an Oracle Applications EUL</b> .....	17-9
<b>How to grant task privileges to all Oracle Applications users via the Public user</b> .....	17-13
<b>How to specify the Oracle Applications users/responsibilities who can access a business area</b> .....	17-14
<b>How to specify the business areas that an Oracle Applications user/responsibility can access</b> .....	17-14
<b>How to specify the tasks an Oracle Applications user or responsibility can perform</b> .....	17-15
<b>How to specify the Oracle Applications users/responsibilities who can perform a specific task</b> .....	17-15

## **18 Using Discoverer with components of Oracle9i Application Server**

<b>Using Discoverer with components of Oracle9i Application Server</b> .....	18-1
<b>Using Discoverer with Oracle9iAS Enterprise Manager</b> .....	18-1
<b>Using Discoverer with Oracle9iAS Reports</b> .....	18-2
<b>Using Discoverer with Oracle9iAS Web Cache</b> .....	18-2
<b>Using Discoverer with Oracle9i Warehouse Builder</b> .....	18-3
<b>Using Discoverer with Oracle9iAS Login Server</b> .....	18-3

<b>Using Discoverer with Oracle9iAS Portal</b> .....	18-3
What is Oracle9iAS Portal? .....	18-4
About Oracle9iAS Portal.....	18-5
What you need to publish Discoverer content in Oracle9iAS Portal.....	18-6
About portlet types available in Discoverer .....	18-7
About the List of database workbooks portlet.....	18-7
About the Worksheet portlet .....	18-7
About adding portlets.....	18-8
How to add a list of database workbooks portlet.....	18-9
How to add a worksheet portlet.....	18-11
How to edit a portlet .....	18-14

## 19 EUL status workbooks

<b>EUL status workbooks</b> .....	19-1
<b>What are EUL status workbooks?</b> .....	19-1
<b>About the Discoverer EUL V5 business area</b> .....	19-2
<b>How to install the standard EUL status workbooks</b> .....	19-3
<b>How to install Oracle Applications EUL status workbooks</b> .....	19-5
<b>How to run Oracle Applications EUL status workbooks</b> .....	19-6
<b>How to uninstall the Discoverer EUL V5 business area</b> .....	19-7
<b>About the EUL Data Definition workbook</b> .....	19-8
<b>About the Query Statistics workbook</b> .....	19-9
<b>Notes on EUL status workbooks and the table DBA_JOBS_RUNNING</b> .....	19-9

## 20 Predicting query performance

<b>Predicting query performance</b> .....	20-1
<b>About predicting query performance</b> .....	20-1
<b>How does query prediction work in Discoverer Plus?</b> .....	20-2
<b>Why might query prediction not be available?</b> .....	20-2
<b>About improving the speed and accuracy of query prediction</b> .....	20-3
<b>How to make the necessary database views available for query prediction</b> .....	20-3
<b>How to verify and change the timed_statistics parameter for query prediction</b> .....	20-4
<b>How to analyze data tables</b> .....	20-5
<b>How to verify and change the optimizer_mode parameter for query prediction</b> .....	20-6
<b>How to reduce long query prediction times</b> .....	20-7

How to use query prediction with secure views .....	20-9
How to delete old query prediction statistics .....	20-10

## 21 Discoverer command line interface

Discoverer command line interface .....	21-1
What is the Discoverer command line interface? .....	21-2
What is a command?.....	21-2
What is a command modifier?.....	21-2
About using the Discoverer command line interface.....	21-3
What privileges are required to run the command line interface? .....	21-4
Notes on using commands .....	21-4
What command syntax conventions does this guide use?.....	21-5
What is the syntax for commands?.....	21-6
Examples of commands .....	21-6
What is a command file? .....	21-7
How to create a command file .....	21-7
How to run a command file .....	21-7
Examples of command files.....	21-8
Quick guide to Discoverer Administrator commands .....	21-9
Discoverer Administrator command reference.....	21-11
/? .....	21-11
/apps_fndnam .....	21-11
/apps_user.....	21-12
/asm .....	21-12
/cmdfile .....	21-12
/connect.....	21-13
/create_eul .....	21-13
/create_eul /apps_mode .....	21-14
/delete .....	21-15
/delete_bus_area.....	21-16
/delete_eul.....	21-17
/export (EUL objects).....	21-17
/import (Business Area).....	21-19
/import (EUL objects).....	21-20
/load.....	21-21

/refresh_bus_area.....	21-23
/refresh_folder.....	21-24
/refresh_summary.....	21-25
<b>Discoverer Administrator command modifier reference.....</b>	<b>21-26</b>
/aggregate.....	21-27
/all.....	21-27
/apps_grant_details.....	21-27
/apps_responsibility.....	21-27
/apps_security_group.....	21-28
/asm_space, /asm_tablespace.....	21-28
/audit_info.....	21-28
/ba_link.....	21-29
/business_area.....	21-29
/capitalize.....	21-29
/condition.....	21-29
/date_hierarchy.....	21-29
/db_link.....	21-30
/description.....	21-30
/eul.....	21-30
/eul_language.....	21-31
/external_element.....	21-31
/folder.....	21-31
/function.....	21-32
/hier_node.....	21-32
/hierarchy.....	21-32
/identifier.....	21-32
/insert_blanks.....	21-33
/item.....	21-33
/item_class.....	21-33
/join.....	21-33
/keep_folder.....	21-34
/keep_format_properties.....	21-34
/log.....	21-34
/log_only.....	21-35
/lov.....	21-35



/object .....	21-35
/overwrite .....	21-35
/parameter .....	21-36
/password .....	21-36
/private .....	21-36
/refresh .....	21-36
/remove_prefix .....	21-37
/rename .....	21-37
/schema .....	21-37
/show_progress .....	21-37
/sort_folders .....	21-38
/sort_items .....	21-38
/source .....	21-38
/summary .....	21-39
/user .....	21-39
/workbook .....	21-39
/xmlworkbook .....	21-39
<b>Discoverer Desktop command reference .....</b>	<b>21-39</b>
/? .....	21-40
/batch .....	21-40
/connect .....	21-40
/export .....	21-41
/open .....	21-41
/opendb .....	21-42
/parameter .....	21-42
/p .....	21-42
/pt .....	21-43
/sheet .....	21-43

## 22 Discoverer registry settings

<b>Discoverer registry settings .....</b>	<b>22-1</b>
<b>What are Discoverer registry settings? .....</b>	<b>22-1</b>
<b>About Discoverer Plus and Discoverer Viewer registry settings .....</b>	<b>22-2</b>
<b>About Discoverer Administrator and Discoverer Desktop registry settings .....</b>	<b>22-2</b>
<b>What are the Discoverer Administrator and Discoverer Desktop registry settings? .....</b>	<b>22-3</b>

How to edit Discoverer Administrator and Discoverer Desktop registry settings.....	22-8
--	------

## 23 Discoverer support for Oracle Rdb, and non-Oracle databases

<b>Discoverer support for Oracle Rdb and non-Oracle databases .....</b>	<b>23-1</b>
<b>Discoverer support for Oracle Rdb .....</b>	<b>23-1</b>
What are the software requirements for using Discoverer with Oracle Rdb?.....	23-1
Which Discoverer features are not supported by Oracle Rdb?.....	23-3
Which Discoverer features are partially supported by Oracle Rdb? .....	23-4
<b>Discoverer support for non-Oracle databases using native ODBC drivers .....</b>	<b>23-5</b>
What are the software requirements for Discoverer to support non-Oracle databases using native ODBC drivers? .....	23-5
Which Discoverer features are not supported by non-Oracle databases using native ODBC drivers? .....	23-6
Which Discoverer features are only partially supported by non-Oracle databases using native ODBC drivers? .....	23-7
Which Discoverer features are implemented differently by non-Oracle databases using native ODBC drivers? .....	23-9
Why does Discoverer require a list of known database users?.....	23-9
How to use Discoverer with non-Oracle databases using native ODBC drivers.....	23-10
<b>Discoverer support for non-Oracle databases using generic connectivity.....</b>	<b>23-11</b>
What is generic connectivity? .....	23-11
How to set up generic connectivity.....	23-11
What are the advantages of using generic connectivity?.....	23-12
<b>Discoverer support for non-Oracle databases using the Transparent Gateway .....</b>	<b>23-12</b>

## 24 Upgrading to Discoverer Version 9.0.2

<b>Upgrading to Discoverer Version 9.0.2 .....</b>	<b>24-1</b>
<b>About upgrading to Discoverer Version 9.0.2 .....</b>	<b>24-1</b>
<b>What are the prerequisites for upgrading to Discoverer Version 9.0.2?.....</b>	<b>24-2</b>
<b>Upgrade step 1: Back up the Release 4.1 EUL.....</b>	<b>24-3</b>
<b>Upgrade step 2: Upgrade the Release 4.1 EUL.....</b>	<b>24-3</b>
<b>Upgrade step 3: Refresh summary folders.....</b>	<b>24-5</b>
<b>Upgrade step 4: Migrate users to Discoverer Version 9.0.2.....</b>	<b>24-7</b>
<b>Upgrade step 5: Remove the Release 4.1 EULs.....</b>	<b>24-8</b>
<b>Upgrade step 6: Remove Discoverer Release 4.1 products from client machines.....</b>	<b>24-10</b>

<b>Notes about upgrading to Discoverer version 9.0.2 .....</b>	<b>24-11</b>
Notes about upgrading Oracle Applications EULs.....	24-11
Notes about upgrading EULs that contain analytic functions.....	24-11

## **Part II Reference information**

### **25 Reference dialogs**

<b>Reference dialogs.....</b>	<b>25-1</b>
<b>List of reference dialogs .....</b>	<b>25-1</b>
<b>Add Combinations of Items dialog.....</b>	<b>25-6</b>
<b>Add Items to Summary Folder dialog .....</b>	<b>25-9</b>
<b>Alphabetical Sort dialog.....</b>	<b>25-10</b>
<b>Business Area Properties dialog .....</b>	<b>25-11</b>
<b>Changing Identifier Warning dialog .....</b>	<b>25-12</b>
<b>Choose Folder dialog (Item, Condition, Join) .....</b>	<b>25-13</b>
<b>Condition Properties dialog .....</b>	<b>25-14</b>
<b>Choose user or table/view dialog .....</b>	<b>25-16</b>
<b>Confirm Business Area Delete dialog .....</b>	<b>25-17</b>
<b>Confirm Delete dialog .....</b>	<b>25-18</b>
<b>Confirm Folder Delete dialog .....</b>	<b>25-19</b>
<b>Create EUL Wizard dialog.....</b>	<b>25-20</b>
<b>Connect dialog.....</b>	<b>25-22</b>
<b>Create EUL Wizard: Step 2 dialog (Oracle Applications users).....</b>	<b>25-24</b>
<b>Create EUL Wizard: Step 2 dialog.....</b>	<b>25-25</b>
<b>Custom Folder dialog.....</b>	<b>25-26</b>
<b>Custom Folder Properties dialog.....</b>	<b>25-27</b>
<b>Workarea: Data tab .....</b>	<b>25-28</b>
<b>Database Information dialog.....</b>	<b>25-29</b>
<b>Database Storage Properties dialog: List of tabs .....</b>	<b>25-30</b>
<b>Database Storage Properties dialog: 8i Properties tab.....</b>	<b>25-31</b>
<b>Database Storage Properties dialog: Mappings tab .....</b>	<b>25-33</b>
<b>Database Storage Properties dialog: Properties tab .....</b>	<b>25-34</b>
<b>Database Storage Properties dialog: Tablespaces tab.....</b>	<b>25-36</b>
<b>Date formats dialog.....</b>	<b>25-37</b>
<b>Delete EUL dialog.....</b>	<b>25-39</b>

<b>Edit Calculation dialog</b> .....	25-40
<b>EUL Manager dialog</b> .....	25-43
<b>EUL Upgrade Error dialog</b> .....	25-44
<b>EUL Upgrade dialog</b> .....	25-45
<b>Export Wizard Step 1 dialog</b> .....	25-46
<b>Export Wizard: Step 2 dialog (selected business areas)</b> .....	25-47
<b>Export Wizard Step 2 dialog (choose objects)</b> .....	25-48
<b>Export Wizard dialog - final step - save file</b> .....	25-49
Save As dialog .....	25-50
<b>Folder Properties dialog</b> .....	25-51
General tab .....	25-51
Dependents tab .....	25-53
Components tab (complex folders) .....	25-53
<b>Workarea: Hierarchies tab</b> .....	25-54
<b>Hierarchy Wizard dialog</b> .....	25-55
<b>Impact dialog</b> .....	25-56
<b>Import PL/SQL Functions dialog</b> .....	25-58
<b>Import Wizard: Step 1 dialog</b> .....	25-59
<b>Import Wizard: Step 2 dialog</b> .....	25-60
<b>Import Wizard: Step 3 dialog</b> .....	25-62
<b>Install Tutorial Wizard Step 3 dialog</b> .....	25-64
<b>Install/Uninstall Tutorial Wizard Step 1 dialog</b> .....	25-65
Install Tutorial Wizard Step 1 .....	25-65
Uninstall Tutorial Wizard Step 1 .....	25-65
<b>Install/Uninstall Tutorial Wizard Step 2 dialog</b> .....	25-66
Install Tutorial Wizard Step 2 .....	25-66
Uninstall Tutorial Wizard Step 2 .....	25-66
<b>Item Class Wizard dialog</b> .....	25-68
<b>Item Class Wizard: Advanced options for list of values dialog</b> .....	25-69
<b>Item Class Wizard: Choose Attributes dialog</b> .....	25-72
<b>Item Class Wizard: Select Item dialog (if you chose alternative sort)</b> .....	25-73
<b>Item Class Wizard: Select Item dialog (on which to base LOV)</b> .....	25-74
<b>Item Class Wizard dialog (select items that use this item class)</b> .....	25-75
<b>Workarea: Item Classes tab</b> .....	25-76
<b>Item Properties dialog</b> .....	25-77

<b>Items dialog</b> .....	25-82
<b>Items that use date hierarchy dialog</b> .....	25-83
<b>Join Options dialog</b> .....	25-84
<b>Join Properties dialog</b> .....	25-86
General.....	25-86
Dependents.....	25-87
<b>Load Wizard: Step 1 dialog</b> .....	25-89
<b>Load Wizard: Step 2 dialog</b> .....	25-91
<b>Load Wizard: Step 3 dialog</b> .....	25-92
<b>Load Wizard: Step 4 dialog</b> .....	25-93
<b>Load Wizard: Step 5 dialog</b> .....	25-97
<b>Manage Folders dialog: Business Area &gt; Folder tab</b> .....	25-99
<b>Manage Folders dialog: Folder &gt; Business Area tab</b> .....	25-100
<b>Manage Scheduled Workbooks dialog</b> .....	25-101
<b>Name hierarchy dialog</b> .....	25-104
<b>Name Summary Folder dialog</b> .....	25-105
For summary folders based on summary tables or materialized views.....	25-105
For summary folders based on external summary tables.....	25-106
<b>New Condition dialog (Advanced)</b> .....	25-107
<b>New Condition dialog (Choose object for)</b> .....	25-110
<b>New/Edit Condition dialog</b> .....	25-111
<b>New Date Format dialog</b> .....	25-114
<b>New Item dialog (Choose Folder for Item)</b> .....	25-115
<b>New Item dialog</b> .....	25-116
<b>New Join dialog (Choose folder)</b> .....	25-119
<b>New Join/Edit Join dialog</b> .....	25-120
<b>New Multi-Item Join dialog</b> .....	25-123
<b>Online Dictionary Options dialog</b> .....	25-125
<b>Open Business Area dialog</b> .....	25-127
<b>Options dialog: Default EUL tab</b> .....	25-128
<b>Options dialog: Connection tab</b> .....	25-129
Connection tab.....	25-129
<b>PL/SQL Functions dialog: Arguments tab</b> .....	25-131
<b>PL/SQL Functions dialog: Functions tab</b> .....	25-133
<b>Privileges dialog: Privileges tab</b> .....	25-136

<b>Privileges dialog: Query Governor tab</b> .....	25-139
<b>Privileges dialog: Scheduled Workbooks tab</b> .....	25-141
<b>Privileges dialog: User/Role tab</b> .....	25-143
<b>Properties dialogs</b> .....	25-145
<b>Refresh Business Area dialog</b> .....	25-146
<b>Refresh Summaries dialog</b> .....	25-147
<b>Refresh Summary Folder dialog</b> .....	25-149
For summary folders (based on Discoverer summary tables or materialized views) refreshed by Discoverer .....	25-149
For summary folders (based on external summary tables) refreshed by another application .....	25-150
<b>Refresh Wizard dialog</b> .....	25-151
Refresh Wizard Step 1 .....	25-151
Refresh Wizard Step 2.....	25-151
<b>Repository Users dialog</b> .....	25-152
<b>Responsibilities dialog</b> .....	25-153
<b>Schedule Workbooks dialog: General tab</b> .....	25-154
<b>Schedule Workbook dialog: Schedule tab</b> .....	25-155
<b>Security dialog: Business Area - &gt; User tab</b> .....	25-156
<b>Security dialog: Users - &gt; Business Area tab</b> .....	25-158
<b>Select Default EUL dialog</b> .....	25-160
<b>Select items to include in this hierarchy dialog</b> .....	25-161
<b>Workarea: Summaries tab</b> .....	25-163
<b>Summary Properties dialog</b> .....	25-165
<b>Summary Wizard (ASM): List of dialogs</b> .....	25-168
<b>Summary Wizard (ASM): Change default settings: List of dialog tabs</b> .....	25-169
<b>Summary Wizard (ASM): Change default settings dialog: Folders tab</b> .....	25-170
<b>Summary Wizard (ASM): Change default settings dialog: Analyze tab</b> .....	25-171
<b>Summary Wizard (ASM): Change default settings dialog: Deletion tab</b> .....	25-173
<b>Summary Wizard (ASM): Change default settings dialog: Query Usage tab</b> .....	25-175
<b>Summary Wizard (ASM): Change default settings dialog: Query User tab</b> .....	25-177
<b>Summary Wizard (ASM): Not Analyzed dialog</b> .....	25-178
<b>Summary Wizard (ASM): Recommended Summaries dialog</b> .....	25-180
<b>Summary Wizard (ASM): Step 2 Analyze Folders dialog</b> .....	25-182
<b>Summary Wizard (ASM): Step 3 Allocate Space dialog</b> .....	25-184
<b>Summary Wizard: Step 1 dialog</b> .....	25-186

<b>Summary Wizard: Step 2 dialog</b> .....	25-187
<b>Use Query Statistics dialog</b> .....	25-189
<b>Using External Tables dialog</b> .....	25-191
<b>Using Help</b> .....	25-193
<b>Values dialog</b> .....	25-194

## **Glossary**

## **Index**





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# Send us your comments

Oracle9i Discoverer Administrator Administration Guide, Version 9.0.2

Part No. A90881-02

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# Preface

Welcome to Oracle9i Discoverer Administrator - the tool for setting up and maintaining Discoverer systems.

Discoverer Administrator enables you to control and manage your Discoverer system so that users of Discoverer Plus and Discoverer Viewer can find the information they want.

## Intended Audience

Use this guide if you are responsible for managing a Discoverer system, and you want to know how to:

- create and maintain End User Layers
- set up business areas, folders and items
- help users find information by defining joins, calculated items, and conditions
- improve Discoverer performance using summary folders

## Structure

This manual contains the following chapters:

- Part I Conceptual and task information
  - ["Introducing Oracle9i Discoverer Administrator"](#)
  - ["Getting started with Discoverer Administrator"](#)
  - ["Creating and maintaining End User Layers"](#)
  - ["Creating and maintaining business areas"](#)

- "Creating and maintaining folders"
- "Managing connections to Discoverer"
- "Controlling access to information"
- "Scheduling workbooks"
- "Maintaining items and item classes"
- "Creating and maintaining joins"
- "Creating and maintaining calculated items"
- "Creating and maintaining conditions"
- "Creating and maintaining hierarchies"
- "Managing summary folders"
- "Creating summary folders manually"
- "Additional information about summary folders"
- "Using Discoverer with Oracle Applications"
- "Using Discoverer with components of Oracle9i Application Server"
- "EUL status workbooks"
- "Predicting query performance"
- "Discoverer command line interface"
- "Discoverer registry settings"
- "Discoverer support for Oracle Rdb and non-Oracle databases"
- "Upgrading to Discoverer Version 9.0.2"
- Part II Reference information
  - "Reference dialogs"

## Related Documents

For more information, see the following manuals:

- *Oracle9iAS Discoverer Plus User's Guide*
- *Oracle9iAS Discoverer Plus Tutorial*
- *Oracle9i Discoverer Administrator Tutorial*

- *Oracle9iAS Discoverer Configuration Guide*

## Conventions

The following conventions are used in this manual:

Convention	Meaning
File   New	Menu options are shown with a vertical bar separating the menu and the name of the option. For example, File   New shows the selection of the New option from the File menu.
<b>bold type</b>	Bold type is used to distinguish field names in Discoverer dialogs.
<i>italic type</i>	Italic type is used for the names of other Oracle publications.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.
monotype	Characters you type are shown in monotype.

Discoverer often gives you several ways to perform an operation. For example, to create a new condition you could:

- choose Tools | Conditions
- click the Conditions toolbar button

Since you might not be using a mouse, the Discoverer documentation always tells you the menu and menu option to choose.

## Oracle Discoverer Navigation and Accessibility

### Keyboard Navigation

Oracle Discoverer supports standard keyboard navigation. Standard keyboard navigation includes the use of the tab key, mnemonics (using the Alt key and the underlined character), and accelerators (such as Alt+F4 to exit a window).

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# Part I

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## Conceptual and task information

This section contains conceptual and task information about Oracle9i Discoverer Administrator.





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# Introducing Oracle9i Discoverer Administrator

## Introducing Oracle9i Discoverer Administrator

This chapter introduces you to Oracle9i Discoverer Administrator, and includes the following topics:

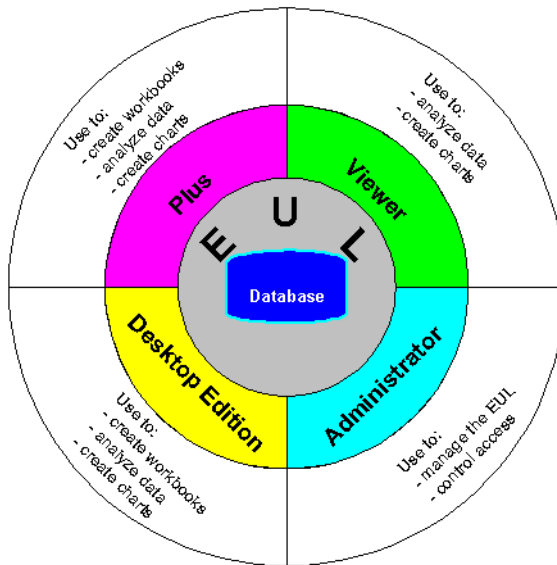
- "What is Oracle Discoverer?"
- "What is Oracle9i Discoverer Administrator?"
- "What is your role as a Discoverer manager?"
- "Basic concepts for Discoverer managers"
- "What are the steps to a successful Discoverer implementation?"
- "What is involved in maintaining a Discoverer system?"
- "What are the new features in Discoverer Administrator Version 9.0.2?"

## What is Oracle Discoverer?

Oracle Discoverer is a business intelligence toolset that comprises:

- Oracle9i Discoverer Administrator
- Oracle9iAS Discoverer Plus
- Oracle9iAS Discoverer Viewer
- Oracle Discoverer Desktop

**Figure 1–1 The Discoverer components**



All of the Discoverer tools rely on the Discoverer End User Layer (EUL). The EUL is a set of database tables that contain information (or 'metadata') about the other tables and views in the database.

## What is Oracle9i Discoverer Administrator?

Oracle9i Discoverer Administrator is one of the components of Oracle Discoverer. Discoverer Administrator is a tool to hide the complexity of the database from business users, so they can answer business questions quickly and accurately using Oracle Discoverer.

Discoverer Administrator's wizard-style interfaces enable you to:

- set up and maintain the End User Layer (EUL)
- control access to information
- create conditions and calculations for Discoverer end users to include in their worksheets

Users of Discoverer Administrator are called Discoverer managers.

Oracle9i Discoverer Administrator is shipped as part of Oracle9i Developer Suite, which is a complete suite of application development and administration tools.

## What is your role as a Discoverer manager?

As a Discoverer manager, you are responsible for:

- the initial implementation of the Discoverer system
- the ongoing administration and maintenance of the Discoverer system

To fulfill your role as a Discoverer manager, you need to understand how to design business areas that support your company's decision-makers. On the database side, you need to know what data is in the database, where it is located, how it is stored, and how it relates to other data. On the business side, you need to know what data the decision-makers require, what kinds of analysis is necessary, and how the final results should be presented for easy comprehension.

## Basic concepts for Discoverer managers

Before you start using Discoverer Administrator, you will find it helpful to familiarize yourself with some basic concepts:

- ["What is business intelligence?"](#)
- ["What are relational databases, OLTP systems, and data warehouses?"](#)
- ["What are the fundamental concepts behind a Discoverer system?"](#)
- ["How does Discoverer work?"](#)

## What is business intelligence?

Business intelligence is the ability to analyze data to answer business questions and predict future trends.

Oracle Discoverer is a great business intelligence tool because it enables users to analyze data in an ad hoc way. Instead of relying on IT specialists to pre-define queries and reports, Discoverer users can choose the data to analyze and can continue manipulating results until they have the necessary information to take business decisions. Oracle Discoverer also enables users to share the results of their data analysis with their colleagues in different formats (including charts and Excel spreadsheets).

## What are relational databases, OLTP systems, and data warehouses?

A relational database stores data in tables that are composed of rows and columns that contain data values. The overall structure of a relational database management system (RDBMS) can be set up in any number of ways, depending on how the system will be used.

A typical RDBMS is designed for online transaction processing (OLTP), with the main objective of storing vast quantities of transaction data as efficiently as possible. OLTP system design is primarily concerned with getting data into an RDBMS. An OLTP system contains the information that a business uses on a day-to-day basis. The information in an RDBMS designed for an OLTP system is typically process-oriented, current, and subject to change.

A data warehouse is an RDBMS with a structure designed to facilitate data analysis, rather than simply efficient storage of information. Data warehouse design is primarily concerned with getting data out of an RDBMS. The information in a data warehouse is typically subject-oriented, historical, and static.

Oracle Discoverer provides business users with data analysis capabilities, regardless of whether the RDBMS was designed for an OLTP system or as a data warehouse.

## What are the fundamental concepts behind a Discoverer system?

Before you design and implement a Discoverer system, you need to become familiar with some fundamental Discoverer concepts.

These fundamental concepts are described briefly in the sections below:

- ["Introducing the End User Layer"](#)
- ["Introducing business areas"](#)
- ["Introducing folders and items"](#)
- ["Introducing workbooks and worksheets"](#)
- ["Introducing hierarchies and drills"](#)
- ["Introducing summary folders"](#)

Each of the above sections is only a brief description, but includes a cross-reference to other chapters in this manual where you can find more information.

### Introducing the End User Layer

The End User Layer (EUL) insulates Discoverer end users from the complexity and physical structure of the database. The EUL provides an intuitive, business-focused

view of the database that you can tailor to suit each Discoverer end user or user group. The EUL enables Discoverer end users to focus on business issues instead of data access issues. It helps Discoverer end users produce queries by generating SQL and provides a rich set of default settings to aid report building.

The metalayer structure of the EUL preserves the data integrity of the database. Whatever the Discoverer manager or the Discoverer end user does with Discoverer, it affects only the metadata in the EUL and not the database.

The EUL is a collection of approximately 50 tables in the database. These are the only tables that can be modified through Discoverer Administrator. Business areas are defined in Discoverer Administrator using the EUL database tables. Discoverer provides read-only access to the application database.

For more information about the EUL, see [Chapter 3, "Creating and maintaining End User Layers"](#).

### **Introducing business areas**

Typically, no single user (or group of users) is interested in all the information in the database. The users are much more likely to be interested in a subset of the information that is connected in some way to the job that they do. Using Discoverer Administrator, you create one or more business areas as containers of related information.

Having created a business area, you load the database tables containing the related information into that business area.

For more information about business areas, see [Chapter 4, "Creating and maintaining business areas"](#).

### **Introducing folders and items**

The tables and views you load into a business area are presented to Discoverer end users as folders. The columns within a table or view are presented as items.

Often the database tables and columns have names that users will not find meaningful. Using Discoverer Administrator, you can make the names of folders and items more helpful than the names of the tables and columns on which they are based.

The folders in a business area do not have to be based directly on database tables or views. You can create complex folders that contain items based on columns from multiple tables or views. You can also create custom folders based on SQL statements you write yourself.

Similarly, the items in a business area do not have to be based directly on columns. You can create calculated items that perform calculations on several columns, or that make use of the analytic functions available within the Oracle database.

For more information about folders and items, see:

- [Chapter 5, "Creating and maintaining folders"](#)
- [Chapter 9, "Maintaining items and item classes"](#)
- [Chapter 11, "Creating and maintaining calculated items"](#)

### **Introducing workbooks and worksheets**

Oracle Discoverer end users analyze information by including items in worksheets and using Discoverer's data analysis and charting wizards to find the information they are interested in. Discoverer worksheets are grouped into workbooks. A workbook can be stored on the file system or in the database.

In some cases, you will want to restrict Discoverer end users to analyzing information in worksheets that have been created for them. In other situations, it will be more appropriate to allow end users to create their own worksheets. Discoverer Administrator enables you to decide which end users can create their own workbooks, and which end users can only use workbooks that have been created for them.

For more information about workbooks and worksheets, see *Oracle9iAS Discoverer Plus User's Guide*.

### **Introducing hierarchies and drills**

Hierarchies are logical relationships between items that enable users to drill up and down to view information in more or less detail. To analyze information effectively, Discoverer end users will want to:

- drill down to see more detail about a particular piece of information (e.g. if the sales total for a specific region is disappointing, an end user will typically want to drill into the region's sales total figure to see which cities within that region have under-performed)
- drill up to see how the detail data contributes to information at a higher level (e.g. when looking at the sales figure for a particular city, an end user will typically want to drill up to see the total sales figure for the region)

When you load tables into a business area, Discoverer automatically creates default date hierarchies for date items. Often you will want to create your own hierarchies for other items as well.

For more information about hierarchies, see [Chapter 13, "Creating and maintaining hierarchies"](#).

### **Introducing summary folders**

Summary folders are a representation of queried data that has been saved for reuse.

You create summary folders with Discoverer Administrator to improve query response time for end users. The response time of a query is improved because the query accesses pre-aggregated and pre-joined data rather than accessing the database tables. You can also direct Discoverer to use summary folders based on tables containing summary data that have been created by another application. These tables are known as external summary tables.

For more information about summary folders, see:

- [Chapter 14, "Managing summary folders"](#)
- [Chapter 15, "Creating summary folders manually"](#)
- [Chapter 16, "Additional information about summary folders"](#)

## **How does Discoverer work?**

Users' requests for information from the database are in the form of worksheets.

When a user creates or opens a worksheet, Discoverer:

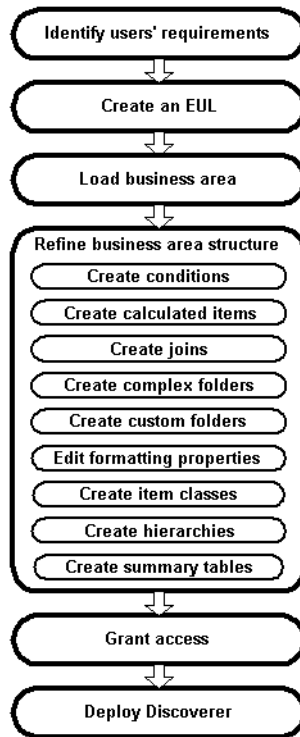
- converts the worksheet into the corresponding SQL statements (e.g. by converting folder names and item names to table names and column names respectively)
- sends the SQL statements to the database
- displays the result set that is returned from the database

In the case of Discoverer Plus and Discoverer Viewer, the SQL statements are routed to the database via Discoverer processes running on an application server machine.

## **What are the steps to a successful Discoverer implementation?**

There are essentially six steps to the implementation of a Discoverer system, as shown in the flowchart below:

**Figure 1–2 Discoverer implementation flowchart**



These six steps are described in more detail below.

### 1. Identify users' requirements

For a Discoverer implementation to be successful, it must meet users' requirements. To find out what those requirements are, conduct interviews with key users and ask them questions like:

- what information do you use now?
- what information would you like to see?
- how would you like the information presented?

As a starting point, why not review the reports and information sources that users are currently using? You will quickly see how using Discoverer will give



users both access to the information they currently use and the ability to analyze that information in new and powerful ways.

Remember that users' requirements typically change over time. Often the biggest changes are requested by users when a system has been rolled out. When users see what Discoverer can do for them, they soon have suggestions for other areas where it could be useful.

Try and anticipate changing requirements. After all, a successful system often starts by meeting a subset of requirements and is then modified over time based on user feedback.

**2. Create an EUL (mandatory if one does not exist already).**

An EUL must exist before you can create a business area. If an EUL does not already exist, you must create one.

**3. Create a business area and load data into it (mandatory).**

Having identified users' requirements, you will have a good idea of the information that users need to access. For example, one group of users might want to access sales information, another group might want to access manufacturing information, and so on.

In Discoverer, you group information with a common business purpose into a business area. Having created a business area, you must specify which database tables and views hold that information. You do this by 'loading' the tables and views into the business area.

**4. Refine the structure of the business area so that users can view data in the most flexible and understandable way.**

The default settings and contents of a business area are sufficient to enable users to access and analyze data. However, Discoverer Administrator provides you with a number of features to enhance the default analysis capabilities.

Specifically, you can:

- create optional and mandatory conditions to restrict the number of rows returned in a folder (for more information, see [Chapter 12, "Creating and maintaining conditions"](#))
- create calculated items to relieve users of the task of creating complex calculations by providing them with ready-made computations (for more information, see [Chapter 11, "Creating and maintaining calculated items"](#))

- create joins to combine folders that were not automatically joined when tables were loaded from the database (for more information, see [Chapter 10, "Creating and maintaining joins"](#))
  - combine folders into complex folders to completely hide joins and relational structures from users (for more information, see [Chapter 5, "How to create complex folders"](#))
  - create custom folders, to represent a result set returned by a SQL statement that you have entered as a folder with items (for more information, see [Chapter 5, "How to create custom folders"](#))
  - edit item names, descriptions, and other formatting information to make data easier to understand (for more information, see [Chapter 9, "How to edit item properties"](#))
  - create item classes to support lists of values, alternative sorts, and drill to detail (for more information, see [Chapter 9, "What are item classes?"](#))
  - create hierarchies to simplify drill-down operations (for more information, see [Chapter 13, "Creating and maintaining hierarchies"](#))
  - create summary tables (or let Discoverer automate summary management, or register existing summary tables) to maximize query performance (for more information, see [Chapter 14, "Managing summary folders"](#))
- 5. Grant business area access to users or roles (mandatory).**

Having identified users' requirements, you will have a good idea of which users (and groups of users) need access to which information.

In some cases, different users will want access to the same information. For example, information about an employee might be required by the employee's manager, payroll staff, and users in the Human Resources department.

In other cases, it is appropriate for only one group of users to have access to the information. For example, information about an engineering project is invaluable for a project manager but of no interest to payroll staff.

Keeping users' information requirements in mind, you can grant users access to the business area.

Note that Discoverer users (whether end users or managers) never compromise the security of the underlying database. Users cannot see information in Discoverer to which they do not already have sufficient database privileges to access. In other words, all Discoverer security and privileges are additional to the database security mechanisms.

## 6. Deploy Discoverer

Users' requirements will determine which of the Discoverer components you decide to make available in your company.

When identifying their requirements, you will probably have realized that some users want the ability to create their own worksheets, while other users simply want to use worksheets that have been created for them. In addition, some users will want to run Discoverer using a Web browser, using either a Java applet user interface or an HTML user interface.

Use the table below as a guide to decide which Discoverer components to deploy in your organization.

User requirement	Plus	Viewer	Desktop
Install and run Discoverer on a PC running Windows	No	No	Yes
Run Discoverer using a Web browser	Yes	Yes	No
Build new worksheets	Yes	No	Yes
Save workbooks to the file system	No	No	Yes
Customize Discoverer user interface	No	Yes	No

Other factors will probably also influence your decision, including network performance and security issues.

Having decided which Discoverer components to deploy, refer to the appropriate documentation for specific installation or configuration instructions.

## What is involved in maintaining a Discoverer system?

Having implemented a Discoverer system, you will probably find that a small amount of ongoing maintenance is required to make sure that Discoverer continues to meet users' requirements.

Typically, you will continue to refine business areas by:

- adding new item classes, to support new lists of values, alternative sorts, and drill to detail (for more information, see [Chapter 9, "Maintaining items and item classes"](#))

- adding new joins, to combine folders that were not automatically joined when tables were loaded from the database and which users now need access to in the same worksheet (for more information, see [Chapter 10, "Creating and maintaining joins"](#))
- adding new optional and mandatory conditions, to restrict the number of rows returned in a folder (for more information, see [Chapter 12, "Creating and maintaining conditions"](#))
- adding new calculated items, to provide users with ready-made computations that were not initially required (for more information, see [Chapter 11, "Creating and maintaining calculated items"](#))
- adding new complex folders, to simplify query creation (for more information, see [Chapter 5, "How to create complex folders"](#))
- adding new custom folders, to meet users' requirements that cannot be met using conventional folders (for more information, see [Chapter 5, "How to create custom folders"](#))
- adding new hierarchies, to enable users to analyze data in new ways (for more information, see [Chapter 13, "Creating and maintaining hierarchies"](#))
- adding new summaries to resolve performance issues with particular queries (for more information see [Chapter 14, "Managing summary folders"](#))

In addition to the above, you will probably have to change which users have access to which business areas and the operations that individual users can perform in those business areas. For example:

- when a new user joins, you will have to grant them access to the business areas they need to do their job
- when an existing user changes jobs or departments, you might have to grant them access to new business areas, or revoke their access from previous business areas

For more information, see [Chapter 7, "Controlling access to information"](#).

## What are the new features in Discoverer Administrator Version 9.0.2?

Discoverer Administrator Version 9.0.2 contains the following new and improved features:

- Enhanced export - Export End User Layer (EUL) objects to a file using the Discoverer Administrator user interface. The EUL objects that you can export to

a file include business areas, folders, item hierarchies, date hierarchies, item classes, workbook definitions (created in Discoverer Desktop and Discoverer Plus), PL/SQL function registration information, summary folders and the automated summary management (ASM) policy. For more information, see [Chapter 3, "About copying EULs and EUL objects by exporting and importing"](#).

- Alphabetical sorting - Sort folders and items when you load a business area. You can also sort folders in a business area and sort the items in a folder from within the Workarea. (for more information, see [Chapter 4, "How to create a business area using the Load Wizard"](#), [Chapter 21, "/load"](#) and [Chapter 5, "Creating and maintaining folders"](#)).
- EUL cross references - View the impact that deleting EUL objects will have on Discoverer workbooks. For example, Discoverer Administrator can tell you whether a folder you are deleting is referenced by a specific workbook and whether the workbook will be affected by deleting the folder (for more information about deleting folders, see [Chapter 5, "How to delete folders from a business area"](#)).
- Improved list of values - Specify in Discoverer Administrator how Discoverer Plus users select and display LOV options. You can determine the maximum number of rows to display to an end user (for each array fetch of data from the database), when a list of values is expanded in Discoverer Plus. You can also specify to hide duplicate values, cache the LOV once it has first been displayed and force end users to enter search criteria for long LOVs (for more information, see ["Item Class Wizard: Advanced options for list of values dialog"](#)).

What are the new features in Discoverer Administrator Version 9.0.2?

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# Getting Started with Discoverer Administrator

## Getting started with Discoverer Administrator

This chapter explains how to start using Discoverer Administrator, and includes the following topics:

- ["What are the prerequisites for using Oracle Discoverer?"](#)
- ["How to start Discoverer Administrator"](#)
- ["What is the Workarea?"](#)
- ["About Discoverer Administrator documentation and online help"](#)

## What are the prerequisites for using Oracle Discoverer?

### What are the system prerequisites?

Before you can use Discoverer Administrator:

- A suitable database must be installed and available. An Oracle 8.1.7 (or later) database will support the use of materialized views to improve the performance of summary folders.
- Discoverer Administrator must have been installed on a PC, typically as part of a full Oracle9iDS installation.

Before end users can use Discoverer, either one or both of the following must have been installed:

- Discoverer Plus and Discoverer Viewer must have been installed on an application server machine and configured correctly as part of an Oracle9iAS installation (for more information, see the *Oracle9iAS Discoverer Configuration Guide*)
- Discoverer Desktop must have been installed on users' PCs.

## What are the data access prerequisites?

To create and maintain a Discoverer system using Discoverer Administrator, you will require certain Discoverer privileges and database privileges:

- to create an EUL you must have the privileges described in:
  - [Chapter 3, "What privileges do you need to create an End User Layer in an Oracle database?"](#)
  - [Chapter 3, "What privileges do you need to create an End User Layer in a non-Oracle database?"](#)
- to manage an EUL you must have:
  - the Discoverer Administration privilege on the EUL
  - the Allow Administration privilege on business areas you want to modify
  - the SELECT database privilege on any tables you want to add to a business area
- to install the tutorial, see the *Oracle9i Discoverer Administrator Tutorial*
- to take advantage of the following Discoverer features, you need specific privileges:
  - Automated Summary Management (for more information, see [Chapter 14, "What are the prerequisites for creating summary folders with ASM?"](#))
  - manual summary folder creation (for more information, see [Chapter 15, "What are the prerequisites for creating summary folders manually in Discoverer?"](#))

To use a Discoverer system, end users will require certain Discoverer and database privileges:

- access to at least one EUL
- access to at least one business area in the EUL
- the SELECT database privilege on the tables on which folders in a business area are based



- to take advantage of the following Discoverer features, users need specific privileges
  - scheduled workbooks (for more information, see [Chapter 8, "What are the prerequisites for scheduling workbooks?"](#))
  - user PL/SQL functions (for more information, see [Chapter 11, "What are custom PL/SQL functions?"](#))

## How to start Discoverer Administrator

To start Discoverer Administrator:

1. From the Windows Start menu, choose Programs | Oracle9i Developer Suite - HomeName | Discoverer Administrator to display the Connect to Oracle9i Discoverer Administrator dialog.

*Figure 2-1 Connect to Oracle9i Discoverer Administrator dialog*



2. Enter the username of the database user with which you want to start Discoverer Administrator in the **Username** field
3. Enter the password of the database user with which you want to start Discoverer in the **Password** field.
4. Specify the database to connect to in the **Connect** field, using the following guidelines:
  - if you are logging onto your default Oracle database, do not enter anything in the **Connect** field

- if you are logging onto a different Oracle database, specify the name of the database (if you not sure which name to use, contact your database administrator)
5. Click the Connect button to start Discoverer Administrator and connect to the database.

What you see next depends on your Discoverer system:

- if you have access to one or more EULs, you are prompted to create a new business area or open an existing business area in your default EUL (for more information, see [Chapter 4, "Creating and maintaining business areas"](#))
- if you do not have access to any EULs (e.g. if you are the first person to use Discoverer Administrator in your organization, or if you have not been given Administration privilege on any existing EULs), you are prompted to create a new EUL (for more information, see [Chapter 3, "How to create an End User Layer for an existing database user"](#))

### Notes

- The Connect to Oracle9i Discoverer Administrator dialog might contain the **Oracle Applications User** check box. Select this check box if you want to use Discoverer Administrator to manage an EUL for use with Oracle Applications. For more information about using Discoverer with Oracle Applications, see [Chapter 17, "Using Discoverer with Oracle Applications"](#).
- You always start Discoverer Administrator in your default EUL. Your default EUL is the one specified on the "[Options dialog: Default EUL tab](#)". If you want to change the EUL you are working in, you must change your default EUL and then reconnect to Discoverer Administrator.

## What is the Workarea?

The Workarea is your view into the End User Layer. The Workarea is where you maintain the EUL by creating and editing:

- business areas and folders
- items
- hierarchies
- item classes

- summary folders

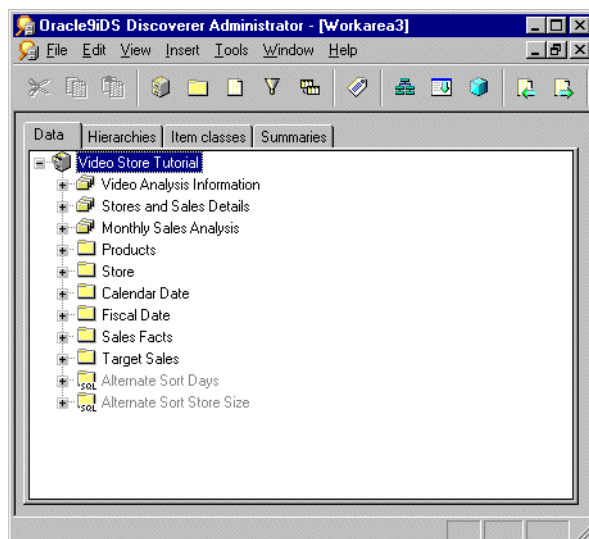
The Workarea window is displayed within the Discoverer Administrator main window. You can open more than one Workarea window at a time, which is useful when you want to copy objects between business areas. Note however that all Workarea windows contain the same business areas.

## About the tabs in the Workarea window

The Workarea window contains four tabs:

- The Data tab displays the structure and content of each business area. The Data tab enables you to:
  - create calculated items
  - create complex folders
  - create joins
  - create conditions
  - create new business areas, folders, and items
  - modify object properties

**Figure 2–2** Workarea window: Data tab

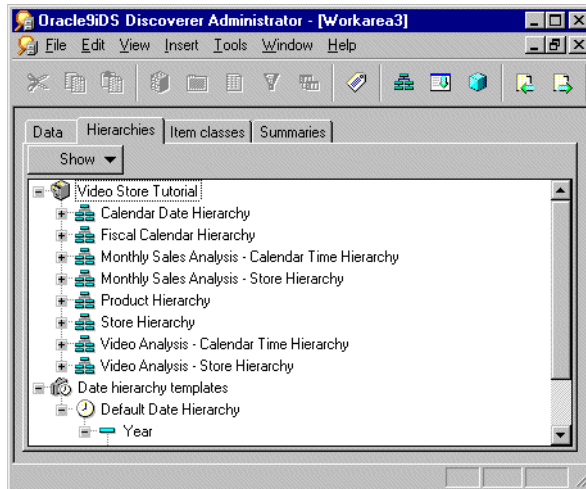


For more information about the Data tab and the icons displayed on it, see "[Workarea: Data tab](#)"

- The Hierarchies tab displays the hierarchies within each business area. The Hierarchies tab enables you to:
  - create new hierarchies
  - review the content and organization of existing hierarchies
  - view the hierarchy templates supplied with Discoverer Administrator

The Show button on the Hierarchies tab enables you to specify the hierarchies that are displayed.

**Figure 2–3 Workarea window: Hierarchies tab**



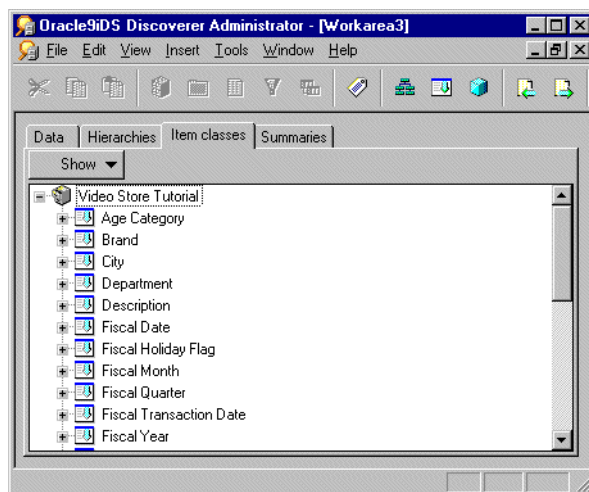
For more information about the Hierarchies tab and the icons displayed on it, see "[Workarea: Hierarchies tab](#)".

- The Item Classes tab displays the item classes within each business area. The Item Classes tab enables you to:
  - create new item classes
  - view the list of values associated with an item class (if there is one)
  - view items that use each item class

- identify the item classes that have drill to detail and alternative sort attributes, and whether those options are active

The Show button on the Item Classes tab enables you to specify the item classes that are displayed.

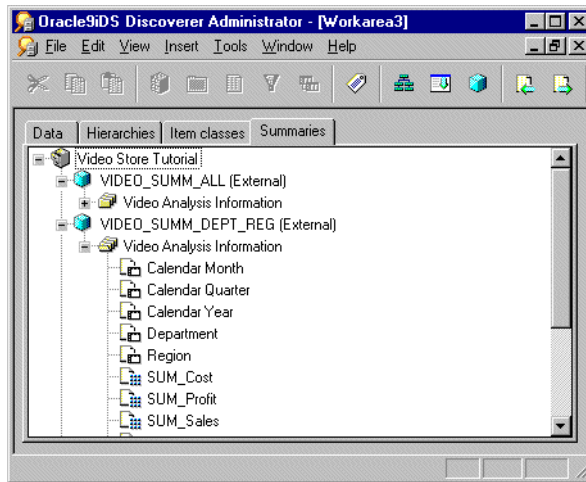
**Figure 2–4** Workarea window: Item Classes tab



For more information about the Item Classes tab and the icons displayed on it, see "[Workarea: Item Classes tab](#)".

- The Summaries tab displays the summary folders within each business area. The Summaries tab enables you to:
  - create new summary folders
  - review the organization and definition of summary folders
  - refresh summary folders

**Figure 2–5 Workarea window: Summaries tab**



For more information about the Summaries tab and the icons displayed on it, see "[Workarea: Summaries tab](#)".

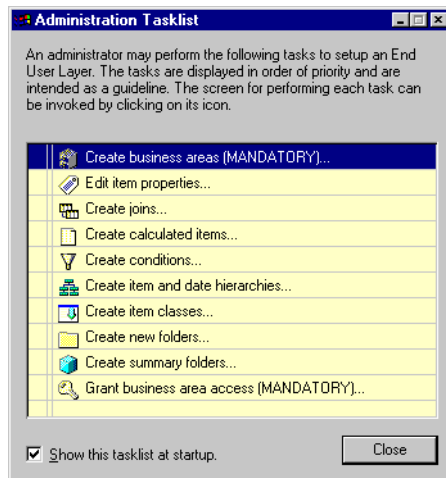
## About the context sensitive menus in the Workarea window

If you click the right-mouse button when working with Discoverer Administrator, a popup menu is displayed. In the Workarea window, the contents of this popup menu are the commands most frequently used with the currently selected object.

If no object is currently selected, the popup menu displays commands for working with a business area in general and commands appropriate to the current tab.

## About the Administration Tasklist

When you first start Discoverer Administrator, the Administration Tasklist is displayed on top of the main Discoverer Administrator window.

**Figure 2–6 Administration Tasklist**

Use the Administration Tasklist in two ways:

- as a reminder of the basic steps involved in preparing a business area
- as a shortcut method of displaying the dialogs associated with the listed tasks

## About Discoverer Administrator documentation and online help

Discoverer Administrator is supplied with online Help and documentation.

The Discoverer Administrator Help System gives you context sensitive access to reference information from the Administration Guide in HTML format.

To start the Help System either click Help in a Discoverer dialog or choose Help | Help Topics.

- the Help button on Discoverer Administrator dialogs displays detailed context sensitive help on the fields in the dialog
- the Help | Help topics menu option displays the contents of the Oracle9i Discoverer Administrator help system, including the context sensitive dialog help
- the Help | Manuals menu option displays a list of available Discoverer manuals

To find a topic in the Help System:

- click the Contents icon at the top of each help page or choose Help | Help Topics (to see a list of the topics in the help system)

- click the **Index** icon at the top of every help page to see a list of index entries

To view (and print) the Administration Guide in PDF format, use the Oracle9iDS documentation CD.

**Hint:** To search for words or phrases, use the Administration Guide in PDF format.

Additional Discoverer documentation is available on the Oracle9iAS Documentation CD.



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# Creating and maintaining End User Layers

## Creating and maintaining End User Layers

This chapter explains how you create and maintain End User Layers using Discoverer Administrator, and contains the following topics:

- "What is an End User Layer?"
- "What are End User Layer owners?"
- "What privileges do you need to create an End User Layer in an Oracle database?"
- "What privileges do you need to create an End User Layer in a non-Oracle database?"
- "What privileges do you need to maintain an End User Layer?"
- "What is the EUL Gateway?"
- "How to create an End User Layer for an existing database user"
- "How to create an End User Layer in a new database user"
- "How to delete an End User Layer"
- "How to view or change the default End User Layer"
- "About copying EULs and EUL objects by exporting and importing"
- "Which export/import method do you use?"
- "How to export the entire EUL using the Export Wizard"
- "How to export selected business areas using the Export Wizard"
- "How to export selected EUL objects using the Export Wizard"

- ["How to export End User Layer objects \(to import to another database\) using the Discoverer command line interface"](#)
- ["How to import End User Layer objects to a database \(after export from another database\) using the Discoverer command line interface"](#)
- ["How to export an EUL using the standard database export utility"](#)
- ["How to import an EUL using the standard database import utility"](#)
- ["How to import EUL objects from a file using the Import Wizard"](#)
- ["Notes about EUL creation and maintenance"](#)

## What is an End User Layer?

The End User Layer (EUL) is the metadata (i.e. data about the actual data in a database) that is simple and easy for Discoverer end users to understand. You use Discoverer Administrator to create, customize, and maintain this view for your users so they can easily access data in Discoverer. You must have access to at least one EUL in order to use Discoverer. Access is granted using the Privileges dialog, described in [Chapter 7, "Controlling access to information"](#).

## Why is the End User Layer useful?

The EUL insulates Discoverer end users from the complexity usually associated with databases. It provides an intuitive, business-focused view of the database using terms that Discoverer end users are familiar with and can easily understand. This enables Discoverer end users to focus on business issues instead of data access issues.

- What does the EUL contain?

The EUL contains the metadata that defines one or more business areas. A business area is a conceptual grouping of tables and/or views that apply to a user's specific data requirements. Business areas can be set up to reflect the needs of the user or group of users accessing the EUL.

For example, an accounting department might have an accounting business area that represents data about budgets and finance, while project leaders in an engineering department might have a business area specifically for projects requiring budget information. Although some of the columns may be the same, the exact combination of tables and views for each department may be different.

- Discoverer creates the EUL tables

The EUL Manager dialog enables you to create or delete, the set of tables that make up an EUL.

When a Discoverer manager defines folders and items in a business area using Discoverer Administrator, Discoverer generates the appropriate SQL statements (that define the selections from a table, view, or column) and stores them in the EUL tables. When a Discoverer end user executes a query (in Discoverer Plus or Discoverer Viewer), Discoverer generates the corresponding SQL statement and sends it to the database, which in turn returns the results to display in Discoverer. The Discoverer end user does not have to understand any SQL to access, analyze, and retrieve data. It is all handled by Discoverer.

- Discoverer exports/imports EUL objects

You can export EUL objects (e.g. business areas, workbooks, folders, items) from one database and import them into another database. For example, you might want to move EUL objects when transitioning from a development environment to a production environment.

You can import and export EULs and EUL objects in the following ways:

- using the Export or Import menu options (for more information, see [Chapter 4, "Creating and maintaining business areas"](#))
- using the Discoverer command line interface (for more information, see )

**Note:** The EUL preserves the database's data integrity. Nothing that you or the Discoverer end user does with Discoverer affects the application data in the database; Discoverer only affects the metadata held in the EUL. There are however, certain PL/SQL functions that can affect the data in the database (for more information, see your database administrator).

## What are End User Layer owners?

An End User Layer owner is the database user that an EUL is created for.

A database user can only own one EUL. If you are connected to your own EUL and you attempt to create a new one, Discoverer Administrator prompts you to delete your existing EUL. If you create a EUL for a database user that already owns an EUL, Discoverer Administrator prompts you to delete the existing EUL before creating the new one.

The EUL owner maintains and modifies their own EUL and can grant access to the EUL to other users. Depending on the privileges given to the other users, those users can use and make changes to the EUL.

When you create an EUL, you specify who has access to it, as follows:

- every user in the database (PUBLIC access)
- only the EUL owner (PRIVATE access)

To change access to an existing EUL, you must be logged in as the owner of the EUL or as a user who has the following Discoverer task privileges:

- Administrator
- Set Privileges

For more information, see [Chapter 7, "Controlling access to information"](#).

## What privileges do you need to create an End User Layer in an Oracle database?

To create an End User Layer in an Oracle database, the database user that the EUL is being created in must have the following database privileges:

- CREATE SESSION
- CREATE TABLE
- CREATE VIEW
- CREATE SEQUENCE
- CREATE PROCEDURE

The database user must also have the following specified:

- a default tablespace (this must not be a temporary tablespace)
- a quota set in the default tablespace (recommended minimum is 3MB)

For more information about the default tablespace, see "[Create EUL Wizard: Step 2 dialog](#)".

If you are running Discoverer against an Oracle 8.1.6 and later database, the database user requires further privileges to make use of Discoverer's manual summary management and Automated Summary Management (ASM) functionality. For more information, see:

- [Chapter 14, "What are the prerequisites for creating summary folders with ASM?"](#)

- [Chapter 15, "What are the prerequisites for creating summary folders manually in Discoverer?"](#)

The EUL Manager dialog enables you to:

- create an EUL for an existing Oracle database user, provided that database user meets the above conditions
- create an EUL for a new Oracle database user, provided you (the user creating the new user) have the following database privileges:
  - CREATE USER
  - GRANT ANY PRIVILEGE

If you create an EUL for a new Oracle database user, Discoverer grants the necessary privileges and sets the default tablespace and quota.

## What privileges do you need to create an End User Layer in a non-Oracle database?

To create an End User Layer for a non-Oracle database user, the database user must have the following database privileges:

- CREATE SESSION (use your database's equivalent for this Oracle term)
- CREATE TABLE
- CREATE VIEW

Discoverer Administrator does not enable you to create new users for non-Oracle databases.

## What privileges do you need to maintain an End User Layer?

You can maintain EULs in Discoverer Administrator if your database user has the Administration privilege.

To apply the Administration privilege to a database user, see [Chapter 7, "How to specify a user or role \(responsibility\) to perform a specific task"](#).

## What is the EUL Gateway?

The EUL Gateway provides a way for Discoverer to populate an EUL with meta-data from another source, such as Oracle Designer. The EUL Gateway allows meta-data defined in another tool or application to be loaded directly into the EUL.

To set up an EUL Gateway see the document `eulgatw.doc` located in the `<ORACLE_HOME>\discv902\kits` directory.

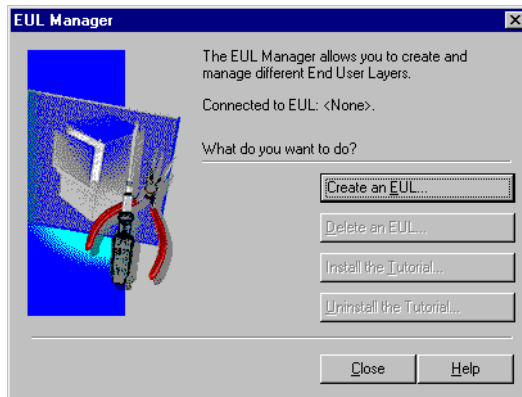
For information about loading a business area from the EUL Gateway see [Chapter 4, "How to create a business area using the Load Wizard"](#).

## How to create an End User Layer for an existing database user

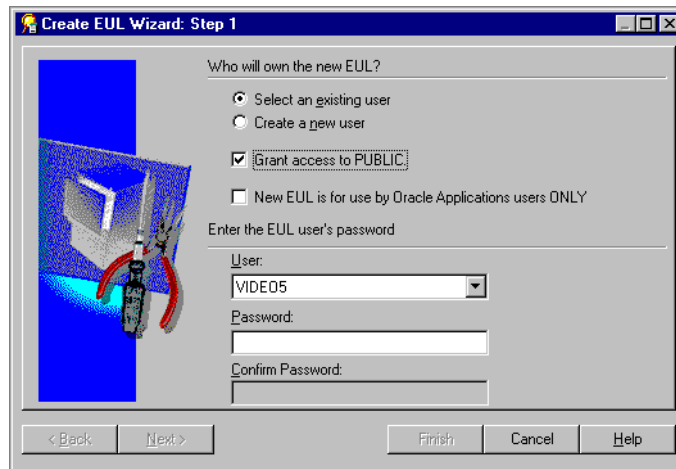
To create an EUL for an existing database user:

1. Choose Tools | EUL Manager to display the ["EUL Manager dialog"](#).

*Figure 3–1 EUL Manager dialog*



2. Click Create an EUL to display the ["Create EUL Wizard dialog"](#).

**Figure 3–2 Create EUL Wizard Step 1**

3. Select the **Select an existing user** radio button.
4. Select or clear the **Grant access to PUBLIC** check box as required:
  - select this check box to enable all users in the current database to access the new EUL
  - clear this check box to enable only the EUL owner to view data through the new EUL
5. Select or clear the **New EUL is for use by Oracle Applications users ONLY** check box as required:
  - select this check box to restrict the new EUL to Oracle Applications users only (for more information about Applications Mode EULs, see [Chapter 17, "Using Discoverer with Oracle Applications"](#))
  - clear this check box to create a standard EUL
6. Select the database user that you want to own the new EUL from the **User** drop down list.
7. If you specified a database user other than the current user to be the EUL owner, you need to specify the database user's password.
8. Click **Finish**.

Discoverer Administrator displays the Commit Status progress bar and creates a new EUL for the specified database user.

When the new EUL has been created, Discoverer gives you the option to install the Discoverer tutorial in the new EUL. For more information, see the *Oracle9i Discoverer Administrator Tutorial*.

## How to create an End User Layer in a new database user

**Note:** This feature is not available with non-Oracle databases. If you are using a non-Oracle database, ask your database administrator to create the necessary user IDs on the database.

For more information about the privileges required to create an EUL in a new database user, see ["What privileges do you need to create an End User Layer in an Oracle database?"](#).

To create an EUL in a new database user:

1. Choose Tools | EUL Manager to display the ["EUL Manager dialog"](#).
2. Click Create an EUL to display the ["Create EUL Wizard dialog"](#).
3. Select the **Create a new user** radio button.

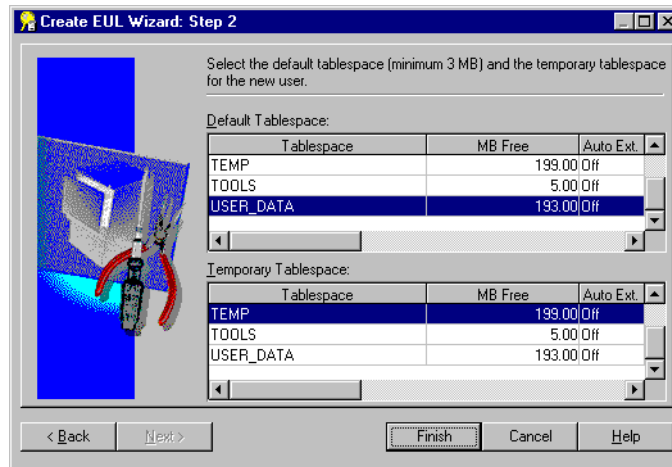
If the **Create a new user** radio button is unavailable, contact your database administrator to grant the CREATE USER privilege.

4. Select or clear the **Grant access to PUBLIC** check box as follows:
  - select this check box to enable all users in the current database to access the new EUL
  - clear this check box to enable only the EUL owner to view data through the new EUL
5. Select or clear the **New EUL is for use by Oracle Applications users ONLY** check box as follows:
  - select the check box to restrict the new EUL to Oracle Applications users only (for more information about Applications Mode EULs, see [Chapter 17, "What are Oracle Applications?"](#))
  - clear the check box to create a standard EUL
6. Specify a name for the new database user in the **User** field.
7. Specify a password for the new database user in the **Password** field.



8. Specify the new database user's password again in the **Confirm Password** field.
9. Click Next to display the "Create EUL Wizard: Step 2 dialog".

**Figure 3–3 Create EUL Wizard Step 2**



10. Specify the default and temporary tablespaces for the new database user.

If you are unsure which to choose, see your database administrator. For more information, see the "Create EUL Wizard: Step 2 dialog".

11. Click Finish.

Discoverer Administrator displays the Commit Status progress bar and creates a new database user and new EUL in that database user.

When the new database user and EUL have been created, Discoverer gives you the option to install the Discoverer tutorial in the new EUL. For more information, see the *Oracle9i Discoverer Administrator Tutorial*.

## How to delete an End User Layer

You might want to delete an EUL for a number of reasons. For example, it might be an old or a test EUL.

**Note:** You must connect as the owner of the EUL that you want to delete.

To delete an EUL:

1. Choose File | Connect to display the "Connect dialog".
2. Specify the username, password, and connect string for the owner of the EUL that you want to delete, and click Connect to display the "Load Wizard: Step 1 dialog".
3. Click Cancel to close the Load Wizard.
4. Choose Tools | EUL Manager.
5. Click Delete an EUL to display the "Delete EUL dialog".  
Discoverer prompts you to confirm that you want to delete the current EUL.
6. Make sure that the EUL specified in the EUL field is the one you want to delete and click OK.  
  
If the EUL name displayed is incorrect, go back to Step 2 and use the correct connect string to connect as the EUL owner.  
  
When you click OK, Discoverer prompts you to confirm that you want to delete all EUL tables, all EUL information and workbooks in the database and all summary data and information.
7. Click Yes to continue.
8. Click OK to delete the EUL.  
  
Discoverer deletes the EUL objects for the current database user.

## How to view or change the default End User Layer

You can view or change which EUL is the default EUL for the current database user (i.e. the EUL used when the current database user connects to Discoverer Administrator).

**Note:** You can only select an alternative EUL if the database user has access to more than one EUL.

To view or change the default EUL:

1. Choose Tools | Options | Default EUL tab to display the "Options dialog: Default EUL tab".
2. (optional) Click the EUL that you want to use next time you connect as the current database user and click OK.

## About copying EULs and EUL objects by exporting and importing

Typically, you will want to:

- backup or archive EULs
- distribute EULs to other locations
- copy business areas between EULs (for more information, see [Chapter 4, "How to copy business areas between EULs"](#))
- copy EUL objects (e.g. business areas, folders, hierarchies, calculations) from one EUL to another
- apply patches to a production environment

There are a number of different ways to copy EULs and EUL objects, depending on whether you want to:

- copy specified EUL objects into another EUL
- copy an entire EUL and recreate it as a new EUL
- copy the database user that is the EUL owner

In all these cases, you perform an export operation followed by an import operation. For more information, see "[Which export/import method do you use?](#)".

If you use Discoverer Administrator to export EULs or EUL objects, you will create a Discoverer EUL export file (with an .EEX suffix). Having created an .EEX file, you can then use Discoverer Administrator to import the .EEX file.

Note that you can import .EEX files:

- that have been exported from Discoverer Release 3.1 and earlier
- that have been exported from Discoverer Release 4.1 and later (these EUL export files are in XML format, although they have an .EEX extension)

## Which export/import method do you use?

To copy EUL objects between EULs you first export the EUL objects to a file, then import them into a new EUL or new database.

You copy EUL objects between EULs using

- the Discoverer Export Wizard and Import Wizard (for more information, see "[About using the Discoverer Export Wizard and Import Wizard](#)")

- the Discoverer command line interface (for more information, see ["About using the Discoverer command line interface to export/import EUL objects"](#))
- the standard database export/import commands (for more information, see ["About using the standard database export/import commands to export/import EUL owners"](#))

## About using the Discoverer Export Wizard and Import Wizard

You use the Discoverer Export Wizard to export EUL objects to an EUL export file (with a suffix .EEX). Having exported the objects, you can then import the .EEX file using the Discoverer Import Wizard.

The EUL objects that you export (to an .EEX file) include business areas, folders, item hierarchies, date hierarchies, item classes, workbook definitions (created in Discoverer Desktop and Discoverer Plus), PL/SQL function registration information, summary folders, and the automated summary management (ASM) policy.

Refer to the following topics to find out how to export or import EUL objects using the Discoverer user interface:

- ["How to export the entire EUL using the Export Wizard"](#)
- ["How to export selected business areas using the Export Wizard"](#)
- ["How to export selected EUL objects using the Export Wizard"](#)
- ["How to import EUL objects from a file using the Import Wizard"](#)

### Notes

The Export Wizard does not export the database, EUL tables, or database objects referenced by the EUL. To export these objects, you must follow the steps in ["How to export an EUL using the standard database export utility"](#).

## About using the Discoverer command line interface to export/import EUL objects

You use the Discoverer command line interface to export/import EUL objects without using the Discoverer user interface. For more information about the Discoverer command line interface, see [Chapter 21, "What is the Discoverer command line interface?"](#).

Refer to the following topics to find out how to export and import EUL objects using the Discoverer command line interface:

- ["How to export End User Layer objects \(to import to another database\) using the Discoverer command line interface"](#)
- ["How to import End User Layer objects to a database \(after export from another database\) using the Discoverer command line interface"](#)

**Note:** The Discoverer command line interface export facility does not export the database, EUL tables, or database objects referenced by the EUL definitions. To export these objects, you must follow the steps in ["How to import an EUL using the standard database import utility"](#).

## About using the standard database export/import commands to export/import EUL owners

You use standard database export/import commands to export/import the database, EUL tables, and database objects referenced by the EUL definitions.

Use the following tasks to export/import EUL objects between databases:

- ["How to export an EUL using the standard database export utility"](#)
- ["How to import an EUL using the standard database import utility"](#)

How you export or import an EUL depends on:

- the version of the Oracle client software installed on your machine
- the version of the Oracle database on which the EUL resides

We recommend that the version of the Oracle database and the version of the Oracle database client software installed on your machine are the same. If the versions are not the same (e.g. if the EUL is on an Oracle8*i* database and Oracle9*i* client software is installed on your machine), you might not be able to follow the instructions below. If you are unable to export the EUL, contact your database administrator and ask them to export the EUL for you.

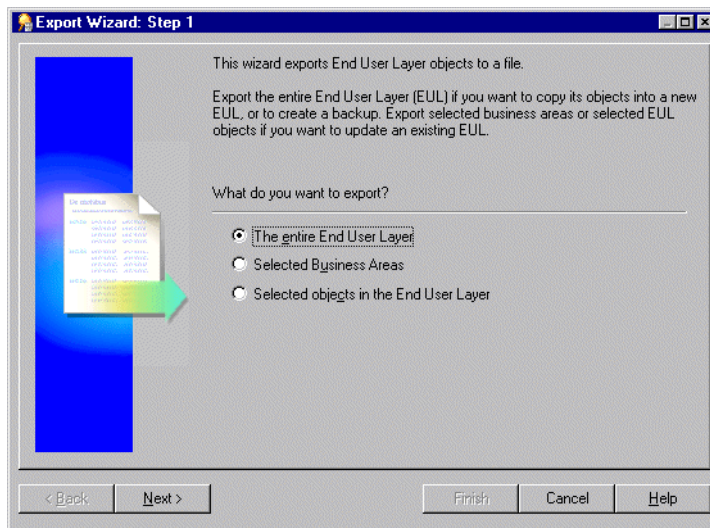
## How to export the entire EUL using the Export Wizard

Use this option to export an entire EUL to a file when you want to copy objects from the EUL into a new EUL or to create a backup.

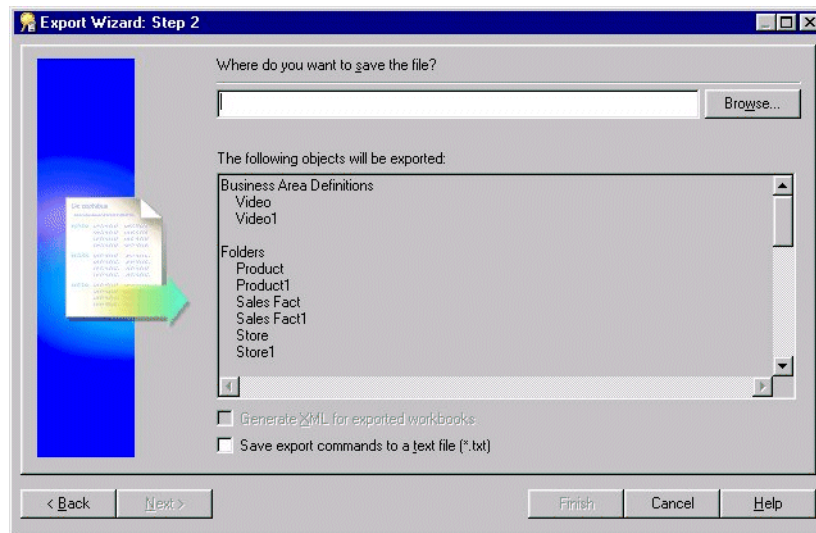
To export the entire EUL using the Export Wizard:

1. Choose File | Export to display the ["Export Wizard Step 1 dialog"](#).

**Figure 3–4** *Export Wizard: Step 1 dialog*



2. Select the **The entire End User Layer** radio button and click Next to display the "Export Wizard: Step 2 dialog".

**Figure 3–5** *Export Wizard: Step 2 dialog*

You use the above dialog to specify a name and location for the export file.

3. Click **Browse** to display the **Save As** dialog.

This enables you to browse for a location to save the EUL export file.

4. Enter a suitable name for the exported EUL.

5. (optional) Select the **Export selected workbooks as XML** check box to save any workbook definitions in XML format.

This enables you to view workbook definitions in an XML browser.

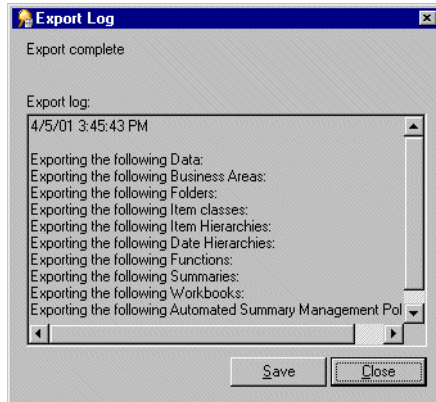
**Note:** The export file (\*.eex) is always in XML format but workbooks by default are saved inside it as a binary to save space and time. Select this check box to save the workbook definitions additionally as XML inside the export file.

6. (optional) Select the **Save export commands to a text file (\*.txt)** check box to save the export commands that created this export to a text file.

This creates an additional file containing the commands used to create this export and applies the file extension \*.txt. This file can then be used in conjunction with the command line interface (for further information about the command line interface, see [Chapter 21, "Discoverer command line interface"](#)).

7. Click Finish to create the export file (and any additional files selected) in the specified location and display the Export Log.

**Figure 3–6** Export Log dialog



The Export Log displays information about what has been exported.

8. (optional) Click Save to specify a name and location to save the Log file.
9. Click Close to finish.

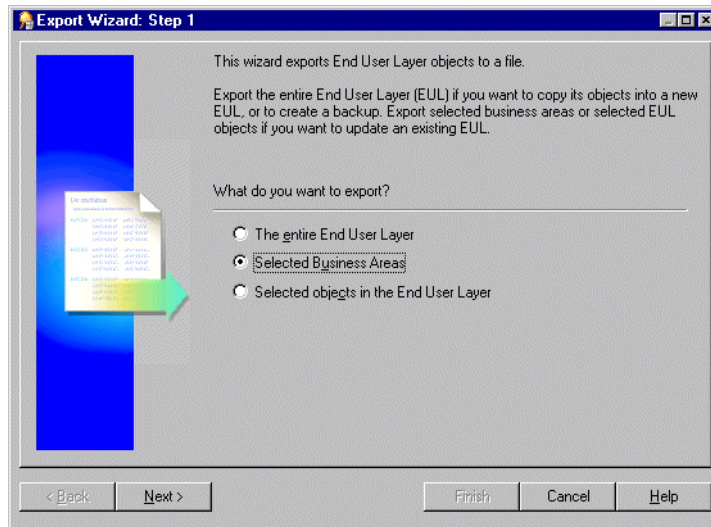
## How to export selected business areas using the Export Wizard

Use this option when you want to use the export file to update an existing EUL with selected business areas.

To export the selected business areas using the Export Wizard:

1. Choose File | Export to display the ["Export Wizard Step 1 dialog"](#).



**Figure 3–7 Export Wizard Step 1 dialog**

2. Select the **Selected business areas** radio button and click Next to display the "Export Wizard: Step 2 dialog".
3. Move the business areas that you want to export from the Available list to the Selected list.

You can select more than one business area at a time by holding down the Ctrl key and clicking another business area.

4. Click Next to display the "Export Wizard: Step 3 dialog".
5. Click Browse to display the Save As dialog.

This enables you to browse for a location to save the business area export file.

6. Enter a suitable name for the exported business area.
7. (optional) Select the **Save export commands as a text file (\*.txt)** check box to save the export commands that created this export to a text file.

This creates an additional text file containing the commands used to create this export and applies the file extension .txt. This file can then be used in conjunction with the command line interface (for further information about the command line interface, see [Chapter 21, "Discoverer command line interface"](#)).

8. Click Finish to create the export file (and any additional files selected) in the specified location and display the Export Log.

**Figure 3–8** Export Log dialog



The Export Log displays information about what has been exported.

9. (optional) Click Save to specify a name and location to save the Log file.
10. Click Close to finish.

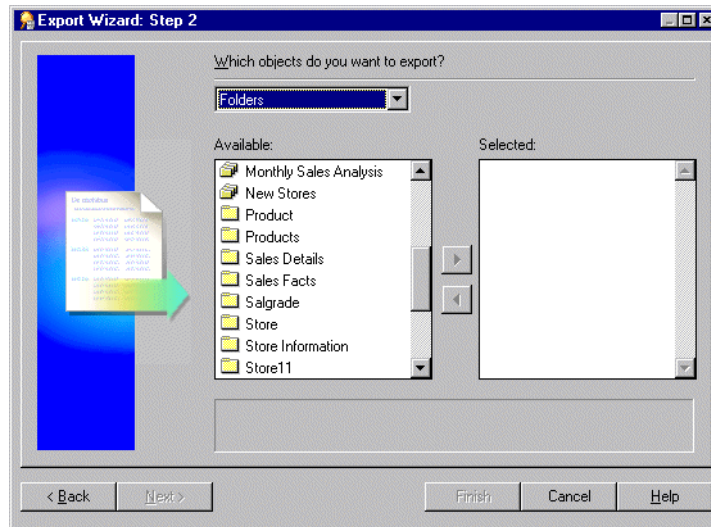
**Note:** If you are copying business areas between EULs, continue with step 2 of the following task, see [Chapter 4, "How to copy business areas between EULs"](#).

## How to export selected EUL objects using the Export Wizard

Use this option when you want to use the export file to update an existing EUL with selected EUL objects. For example, when applying a minor change to a production business area.

To export the selected objects using the Export Wizard:

1. Choose File | Export to display the ["Export Wizard Step 1 dialog"](#).
2. Select the **Selected Objects in the End User Layer** option and click Next to display the ["Export Wizard: Step 2 dialog"](#).

**Figure 3–9 Export Wizard: Step 2 dialog**

3. Use the **Which objects do you want to export?** drop down list to display the objects (EUL objects) that you want to export to a file.

For example, folders, item classes and item hierarchies.

**Note:** If you select a business area above, Discoverer exports just the definition of the business area and not its folders and items. To export business area folders and items you need to select them explicitly.

4. Move the object that you want to export from the **Available** list to the **Selected** list.  
You can select more than one object at a time by holding down the Ctrl key and clicking another object.
5. Click Next to display the "Export Wizard: Step 3 dialog".
6. Click Browse to display the Save As dialog.  
This enables you to browse for a location to save the export file.
7. Enter a suitable name for the exported objects.
8. (optional) Select the **Export selected workbooks as XML** check box to save any workbooks in XML format.

**Note:** The export file (\*.eex) is always in XML format but workbooks by default are saved inside it as a binary to save space and time. Select this check box to save the workbook definitions additionally as XML inside the export file.

9. (optional) Select the **Save export commands as a text file (\*.txt)** check box to save the export commands that created this export to a text file.

This creates an additional text file containing the commands used to create this export and applies the extension .txt. This file can then be used in conjunction with the command line interface (for further information about the command line interface, see [Chapter 21, "Discoverer command line interface"](#)).

10. Click Finish to create the export file (and any additional files selected) in the specified location and display the Export Log.

**Figure 3–10** Export Log dialog



The Export Log displays information about what has been exported.

11. (optional) Click Save to specify a name and location to save the Log file.
12. Click Close to finish.

## How to export End User Layer objects (to import to another database) using the Discoverer command line interface

You can copy EUL objects from one database to another by exporting them to a Discoverer export file (.EEX) and then importing the .EEX file to another database

using the command line interface. This is the first of two tasks that enable you to copy EUL objects from one database to another. You must complete this export task before you can import the EUL objects into another database.

To export EUL objects from a database using the Discoverer command line interface:

1. Use the Discoverer command line interface `/export` option to export the required EUL objects to a Discoverer export file (.EEX).

For example, to export the Video Store Tutorial business area and two workbooks ("Vistr4 - Video Tutorial Workbook" and "Vidaf4 - Analytic Function Examples") to the Vidstr.eex file, you might type the following:

```
D:\orant\Discv902\Dis5adm.exe /connect eulowner/eulowner@orcl.world /export "D:\Vidstr.eex" "Video Store Tutorial" /workbook "Vistr4 - Video Tutorial Workbook" /workbook "Vidaf4 - Analytic Function Examples"
```

For more information about exporting EUL objects using the Discoverer command line interface, see [Chapter 21, "/export \(EUL objects\)"](#).

## Notes

To copy the EUL objects to another database, see ["How to import End User Layer objects to a database \(after export from another database\) using the Discoverer command line interface"](#).

## How to import End User Layer objects to a database (after export from another database) using the Discoverer command line interface

You can import EUL objects into a new database. Before you can complete this task you must export the EUL objects to a Discoverer export file (.EEX) (for more information, see ["How to export End User Layer objects \(to import to another database\) using the Discoverer command line interface"](#)). This is the second of two tasks enabling you to copy EUL objects from one database to another.

To import End User Layer objects into a database using the Discoverer command line interface:

1. Use the Discoverer command line interface `/import` option to import the EUL objects into the new EUL owner on the new database.

For example, to import the Vidstr.eex file, created above you might type the following:

```
D:\orant\Discv902\Dis5adm.exe /connect eulowner/eulowner@orcl.world /import
"D:\Vidstr.eex"
```

For more information about importing EUL objects using the Discoverer command line interface, see [Chapter 21, "/import \(EUL objects\)"](#).

## How to export an EUL using the standard database export utility

This moves all business areas, EUL tables and saved workbooks to a .dmp file.

To export an EUL using the standard database export utility (assuming the EUL resides on an Oracle9i database and you are using a machine on which you have installed Oracle9iDS):

1. Display a command line window (e.g. by choosing Command Prompt from the Windows Start menu).
2. Navigate to the <ORACLE\_HOME>\discv902 directory.

For example, if the <ORACLE\_HOME> directory is D:\ORACLE9i and the MS-DOS window currently displays C: , you would:

- type D: and press [Return]
- type cd \ORACLE9i\discv902 and press [Return]

3. Type the following command:

```
exp <eulowner>/<password>@<dbname> file=<filename.dmp> owner=<eulowner>
```

For example, to export an EUL owned by a database user hrmgr to a file hreul.dmp, you would type the following:

```
exp hrmgr/hrpswr@HRDB file=hreul.dmp owner=hrmgr
```

The EUL tables (and associated synonyms, views, and other definitions) are exported to the specified .dmp file in the <ORACLE\_HOME>\discv902 directory.

When the export is complete, the following message is displayed:

```
Export terminated successfully without warnings.
```

4. Close the command line window.

Having backed up the EUL, you are now ready to import it into a new database user.

## How to import an EUL using the standard database import utility

This imports the EUL business areas, EUL tables and saved workbooks from a database dump file (.DMP) into a new EUL owner on the new database.

**Note:** It is recommended that this database user owns no other tables.

To import an EUL using the standard database import utility (assuming the EUL resides on an Oracle9i database and you are using a machine on which you have installed Oracle9iDS):

1. Display a command line window (e.g. by choosing Command Prompt from the Windows Start menu).
2. Navigate to the <ORACLE\_HOME>\discv902 directory.

For example, if the <ORACLE\_HOME> directory is D:\ORACLE9i and the MS-DOS window currently displays C: , you would:

- type D: and press [Return]
- type cd \ORACLE9i\discv902 and press [Return]

3. Type the following command:

```
imp <eulowner>/<password>@<dbname> file=<filename.dmp> fromuser=<old_eul_owner>  
touser=<new_eul_owner>
```

For example, to import an EUL owned by a database user hrmgr from a file hreul.dmp into a new user hrmgr2, you would type the following:

```
imp hrmgr2/hrpswr@HRDB file=hreul.dmp fromuser=hrmgr touser=hrmgr2
```

The EUL tables (and associated synonyms, views, and other definitions) are imported to the specified .dmp file in the <ORACLE\_HOME>\discv902 directory.

When the import is complete, the following message is displayed:

Import terminated successfully without warnings.

4. Close the command line window.

### Notes

- Information in the EUL identifies the owner of summary tables. When you export an EUL containing summary tables from one database user and import it into a different database user, the second database user will become the owner of the summary tables. Therefore, you will need to update the EUL summary table ownership information.
- To update summary table ownership information, run the eulsown.sql script located in the <ORACLE\_HOME>\discv902\sql directory. When you run the script, you will be prompted for the name of the previous summary table owner and the name of the new summary table owner.

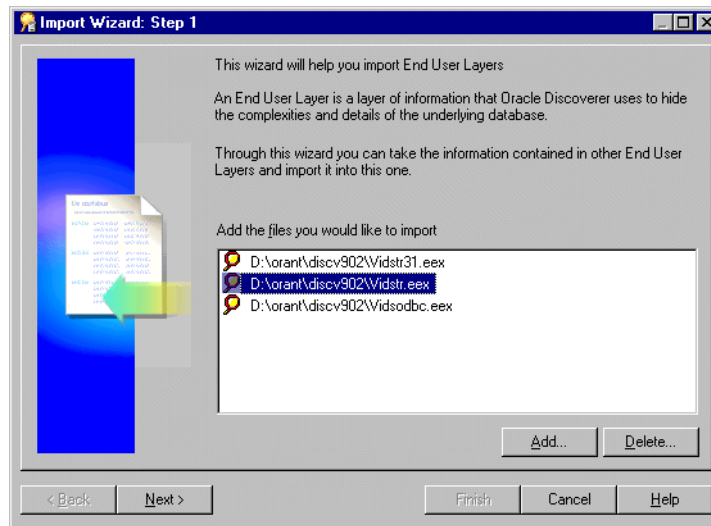
## How to import EUL objects from a file using the Import Wizard

You use the Import Wizard to import EUL objects (e.g. business areas, folders, hierarchies, calculations) from one EUL in order to re-use them in another EUL. You use an export file (.EEX) to update an existing EUL with selected EUL objects. For example, when applying a change to a production business area. For more information about exporting EUL objects, see "[About copying EULs and EUL objects by exporting and importing](#)".

To import EUL objects from a file using the Import Wizard:

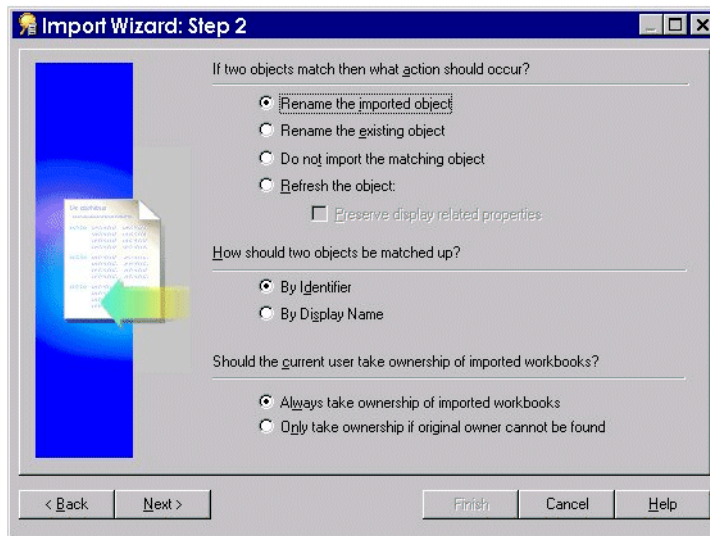
1. Choose File | Import to display the "[Import Wizard: Step 1 dialog](#)".



**Figure 3–11 Import Wizard: Step 1 dialog**

2. Click Add to display the Open dialog.
3. Locate and select one or more import files and click Open to return to the "Import Wizard: Step 1 dialog".  
Selected files appear in the Import File list.
4. Click Next to display the "Import Wizard: Step 2 dialog".

**Figure 3–12 Import Wizard: Step 2 dialog**

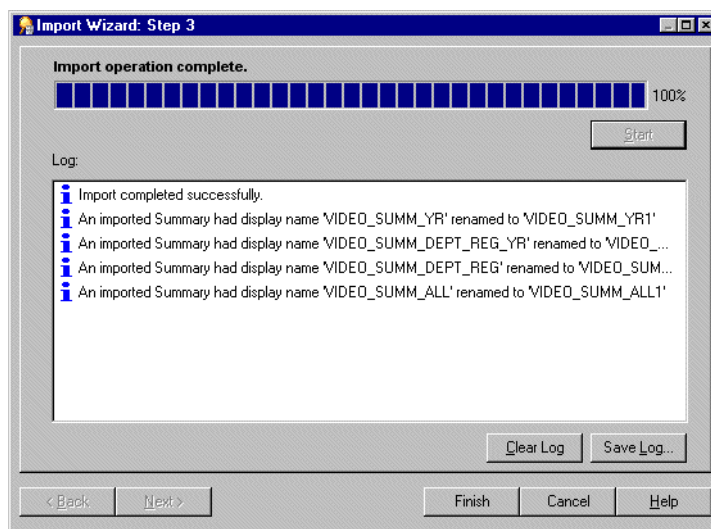


This dialog enables you to specify how Discoverer Administrator processes conceptually identical objects from another EUL. For more information about conceptually identical objects, see ["What are identifiers?"](#).

5. Specify what action should occur if two objects match.  
An object means any EUL object, for example, folder, item, calculated item.
6. Specify whether to preserve display related properties (only available if the **Refresh the object** radio button is selected).
7. Specify how you would like objects to be matched up.
8. Specify whether the current user should take ownership of imported workbooks.
9. Click Next to display the ["Import Wizard: Step 3 dialog"](#).

This dialog enables you to start the import and monitor its status as each EUL object is processed.

10. Click Start to begin the import.

**Figure 3–13 Import Wizard: Step 3 dialog**

11. (optional) After a completed import, click Save log... to save the status information to a text file in a specified location.
12. (optional) Click Cancel to abort the import.  
This option might be necessary if there are warning messages in the Import Log.
13. Click Finish to close the "Import Wizard: Step 3 dialog".

## Notes

- If you perform a complete import, the Data tab in the Workarea is updated to reflect the EUL objects imported, according to the match options that you have chosen.
- During the import of an EEX file where Discoverer Administrator cannot find joined folders a warning message is displayed in the Import Log dialog (for more information about exporting EUL objects and joins see [Chapter 21, "/export \(EUL objects\)"](#)).
- If you import EUL objects that include analytic functions, note that certain restrictions apply. For more information, see "[What are the EUL data migration scenarios with analytic functions?](#)".

## Notes about EUL creation and maintenance

### What are identifiers?

Identifiers are unique names that Discoverer Administrator uses to identify unique EUL objects (and Workbook objects in Discoverer Plus and Discoverer Viewer).

Discoverer Administrator uses identifiers to recognize when an object (imported from another EUL) refers to the same business object (known as a conceptually identical object) in the EUL you are importing into. This enables customized (or patched) EUL objects to be preserved. For example, a folder named Sales in EUL A may refer to the same folder named Sales Figures in EUL B. Both folders have the same identifier and can therefore be recognized as referring to the same EUL object.

Identifiers are visible in Discoverer Administrator but are hidden from Discoverer Plus users.

**Note:** To locate the identifier of a workbook/worksheet in Discoverer Plus, see the *Oracle9iAS Discoverer Plus User's Guide*.

### What are the space requirements and storage parameters for a typical EUL?

The minimum default tablespace of 3MB suggested in the "[Create EUL Wizard: Step 2 dialog](#)" is based upon storage parameters that the EUL specifies when creating database objects for the EUL. If you install the tutorial, the figure of 3MB will be exceeded.

A newly created EUL has the following space requirements:

- approximately 2.8MB without tutorial data
- approximately 3.8MB with tutorial data

The amount of space that is actually used will depend on other factors, including the block size specified for the tablespace in which the EUL is created.

As an approximate guide, adding a typical business area to an EUL will increase the size of the EUL by 1MB. The more complicated the business area (e.g. the more summary folders and complex items it contains), the more space the business area will require.

A default tablespace of 10-20MB will be adequate under normal conditions, but the amount of default tablespace required is determined by the amount of metadata that defines your EUL. Therefore, the default tablespace required could be larger, or smaller than the amount available in the tablespace that you select.

The database table storage parameters for EUL tables are as follows:

- EUL5\_DOCUMENTS and EUL5\_QPP\_STATS are created with the following storage parameters:

```
STORAGE (  
    INITIAL 40960  
    NEXT 1024000  
    PCTINCREASE 0  
)
```

- all other EUL tables are created with the following storage parameters:

```
STORAGE (  
    INITIAL 40960  
    NEXT 81920  
    PCTINCREASE 0  
)
```

The database index storage parameters for EUL indexes are as follows:

```
STORAGE (  
    INITIAL 4096  
    NEXT 8192  
    PCTINCREASE 0  
)
```

There are two factors that might cause the EUL to use up more space:

- block size

Discoverer specifies an initial extent of 4096 for indexes, but the server will always allocate a minimum of two blocks for any segment. Therefore, if the block size is greater than 2k the indexes will take up more space than Discoverer calculates.

- tablespace minimum extent setting

When a tablespace is created it is possible to specify the minimum extent for any extent created. This minimum size overrides the initial extent size if it is

greater and therefore causes the EUL objects to use up more space than Discoverer calculates.

## What are the EUL data migration scenarios with analytic functions?

When you migrate EUL data using Discoverer Administrator's import and export facilities, you need to be aware of the following restrictions that relate to analytic functions (for more information about analytic functions, see the *Oracle 9iAS Discoverer Plus User's Guide*):

- If you import a custom folder containing an analytic function into an EUL on an Oracle database earlier than version 8.1.6, the custom folder SQL is imported and stored in the EUL, but no items are created.
- Items or filters that contain analytic functions are not imported into an Oracle database earlier than version 8.1.6. These exceptions are reported in the Import Log (for more information, see ["How to import EUL objects from a file using the Import Wizard"](#)).
- Where complex folders contain analytic functions not supported by the database version, Discoverer filters out the analytic functions.
- If you downgrade a database from an Oracle 8.1.6 database to an earlier database version you can see analytic functions grayed out, but you cannot edit them (except to delete).

Note that there are also issues to be aware of when upgrading EULs that contain analytic functions from one Discoverer release to another (e.g. when upgrading from Discoverer Release 4.1 to Version 9.0.2). For more information, see [Chapter 24, "Notes about upgrading EULs that contain analytic functions"](#).

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# Creating and maintaining business areas

## Creating and maintaining business areas

This chapter explains how you create and maintain business areas using Discoverer Administrator, and contains the following topics:

- ["What are business areas?"](#)
- ["How to prepare to build a new business area"](#)
- ["What is the Load Wizard?"](#)
- ["How to create a business area using the Load Wizard"](#)
- ["How to open an existing business area when connecting to Discoverer Administrator"](#)
- ["How to open an existing business area when already connected to Discoverer Administrator"](#)
- ["How to copy business areas between EULs"](#)
- ["How to edit business area properties"](#)
- ["How to delete a business area"](#)
- ["How to synchronize a business area with the database"](#)
- ["Notes about business area creation and maintenance"](#)

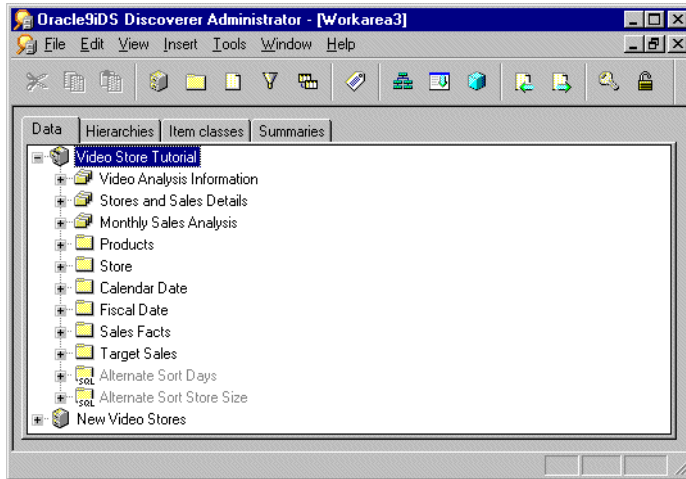
## What are business areas?

Business areas are conceptual groupings of tables and/or views designed to match Discoverer end users specific data requirements. For example, an accounting department needs a business area that represents data about budgets and finance.

Alternatively, managers in a human resources department need a business area specifically for departments and employee information.

Discoverer Administrator displays a business area as a file cabinet on the Data tab of the Workarea. You can open a business area to display its folders and items (for more information, see [Chapter 5, "What are folders?"](#) and [Chapter 9, "What are items?"](#)).

**Figure 4–1** *Workarea: Data tab displaying business areas, folders and items*





## How to prepare to build a new business area

You create a business area in Discoverer Administrator using the Load Wizard (for more information, see [Chapter 4, "What is the Load Wizard?"](#)). Before you start the Load Wizard, prepare by sketching out the business area design. Keep in mind what will be useful to the Discoverer end users whose purposes the business area will serve.

Use the following guidelines:

- Interview your users for a clear understanding of their requirements. Use the list of questions in [Chapter 2, "What are the prerequisites for using Oracle Discoverer?"](#) as a guideline for your user interviews.
- Identify the data source and have a clear understanding of its design.
- Identify which tables, views, and columns are required. Identify those that are likely to be included in multiple business areas. For example, the Employee folder might need to be in both the Sales and Human Resources business areas.
- Map out the necessary joins and determine whether they exist in the database or will have to be created by you using Discoverer Administrator. Joins might be predefined in the database with primary/foreign key constraints, or column names in different tables may match in ways that trigger sensible join conditions. For more information, see [Chapter 10, "What are joins?"](#).
- Identify security issues and access privileges. Include the user names the business area is to serve.

Keep in mind that your design is likely to change as you add the objects that will make the business area a useful and efficient analysis tool. The sketch provides a framework for you to modify and build upon.

## What is the Load Wizard?

The Load Wizard provides a user-friendly interface to create a business area and enables you to quickly:

- name and describe the business area
- load metadata into the business area
- and automatically:
  - format data
  - create joins from existing relationships between tables

**Note:** When doing a bulk load from an Oracle9i database, you can use also create joins from existing relationships between views (e.g. constraints on views).

- create summaries
- create date hierarchies against date items
- create default aggregates for datapoint items
- create lists of values for items
- sort folders and items

## How to create a business area using the Load Wizard

### **If you are already connected to Discoverer Administrator**

1. Choose Insert | Business Area | From Database...then follow step 2 below.

### **If you have just connected to Discoverer Administrator**

1. Click **Create a new business area** (conditional option, displayed only when connecting to Discoverer Administrator).

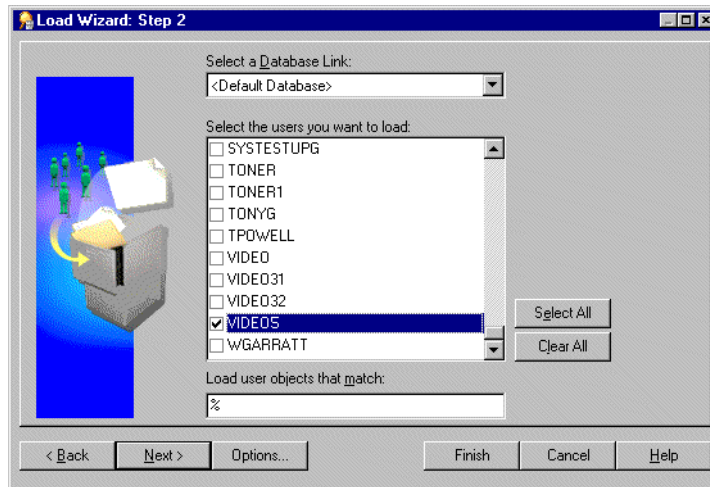
**Note:** The Load Wizard starts automatically when you connect to Discoverer Administrator and your username has access to an EUL.

2. Select one of the following options to specify where you want to load the meta-data from and click Next to display the "[Load Wizard: Step 2 dialog](#)":
  - On-line dictionary (for more information, see "[Loading from the online dictionary](#)")
  - Gateway (for more information, see "[Loading from a Gateway](#)")

For more information about the online dictionary and Gateway see the "[Load Wizard: Step 1 dialog](#)".

## Loading from the online dictionary

The "[Load Wizard: Step 2 dialog](#)" enables you to define the user objects to load into your new business area.

**Figure 4–2 Load Wizard: Step 2**

1. Select the database link from the **Select a Database Link** drop down list.

This displays the default database for the current user ID. The drop down list displays only the databases that the current user ID can connect to, based on any private or public database links that the user has access to.

2. Select a check box (for each database user) to load the data dictionary definitions of the database objects owned by each selected database user, into the business area.

The database users displayed are those that exist on the selected database.

3. (optional) Specify the pattern that a user's objects must match to be loaded into the business area in the field **Load user objects that match**.

The % symbol is displayed by default and is a wildcard that matches any character or string of characters. To reduce the number of schema objects that can be loaded from the database, use the wildcard in combination with other characters as follows:

To load schema objects	Enter what?
Find all schema objects	%
Find all schema objects beginning with D	D%

To load schema objects	Enter what?
Find all schema objects ending with AND	%AND
Find all objects beginning with A and having a five letter name (each underscore represents a letter).	A _ _ _ _ _

4. (optional) Click Options to specify the type of tables to be loaded (for further information, see the ["Online Dictionary Options dialog"](#)).

For example, whether public or private, or whether owned by or accessible to the users you select.

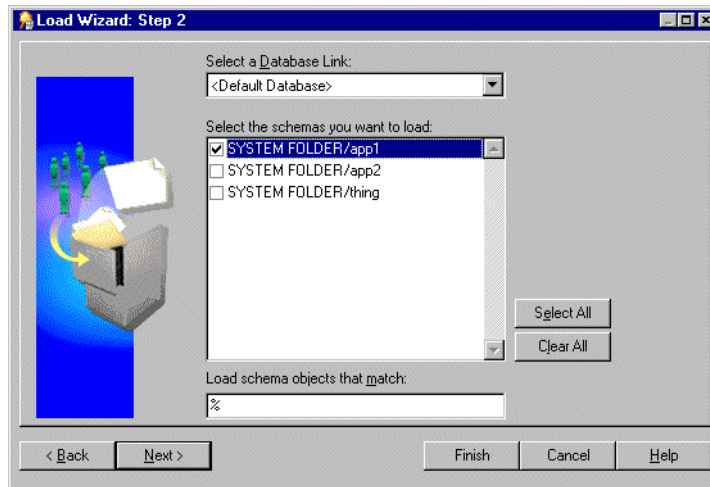
By default, the Load Wizard will load only:

- tables owned by the users specified
- private tables

5. Click Next and go to ["Selecting tables and views"](#).

## Loading from a Gateway

The ["Load Wizard: Step 2 dialog"](#) enables you to define the schema objects to load into your new business area.

**Figure 4–3 Load Wizard: Step 2**

1. Select the database link from the **Select a Database Link** drop down list.  
The **Select a Database Link** field displays the default database for the current user ID. The drop down list displays only the databases that the current user ID can connect to.
2. Select a check box for each schema that you want to load into the business area.  
The schemas displayed are those that exist on the selected database.
3. Specify the pattern that schema objects must match to be loaded into the business area (in the **Load schema objects that match** field) and click Next.  
The % symbol is displayed by default and is a wildcard that matches any character or string of characters. To reduce the number of schema objects that can be loaded from the database, use the wildcard in combination with other characters as follows:

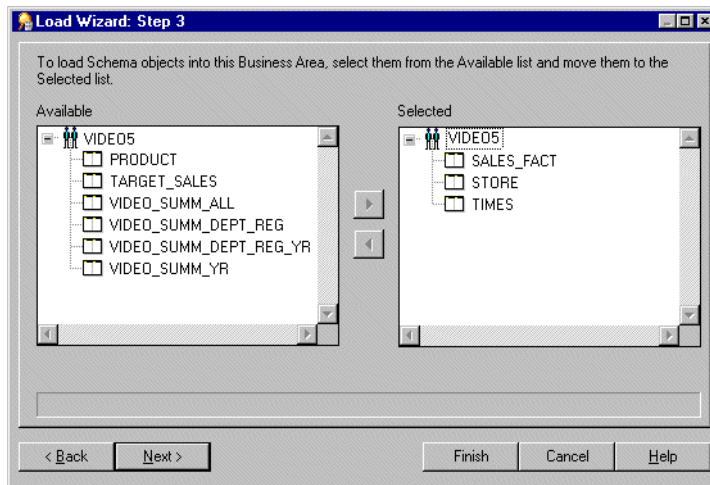
To load schema objects	Enter what?
Find all schema objects	%
Find all schema objects beginning with D	D%
Find all schema objects ending with AND	%AND

To load schema objects	Enter what?
Find all objects beginning with A and having a five letter name (each underscore represents a letter).	A _ _ _ _ _

## Selecting tables and views

The "Load Wizard: Step 3 dialog" enables you to select tables and views (schema objects) to load into the business area.

**Figure 4–4** Load Wizard: Step 3 dialog



The **Available** list displays a hierarchical list of users (via the on-line dictionary) or schemas (via the gateway) and the tables and views that are available to load into the business area. You can expand and collapse levels of the hierarchy by clicking the + and - signs.

To select tables or views to load into the business area:

1. Move the tables or views that you want to load into the business area, from the **Available** list to the **Selected** list.

You can select more than one table or view at a time by holding down the Ctrl key and clicking another table or view.

2. Click Next to display the "Load Wizard: Step 4 dialog" where you can specify how Discoverer Administrator creates joins and which additional objects Discoverer Administrator generates for the new business area.

Go to "Specifying what Discoverer Administrator generates for the business area".

## Specifying what Discoverer Administrator generates for the business area

The "Load Wizard: Step 4 dialog" enables you to decide what Discoverer Administrator generates for the business area, in terms of joins, summary folders, date hierarchies, default aggregates on datapoints and lists of values.

**Figure 4–5** Load Wizard: Step 4 dialog



To specify what Discoverer Administrator generates for the business area:

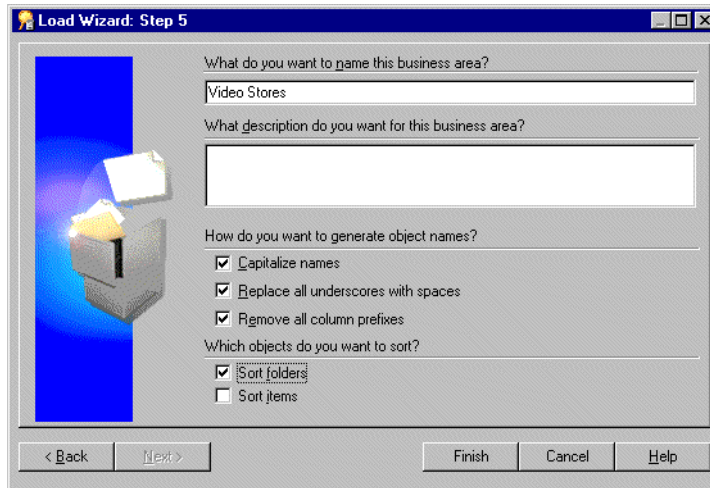
1. Select whether you want Discoverer Administrator to create joins and if so select an appropriate join option.
2. Select the additional objects you want to generate (for reference information about this dialog, see the "Load Wizard: Step 4 dialog").
3. Click Next to display the "Load Wizard: Step 5 dialog".

Go to "Naming the business area, specifying object name and sorting options".

## Naming the business area, specifying object name and sorting options

The "Load Wizard: Step 5 dialog" enables you to enter a name and description and specify how Discoverer Administrator generates object names and which objects to sort for the business area.

**Figure 4–6** Load Wizard: Step 5 dialog



To name the business area and specify the folder and item, naming and sorting options:

1. Specify a name, description and select the check boxes for how you want Discoverer Administrator to generate folder and item names and whether you want to sort folders and/or items for the business area and click Finish.
2. (conditional step) This step (and the next step) applies only if you selected the check box, **Summaries based on folders that are created**, in the Load Wizard: Step 4.

**Note:** Discoverer Administrator displays the Recommended Summaries dialog that provides information about the summary folders that Automated Summary Management (ASM) will create for you (for more information about summary folders, see "Summary Wizard (ASM): Recommended Summaries dialog" and Chapter 14, "What are summary folders?").

3. Click Create to confirm your choice.



Discoverer Administrator displays a progress indicator while it generates your new business area (and summaries, if appropriate). When finished, the progress indicator disappears and the new business area is displayed on the "[Workarea: Data tab](#)".

**Note:** If you loaded your metadata from Oracle Designer, you must refresh the business area before it can be used. For more information, see "[How to synchronize a business area with the database](#)".

### **Important Note: User Access**

A new business area (and the data it contains), can only be accessed by the user ID that was used to create it. For more information about how to grant access privileges to other user IDs, see [Chapter 7, "How to specify a user or role \(responsibility\) that can access a business area"](#).

## **How to open an existing business area when connecting to Discoverer Administrator**

**Note:** The Load Wizard starts automatically when you connect to Discoverer Administrator.

To open an existing business area when connecting to Discoverer Administrator:

1. Click **Open an existing business area** in the "[Load Wizard: Step 1 dialog](#)" to display all the business areas in the EUL of the database to which you are connected.
2. Select a check box for each business area that you want to open or click **Select All** to select all the business areas.
3. Click **Finish** to open the selected business area(s).

## **How to open an existing business area when already connected to Discoverer Administrator**

To open an existing business area when already connected to Discoverer Administrator:

1. Choose **File | Open** to display the "[Open Business Area dialog](#)".
2. Move the business areas that you want to open from the **Available** list to the **Selected** list.

You can select more than one business area at a time by holding down the Ctrl key and clicking another business area.

3. Click OK to open the selected business area(s).

## How to copy business areas between EULs

To copy a business area from one EUL to another (e.g. from a development system to a production system) you must first export the business area from the first EUL then reconnect to the second EUL and import the export file for the business area into the second EUL:

1. To export a business area to a file, carry out the steps outlined in the following task using the link below:
  - [Chapter 3, "How to export selected business areas using the Export Wizard"](#).

Once you have completed the above task, go to the next step below.

2. Choose File | Connect.
3. Connect to the EUL that you want to move the business area into.
4. Choose File | Import.
5. To import the business area (exported in step 1, above) into the current EUL, carry out the steps outlined in the following task using the link below:
  - [Chapter 3, "How to import EUL objects from a file using the Import Wizard"](#).

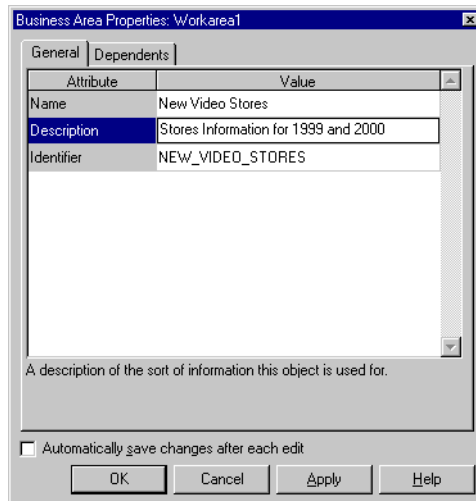
### Notes

The Export option exports the definitions for the business area only. It does not export the database, EUL tables, workbooks, or database objects referenced by the business area definitions.

## How to edit business area properties

To edit the properties of a business area:

1. Click a business area on the "[Workarea: Data tab](#)" and choose Edit | Properties to display the "[Business Area Properties dialog](#)".

**Figure 4–7 Business Area Properties dialog**

2. Set the business area name and description as required.

**Note:** Do not change the identifier unless you understand the impact of the change. For example, if you are developing EUL patches in a test environment to be imported to a production environment.

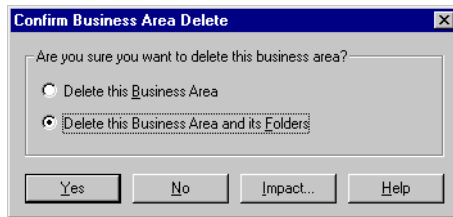
3. Click OK to confirm any changes made.

## How to delete a business area

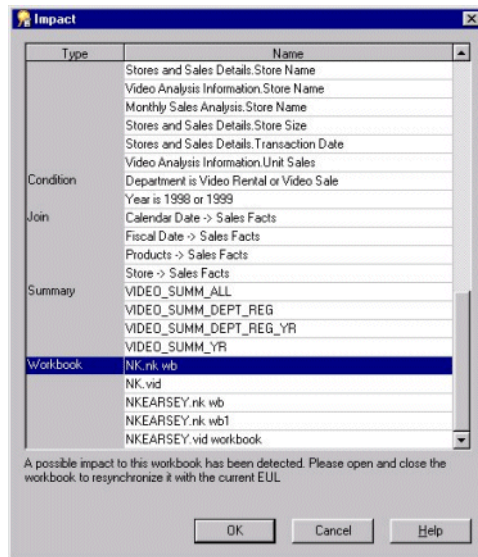
To delete a business area:

1. Click a business area on the "[Workarea: Data tab](#)" and choose Edit | Delete to display the "[Confirm Business Area Delete dialog](#)".

**Figure 4–8 Confirm Business Area Delete dialog**



2. Specify the scope of deletion that you require:
  - Select the **Delete this Business Area** radio button to remove the business area but not its folders, they remain in the EUL.  
**Note:** Folders can exist in the EUL but not belong to a business area (orphan folders).
  - Select the **Delete this Business Area and its Folders** radio button to remove the business area and all of the folders contained in that business area.  
**Note:** Folders that are part of another business area are not removed.  
**Note:** This is the default option and is usually recommended.
3. (optional) You can review the objects that might be affected by deleting this business area. To see the potential impact of the deletion:
  - a. Click Impact to display the "**Impact dialog**".  
The Impact dialog shows other objects that might be affected by the deletion and helps you to make the right choice.
  - b. (optional) Select a row to view text indicating what affect the current action will have on the EUL object.

**Figure 4–9** *Impact dialog*

c. When you have finished reviewing the impact of deleting the business area, click OK to close the Impact dialog.

4. Click Yes to delete the selected business area, based on the choices you have made.

## How to synchronize a business area with the database

You use the Refresh command to synchronize a business area with the source dictionary whenever the database schema is changed.

Examples of typical database modifications might include the following:

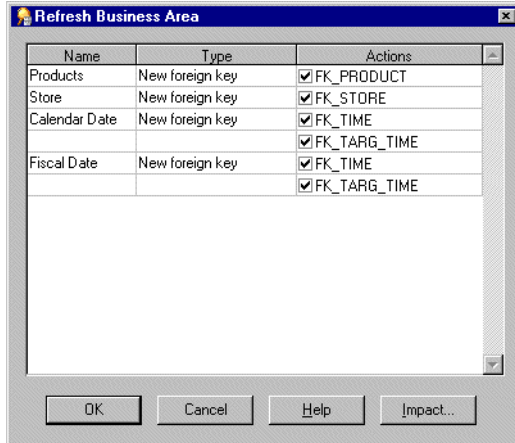
- adding tables
- adding columns
- adding joins
- changing the ownership of a table

To synchronize a business area with the database:

1. Select the business area that you want to refresh in the "Workarea: Data tab".
2. Choose File | Refresh to open the "Refresh Wizard dialog".
3. Select one of the following **Refresh business areas** from options:
  - On-line dictionary
  - Gateway
4. Click Finish to begin the refresh business areas process.

Where any objects have changed since the last refresh Discoverer Administrator displays the "Refresh Business Area dialog".

**Figure 4–10 Refresh Business Area dialog**



The Refresh Business Area dialog displays the:

- name of the object that has changed since the last refresh
  - type of change that has occurred to objects since the last refresh
  - effect that the refresh will have on the object
5. To decide whether you want to refresh each object:
    - select a check box next to each object you want to refresh
    - clear a check box next to each object you do not want to refresh

6. (optional) You can review objects that will be deleted when you refresh this business area. To see the potential impact of the refresh:
  - a. Click Impact to display the **"Impact dialog"**.
  - b. When you have finished reviewing the impact of refreshing this business area, click OK to close the Impact dialog.
7. Click OK for Discoverer Administrator to refresh the business area or selected objects.

## Notes about business area creation and maintenance

### Why might a business area (or folders within it) not be visible to a user?

Having created a business area, it is possible that a Discoverer end user might not be able to see the business area (or folders within the business area). For a user to see a business area or folders within it, the following conditions must all be met:

- The user must have access to the EUL. If the user is not the EUL owner, either the EUL must be publicly accessible or the user must be granted explicit access to the EUL. Also make sure that the user is accessing the EUL in which the business area was created.
- The user must have access to the business area. For more information about granting access to business areas, see:
  - [Chapter 7, "How to specify a user or role \(responsibility\) that can access a business area"](#)
  - [Chapter 7, "How to specify the business areas a user or role \(responsibility\) can access"](#)
- The user must have database SELECT access to the tables or views on which the folders in the business area are based.

**Hint:** If you are not sure whether a particular user has access to a specific database table or view, log in to SQL\*Plus as the user and type:

```
select count(*) from <ownername>.<objectname>;
```

where:

- <ownername> is the database username of the owner of the table or view
- <objectname> is the name of the table or view

If the user does not have access to the database table or view, an error message is displayed.

- The folders in a business area must be based on current database table or view definitions. If the table or view definition has changed, you must refresh the business area (for more information, see ["How to synchronize a business area with the database"](#)). For example, an end user might not be able to see a folder if an underlying column that the folder depends on was deleted from the table. To enable the Discoverer end user to see a folder in this, you must refresh the business area containing the folder.



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# Creating and maintaining folders

## Creating and maintaining folders

This chapter explains how you create and maintain folders using Discoverer Administrator, and contains the following topics:

- "What are folders?"
- "What are simple folders?"
- "What are complex folders?"
- "What are custom folders?"
- "About dependencies between folders"
- "About sharing folders across business areas"
- "How to create simple folders from the database"
- "How to create complex folders"
- "How to create custom folders"
- "How to edit folder properties"
- "How to edit a custom folder's SQL statement"
- "How to delete folders from a business area"
- "How to assign folders to a business area"
- "How to assign a folder to multiple business areas"
- "How to sort folders in a business area"
- "How to sort items in a folder"
- "How to re-order folders in a business area"

- ["How to validate folders in a business area"](#)

## What are folders?

A Discoverer folder is a representation of result set data. The visual concept of a folder in Discoverer is analogous to a directory in Windows where folders are the containers and items are the files held in the folders. A Discoverer folder represents a group of related items. Discoverer end users select items from one or more folders to get information from the database. As the Discoverer manager, it is your responsibility to create suitable folders to enable Discoverer end users to access the information they need.

There are three types of folder:

- simple folders, which contain items based on columns in a single database table or view
- complex folders, which can contain items based on columns from multiple database tables or views
- custom folders, which are based on SQL statements

To the Discoverer end user, the type of a particular folder is immaterial. Whether a folder is simple, custom, or complex is only important to the Discoverer manager. Even in Discoverer Administrator, there is very little difference in the behavior of these different types of folders. Folders can include items, calculated items, joins, conditions, item classes, and hierarchies. Items in a folder can be used in summary folders and to define hierarchies.

Discoverer end users work with folders within the context of business areas.

As the Discoverer Manager, you can assign a folder to one or more business areas. Note that a folder has a single definition, regardless of the number of business areas to which you assign it.

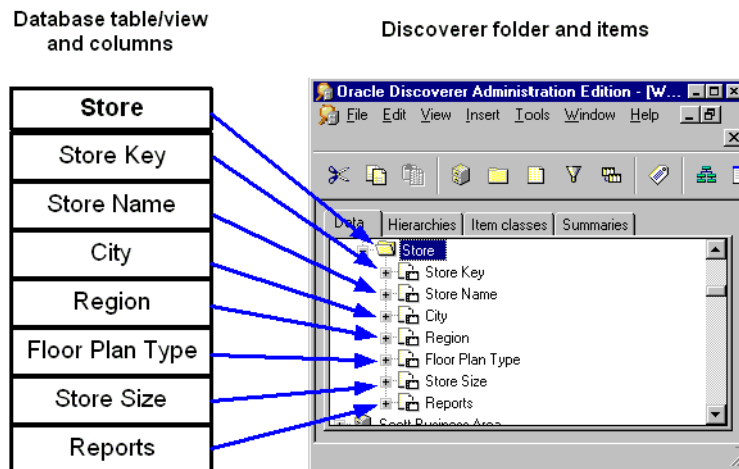
You can remove a folder from all business areas without deleting it from the EUL. Folders that exist in the EUL but which are not currently assigned to a business area are referred to as orphan folders.

## What are simple folders?

Simple folders contain items based on columns in a single database table or view. Items in a simple folder can also represent calculations on other items in the folder.

You create a simple folder by loading a table definition or table metadata from the database or a gateway.

**Figure 5–1** How Discoverer Administrator represents a table/view



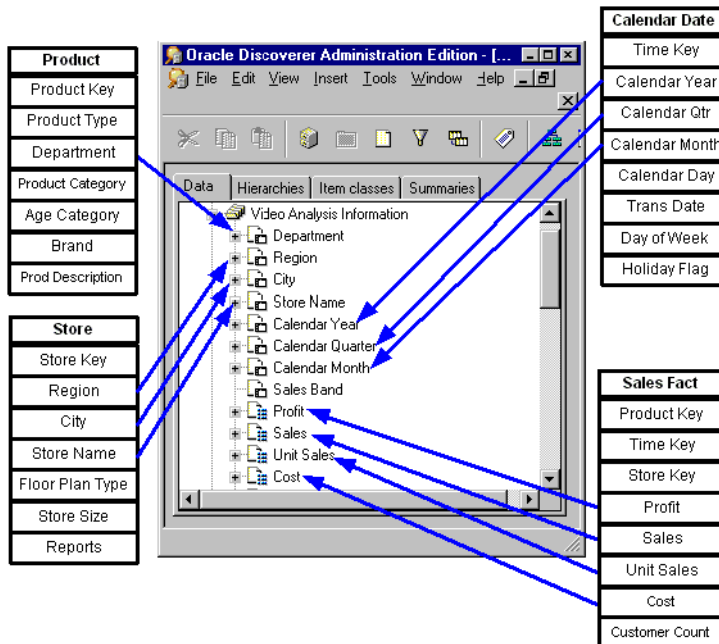
## What are complex folders?

Complex folders contain items from one or more other folders. Complex folders enable you to create a combined view of data from multiple folders. This is analogous to a view in the database.

Using a complex folder enables you to simplify the business area without creating a new database view. For example, you can create a complex folder called Dept-Emp which has columns from both the DEPT and EMP tables. The user can select from one folder instead of two.

For two items from different folders to belong to the same complex folder, a join condition must exist between the two folders. For more information about joins, see [Chapter 10, "What are joins?"](#).

**Figure 5–2** How a complex folder groups items from multiple source tables



## What are the benefits of using complex folders instead of database views?

You could produce the same result set using a database view instead of a complex folder. However, using a complex folder instead of a database view offers several advantages. You can:

- create a complex folder without the database privileges required to create a database view
- control access to a complex folder using the folder's business area
- manage complex folders entirely within Discoverer Administrator, whereas database views can be complicated to maintain

## What are custom folders?

Custom folders are folders based on a SQL statement which could include SET operators such as UNION, CONNECT BY, MINUS, INTERSECT and synonyms that you type directly into a dialog.

By defining a custom folder, you can quickly create a folder that represents a complicated result set. When you save the custom folder, Discoverer Administrator creates items using the 'Select' part of the SQL statement you have entered.

In Discoverer Plus, there is no distinction between a custom folder and a simple folder. A Discoverer end user can use a custom folder to build queries in the same way as any other type of folder.

## What are the differences between custom folders and simple folders?

Custom folders are very similar to simple folders, with the following exceptions:

Area	Simple Folder	Custom folder
Refresh	Simple folders are refreshed when the business area is refreshed	Custom folders are refreshed by editing and validating the existing SQL
Item properties	Items in simple folders have an Item Formula property.	Items generated in a custom folder do not have an Item Formula property. In other words, the only way to edit the formula of an item in a custom folder is to edit the SQL for the whole folder.
Folder properties	Simple folders have Database, Owner, and Object properties. Simple folders do not have a Custom SQL property.	Custom folders do not have Database, Owner, and Object properties. Custom folders have a Custom SQL property that contains the SQL statement used to generate the custom folder.

## Examples of custom folders

This section consists of the following examples:

- ["Example 1: Synonyms in a custom folder definition"](#)
- ["Example 2: Set Operator in a custom folder definition"](#)
- ["Example 3: Subquery in a custom folder definition"](#)
- ["Example 4: Optimizer hint in a custom folder definition"](#)
- ["Example 5: CONNECT BY Clause in a custom folder definition"](#)
- ["Example 6: Column Expression in a custom folder definition"](#)

- ["Example 7: Using a custom folder to improve LOV performance"](#)

### **Example 1: Synonyms in a custom folder definition**

```
SELECT ENAME, JOB, SAL FROM EMP@ORCL
```

In this example, EMP is a synonym that points to the EMP table on another database.

### **Example 2: Set Operator in a custom folder definition**

```
SELECT 'COMPANY1' COMPANY, ENAME, SAL FROM EMP@HQ
UNION
SELECT 'COMPANY2', COMPANY, ENAME, SAL FROM EMP@REGIONA
```

In this example, HQ and REGIONA are database links for remote databases. The result set is the union of all employees with a column named COMPANY1 to show which company they are from.

### **Example 3: Subquery in a custom folder definition**

```
SELECT ENAME, SAL FROM EMP
WHERE SAL > (SELECT AVG (SAL) FROM EMP)
```

In this example, the (SELECT AVG (SAL) FROM EMP) subquery is included in the folder definition.

### **Example 4: Optimizer hint in a custom folder definition**

```
SELECT /*+ FULL(scott_emp) PARALLEL (scott_emp, 5) */
ename
FROM scott.emp scott_emp;
```

In this example, the PARALLEL hint overrides the degree of parallelism specified in the emp definition.

### **Example 5: CONNECT BY Clause in a custom folder definition**

```
SELECT EMPNO, ENAME, JOB FROM EMP
CONNECT BY PRIOR EMPNO=MGR
START WITH KING
```

In this example, the CONNECT BY clause defines a hierarchical relationship in which the EMPNO value of the parent row is equal to the MGR value of the child row (i.e. it filters each row where the PRIOR condition is true).

### Example 6: Column Expression in a custom folder definition

```
SELECT ENAME, SAL*12+NVL(COMM,0) ANNUAL_SALARY
FROM EMP
```

In this example, the alias `ANNUAL_SALARY` is required on the `SAL*12+NVL(COMM,0)` expression.

Although a custom folder can contain any valid SQL statement, any column expressions must be aliased in the same way that a SQL view definition would be aliased. In these cases, the alias will be used as the item name.

No alias is required on simple column expressions like `ENAME`.

### Example 7: Using a custom folder to improve LOV performance

You can use a custom folder to create a list of values for an item in a folder where you know that the list values in the database will not change. This is more efficient than running a query using a list of values defined against an item in a folder that has a much larger number of rows than the number of distinct values.

If you have a smaller number of static values you can use a custom folder to create a local list of values within the End User Layer.

For example, if you want a list of values for North, South, East and West, create a custom folder called `Region_lov` and enter the following SQL:

```
SELECT 'NORTH' REGION FROM sys.dual
UNION
SELECT 'SOUTH' REGION FROM sys.dual
UNION
SELECT 'EAST' REGION FROM sys.dual
UNION
SELECT 'WEST' REGION FROM sys.dual
```

The above SQL creates one item called `Region` that you can use as a list of values to significantly improve performance.

For more information about lists of values, see [Chapter 9, "What are lists of values?"](#).

## About dependencies between folders

If you copy an item from a simple folder and paste the item into the same simple folder, the new item is completely separate from the original item and has a new

name generated (e.g. region1). Changes in either item are never reflected in the other item.

If you copy an item from a simple folder and paste the item into a complex folder, the new item in the complex folder is still related to the original item. You can rename the new item and change its properties without the changes affecting the original item. However, the new item is dependent on the original item because the formula of the new item references the name of the original item. If you modify the formula of the original item, the data returned by the new item will also change. Similarly, if you delete the original item, the new item is also deleted because its formula property references the original item.

For example, if you copy the item 'Region' from the Store table and paste it into the complex folder 'Video Analysis Information' and then edit the properties of the copied item 'Region' in the complex folder 'Video Analysis Information'. You will notice that the Formula property of the Region item is itself a calculated item that uses the calculation Store.Region. The calculation Store.Region indicates that the item is dependant on the item Region in the folder Store. The conditions that were described in the previous paragraph will apply to the Region item that you copied into the complex folder 'Video Analysis Information'.

You can view a list of the dependencies for an item on the Dependencies tab of the Item Properties dialog.

A folder represents a set of data that can be returned from the database. If you apply a mandatory condition to a folder (e.g. where Year=2000), the set of data that can be returned will change. A complex folder built using this folder will reflect the restricted set of data of the source folder. If you later remove the mandatory condition from the source folder, the change is reflected in the complex folder.

## About sharing folders across business areas

Data that is important to one department is often useful to another. Discoverer Administrator therefore enables you to share a folder that you have created in one business area with other business areas. For example, you might want to share a Sales Facts folder that includes columns for Income and Costs in the business areas you create for both the Marketing Department and the Accounting Department.

If you make changes to a folder in one business area, the changes are made to the folder in every business area that uses the folder.



## How to create simple folders from the database

To create simple folders from the database in an existing business area:

1. On the "[Workarea: Data tab](#)", select the business area in which you want to create a simple folder.
2. Choose Insert | Folder | from Database to display the "[Load Wizard: Step 1 dialog](#)".
3. Click **On-line Dictionary** to specify the location of the table/view on which you want to base the simple folder.
4. Click Next to display the "[Load Wizard: Step 2 dialog](#)".
5. Specify the database that owns the database table/view on which you want to base the simple folder.
6. Select a radio button for a database user to base the simple folder on.
7. Click Next to display the "[Load Wizard: Step 3 dialog](#)".
8. Expand the + symbol in the **Available** list to see the objects owned by the user.
9. Move the object on which you want to base the simple folder from the **Available** list to the **Selected** list.
10. Do one of the following:
  - click Next to modify the default settings for the simple folder in the "[Load Wizard: Step 4 dialog](#)"
  - click Finish to create the simple folder based on the table you specified using default settings
11. If you clicked Next in the previous step, do one of the following:
  - click Next to modify the default settings for the simple folder in the "[Load Wizard: Step 5 dialog](#)"
  - click Finish to create the simple folder based on the table you specified using default settings
12. If you clicked Next in the previous step, click Finish to create the simple folder based on the table you specified using the settings you specified.

## How to create complex folders

To create a complex folder:

1. On the "[Workarea: Data tab](#)", select the business area in which you want to create a complex folder.
2. Choose Insert | Folder | New to create a new complex folder.
3. Click the new folder's icon on the Data tab and choose Edit | Properties to display the "[Folder Properties dialog](#)".
4. (optional) Specify a more descriptive name for the new folder in the **Name** field.
5. (optional) Specify a description for the new folder in the **Description** field.
6. Close the Folder Properties dialog if it is open.
7. On the "[Workarea: Data tab](#)", Drag an item from any folder in any open business area to the new folder.

**Hint:** You might find it easier to drag items between folders if you have two Workareas open. To open a second Workarea, choose Window | New Window.

8. Drag the items into the new folder as required.

Each item that you add to a complex folder must belong to a folder that is joined to the folder of at least one other item that is already in the complex folder. If this is not the case, Discoverer Administrator will display an error dialog. For more information about joins, see [Chapter 10, "Creating and maintaining joins"](#).

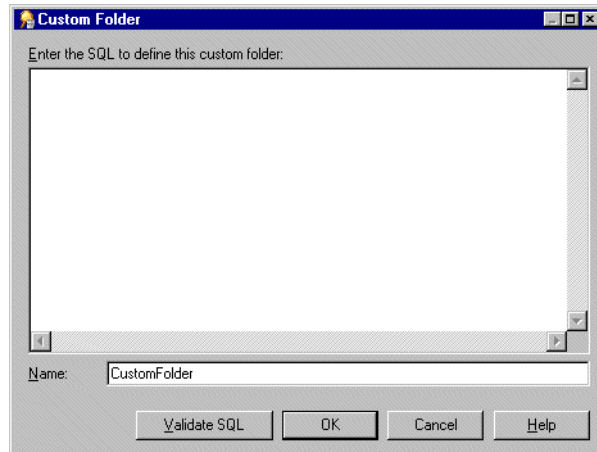
### Notes

If you include an item from a simple folder in a complex folder, the new item in the complex folder is not totally independent of the original item. For more information, see "[About dependencies between folders](#)".

## How to create custom folders

To create a custom folder:

1. On the "[Workarea: Data tab](#)", select a business area (or any object within a business area).
2. Choose Insert | Folder | Custom to display the "[Custom Folder dialog](#)".

**Figure 5–3 Custom Folder dialog**

3. Specify the SQL statement on which the custom folder will be based.  
You can include comments as separate lines within the SQL statement by starting the comment line with two dash characters (i.e. - -).
4. Specify the name of the custom folder in the **Name** field.
5. Click Validate SQL to ensure you have entered valid SQL.
6. Click OK to validate the SQL statement and save the custom folder.

### Notes

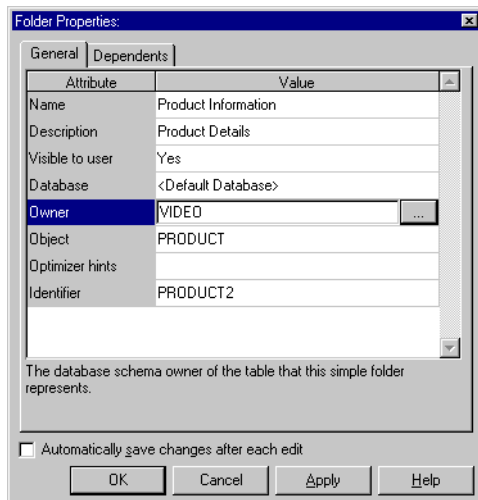
- To enable you to create custom folders before the underlying database objects have been created or made available, Discoverer Administrator permits you to save a custom folder even if the SQL is invalid. Note that Discoverer end users will not be able to query the database object until the SQL is valid.
- For examples of SQL statements you might enter, see ["Examples of custom folders"](#).
- Where the SQL references multiple database objects, you must define joins between those objects. For more information, see [Chapter 10, "Creating and maintaining joins"](#).

## How to edit folder properties

To edit the properties of a folder:

1. On the "Workarea: Data tab", click on the folder to select it.  
You can select more than one folder by pressing the Ctrl key and clicking another folder.
2. Choose Edit | Properties to display the "Folder Properties dialog".

**Figure 5–4 Folder Properties dialog**



If you selected multiple folders, the Folder Properties dialog displays a value for each property that has the same value for all of the selected folders. If the value for a particular property is not the same for all of the selected folders, no value is displayed for that property.

3. Make the changes as required.  
**Hint:** To save the changes you make as you make them, select the **Automatically save changes after each edit** check box. With this option selected, you do not have to click OK or Apply.
4. Click OK to save the changes you have made.

## Notes

- You can assign a folder to more than one business area. However, there is only ever one definition of the folder in the EUL and that definition is shared by all the business areas to which the folder is assigned. If you modify the folder definition, the change is reflected in all the business areas to which the folder is assigned. For more information, see ["About sharing folders across business areas"](#).
- You can change a folder's name at any time because Discoverer Administrator identifies folders using an internal reference system called identifiers (for more information, see [Chapter 3, "What are identifiers?"](#)). Changing a folder's name does not alter the structure of the business area. However, folder names must be unique within the EUL. Note also that item names must be unique within a particular folder.
- You can change the database user that owns the database object on which a simple folder is based without changing the name of the object itself. For example, you might want to do this when moving from a development to a production environment. To change the database user, click the button beside the **Owner** field to display the ["Choose User dialog"](#) and specify the new database user.
- You can base a simple folder on a table/view without specifying the database user that owns that table/view. You might want to do this:
  - to enable different Discoverer Plus users to access database tables/views that have the same name but which exist in their own database users (e.g. for Oracle Applications users)
  - to create/maintain an EUL for which the tables or table owners are not yet available
  - to create/maintain an EUL to which you as the Discoverer Manager do not have access
  - to move the EUL between different databases where the person who owns the data is different

To base a simple folder on a table/view without specifying the database user name, clear the **Owner** field. When the **Owner** field is left blank, Discoverer Administrator generates SQL that does not include the owner before the table name.

For example, if the **Owner** field contains the name of the schema that owns the table/view, the generated SQL statement might be:

select <column> from <owner>.<table>

If you clear the **Owner** field, the generated SQL statement would be:

select <column> from <table>

If the object is not in the current schema, a warning is displayed.

## How to edit a custom folder's SQL statement

To edit a a custom folder's SQL statement:

1. On the "[Workarea: Data tab](#)", select the custom folder.
2. Choose Edit | Properties to display the "[Folder Properties dialog](#)".
3. Click the Custom SQL field to display the "[Custom Folder dialog](#)".

**Hint:** You can resize the Custom Folder dialog to view more of the SQL statement.

4. Make changes as required.
5. Click Validate SQL to ensure you have entered valid SQL.
6. Click OK to validate the SQL statement and save the custom folder.

### Notes

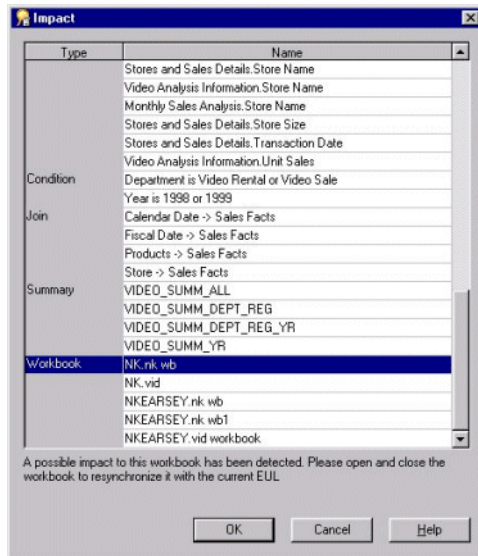
- To enable you to create custom folders before the underlying database objects have been created or made available, Discoverer Administrator permits you to save a custom folder even if the SQL is invalid. Note that end users will not be able to query the object until the SQL is valid.
- Where the SQL references multiple database objects, you must define joins between those objects. For more information, see [Chapter 10, "What are joins?"](#)
- Discoverer Administrator analyzes the modified SQL statement to assess the changes you have made. If Discoverer Administrator determines that the changes will affect existing items or create new items, Discoverer Administrator displays the "[Impact dialog](#)" that shows you each item that is affected. Use the Impact dialog to help you decide whether to confirm the changes you have made, make further changes, or abandon the edit.

## How to delete folders from a business area

To delete a folder from a business area:

1. On the "[Workarea: Data tab](#)", select the folder you want to delete.  
You can select more than one folder by pressing the Ctrl key and clicking another folder.
2. Choose Edit | Delete to display the "[Confirm Folder Delete dialog](#)".  
The Confirm Folder Delete dialog enables you to choose how you want to delete the folder and to assess the impact of deleting the folder.
3. Specify how you want to delete the folder by selecting one of the following radio buttons:
  - **Delete from this Business Area**  
Removes the selected folder from the current business area. Note that this option does not delete the folder from the EUL. If the folder is not shared by any other business area, it becomes an orphan folder.
  - **Delete from the End User Layer**  
Removes the selected folder from all business areas that contain that folder. Note that this option also completely removes the folder definition from the EUL.
4. (optional) You can review the objects that might be affected by deleting this folder. To see the potential impact of the deletion:
  - a. Click Impact to display the "[Impact dialog](#)".  
The Impact dialog displays other objects that might be affected by the deletion and helps you to make the right choice.
  - b. (optional) Select a row to view text indicating what affect the current action will have on the EUL object.

**Figure 5–5 The Impact dialog**



- c. When you have finished reviewing the impact of deleting the folder, click OK to close the Impact dialog.
5. When you are certain that you want to delete the selected folder, click Yes. The selected folder is deleted in the way that you specified.

### Notes

- Before deleting a folder, you might find it useful to identify the business areas to which the folder is assigned. To identify the business areas, click on the folder you want to delete on the Data tab of the Workarea and choose Tools | Manage Folders to display the ["Manage Folders dialog: Business Area > Folder tab"](#). The Manage Folders dialog contains a drop-down list of other business areas that hold the selected folder.
- To delete an orphan folder from the EUL, you must assign the folder to a business area and then delete the folder. For more information, see ["How to assign folders to a business area"](#).



## How to assign folders to a business area

To assign folders to a specific business area:

1. Choose Tools | Manage Folders to display the "[Manage Folders dialog: Business Area > Folder tab](#)".

You use the Business Area -> Folder tab to assign any number of folders (including orphan folders) to a specific business area.

2. Select the business area to which you want to assign one or more folders from the **Business area** drop down list.

By default, the **Business area** drop down list displays the business area currently selected in the Workarea.

3. Move the required folders from the **Available folders** list to the **Current folders** list.

You can select more than one folder by pressing the Ctrl key and clicking another folder.

4. Click OK to save the changes you have made.

The business area now contains the folders you specified in the **Current folders** list.

## How to assign a folder to multiple business areas

To assign a folder to multiple business areas:

1. Choose Tools | Manage Folders and display the "[Manage Folders dialog: Folder > Business Area tab](#)".

Use the Folder -> Business Area tab to assign a specific folder (including an orphan folder) to multiple business areas.

2. Select the folder that you want to assign to one or more business areas from the **Folder** drop down list.

3. Move the required business areas from the **Available business areas** list to the **Current business areas** list

You can select more than one business area by pressing the Ctrl key and clicking another business area.

4. Click OK to save the changes you have made.

The folder is now assigned to the business areas you specified in the **Current business areas** list.

## How to sort folders in a business area

You can alphabetically sort folders in a selected business area.

To alphabetically sort folders in a business area:

1. Select a business area in the "[Workarea: Data tab](#)".
2. Choose Edit | Sort Folders.

**Note:** Discoverer Administrator displays the "[Alphabetical Sort dialog](#)" indicating the number of folders that will be alphabetically sorted and stating that the existing order will be lost.

3. Click Yes to continue.

### Notes

Folders can also be sorted during bulk load when you load a business area. For information about sorting folders when using the:

- Load Wizard, see [Chapter 4, "How to create a business area using the Load Wizard"](#)
- command line interface, see [Chapter 21, "/load"](#)

## How to sort items in a folder

You can alphabetically sort items and conditions in a selected folder.

To alphabetically sort items in a folder:

1. Select a folder from a business area in the "[Workarea: Data tab](#)".
2. Choose Edit | Sort items.

**Note:** Discoverer Administrator displays the "[Alphabetical Sort dialog](#)" indicating the number of items that will be alphabetically sorted and stating that the existing order will be lost.

3. Click Yes to continue.

## Notes

Items can also be sorted during bulk load when you load a business area. For information about sorting items when using the:

- Load Wizard, see [Chapter 4, "How to create a business area using the Load Wizard"](#)
- command line interface, see [Chapter 21, "/load"](#)

## How to re-order folders in a business area

The order in which you see folders displayed in Discoverer Administrator is the same order that Discoverer end users will see. By default, folders within a business area are displayed in alphabetical order. However, you might want to change the default order to:

- group folders that are logically connected
- move the most commonly used folders to the top of the list

To change the order of folders in a business area:

1. Display the ["Workarea: Data tab"](#).
2. Drag and drop the folder to the position where you want it to appear in the list of folders.

## How to validate folders in a business area

Occasionally, you might encounter difficulties with Discoverer Administrator folders. For example, you might be able to see folders in Discoverer Administrator that Discoverer end users cannot access. Use the Validate Folders facility to help you diagnose the problem.

To validate the link between the folders in a business area and the database objects they refer to:

1. Choose View | Validate Folders.

The Validate Folders facility uses the database parser to check that the relevant tables exist in the database and the EUL owner has SELECT access to them.



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# Managing connections to Discoverer

## Managing connections to Discoverer

This chapter explains how Discoverer end users connect to Discoverer using connections. It contains the following topics:

- ["What are Discoverer connections?"](#)
- ["About types of connection"](#)
- ["About the Discoverer connections page"](#)
- ["How to create public connections"](#)
- ["How to enable Discoverer users to create user defined connections"](#)

## What are Discoverer connections?

Discoverer connections are login details used by Discoverer end users to connect to Discoverer, and comprise the following:

- a user name - to identify the user
- a password - to authenticate the user
- a database name - to specify the database containing the information that the user wants to analyze
- (optional) an Oracle Applications Responsibility - to specify a user's responsibility when using Discoverer with Oracle Applications
- an EUL - to identify the End User Layer to be used
- a language - to specify a language for Discoverer

## About types of connection

There are two types of connection:

- user defined connections - see "[About user-defined connections](#)"
- public connections - see "[About public connections](#)"

### About user-defined connections

User-defined connections are created by Discoverer users when they connect to Discoverer using a specific connection (i.e. a user name, password, and database name) provided by the Discoverer manager. User-defined connections have the following characteristics:

- a user-defined connection is private to the Discoverer user that created it
- Discoverer users create and maintain their own user-defined connections

For more information about enabling Discoverer end users to create connections, see "[How to enable Discoverer users to create user defined connections](#)"

### About public connections

Public connections enable you to provide groups of Discoverer Plus and Viewer users with pre-defined connections that allow them to access Discoverer workbooks. For more information about creating public connections, see "[How to create public connections](#)".

For example, you might create a public connection called Analyze Sales that connects users to a database called Sales\_DB as the user Sales Analyzer. All users connecting to Sales\_DB as Sales Analyzer will have access to sales workbooks.

If you want to provide the Discoverer Plus tutorial to Discoverer users, you might create a public connection called 'Start tutorial', which connects to the tutorial database as a tutorial user.

Only the Discoverer manager can maintain public connections. Discoverer Plus and Viewer users cannot add, edit, or delete public connections.

## About the Discoverer connections page

The Discoverer Connections page is used to connect to Discoverer Viewer and Discoverer Plus using single sign-on (SSO).

The figure below shows the Discoverer connections page. In this example, there are four connections available in the **Connection** list (called QA Tests, Bug Database, Demo Workbooks, and Developer Tests). To start Discoverer using the "QA Tests" connection, the Discoverer end-user clicks **QA Tests**.

Figure 6–1 Discoverer Connections page

Run analysis reports

Create Connection

Details	Connection	Description	Update	Delete
▶ Show	<a href="#">Start tutorial</a>	Public connection for accessing the Discoverer tutorial		
▶ Show	<a href="#">January reports</a>	Analyze January figures		
▶ Show	<a href="#">Annual summary</a>	Analyze annual figures		

Key to figure:

- Click an existing connection to start Discoverer using the login details stored in the connection.
  - Click here to create a new connection, where you store login information.
  - Click here to edit a connection, where you change login information.
- Note:** Notice that in this case the Edit option is greyed out because the connection is a public connection created by the Discoverer manager.
- Click here to delete a connection, where you delete login information.

- e. (optional) Click here to display more details about the connection (Netscape Navigator only).

### **Notes**

For more information about using connections, see the *Oracle9iAS Discoverer Plus User's Guide*.

## **How to create public connections**

You create a public connection when you want to provide a pre-defined login to Discoverer Plus and Discoverer Viewer users. For example, you might create a public connection called 'Start tutorial', which connects to the tutorial database as a tutorial user. You use Oracle Enterprise Manager to create public connections. For more information about Oracle Enterprise Manager, see the *Oracle9i Application Server Administrator's Guide*.

To create a public connection:

1. Start Oracle Enterprise Manager.



Figure 6–2 Oracle Enterprise Manager

The screenshot displays the Oracle Enterprise Manager interface for an Application Server named IAS-1. The server is currently in an 'Up' status. The CPU usage is 0% (Application Server), 0% (Idle), and 100% (Other). The memory usage is 1% (Application Server), 69% (Free, 2,043MB), and 30% (Other, 891MB). Below the usage graphs, there are buttons for 'Stop IAS-1' and 'Restart IAS-1'. The 'System Components' section includes a table with the following data:

Select	Name	Type	Status	Uptime (days)	CPU Usage (%)	Memory Usage (MB)
<input checked="" type="radio"/>	<a href="#">My Web Cache</a>	Web Cache	⊕			
<input type="radio"/>	<a href="#">UM System</a>	Oracle Unified Messaging System 9.0	?			
<input type="radio"/>	<a href="#">BC4J</a>	oracle_bc4j	?			

2. Click the name of the Discoverer component in the **Name** column to display the Oracle9iAS Discoverer Services Configuration page.





For example, if the Discoverer component is called 'My Discoverer', click 'My Discoverer' to display the Oracle9iAS Discoverer Services Configuration page.

**Figure 6–3 Oracle9iAS Discoverer Services Configuration page**



### Oracle9iAS Discoverer Services Configuration

Oracle9iAS Discoverer empowers business users at all levels of the organization with on-demand access to information from datamarts, data warehouses, or OLTP systems. Utilizing any standard web browser, Oracle9iAS Discoverer provides users with ad hoc query, reporting, analysis, graphing and web-publishing capabilities in order to make faster and more informed e-business decisions.

Configuration	Description	Update
General Discoverer	Locale, graph and connection options	
Discoverer Viewer	Stylesheet and progress page options	
Discoverer Plus	Communication protocol options	
Discoverer Portlet Provider	Session and stylesheet pooling options	

3. Click the Update icon in the **General Discoverer** row to display the General Discoverer Configuration page.

**Figure 6–4** General Discoverer Configuration page

### Discoverer Public Connections

Use a public connection to allow users to see data without logging into Discoverer. Use a database account that has appropriate (restricted) database privileges.

[Create Connection](#)

Connection	Description	Update	Delete
Connection	Description	Update	

### Discoverer User Defined Connections

Users can define their own Discoverer connections based on database accounts accessible to them. These user connections will store the same type of information as the public connections and are only available to the user who defines them.

Allow users to define their own connections in Discoverer Plus and Discoverer Viewer

[Cancel](#) [Apply](#)

---

Copyright 2001, Oracle Corp. [Targets](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

4. Click Create Connection to display the Create Discoverer Public Connection page.

**Figure 6–5** Create Discoverer Public Connection page

ORACLE  
Enterprise Manager

Preferences Help

Targets

### Create Discoverer Public Connection

#### Connection Name and Description

Enter a connection name that is easy to remember. Add a description for this connection, followed by the database account details.

Connection Name

Connection Description

Locale

This locale is used when there is no locale explicitly specified on the URL (&nlst).

#### Database Account Details

Allow users in Discoverer Plus and Discoverer Viewer to see database account

5. Enter the connection details, then click Apply to save the details.

The new connection that you created is displayed in the Discoverer Public Connections list on the General Discoverer Configuration page.

When Discoverer end users connect to Discoverer Plus or Discoverer Viewer, they will be able to select the connection that you have just created (for more information, see example below).

**Figure 6–6 Connections dialog in Oracle9iAS Discoverer Plus**

In the example above, the three connections (Start tutorial, Analyze network performance, and Daily reports) are public connections that are available to all Discoverer users. Notice that the Update and Delete icons are grayed out, indicating that Discoverer end users cannot change or delete them.

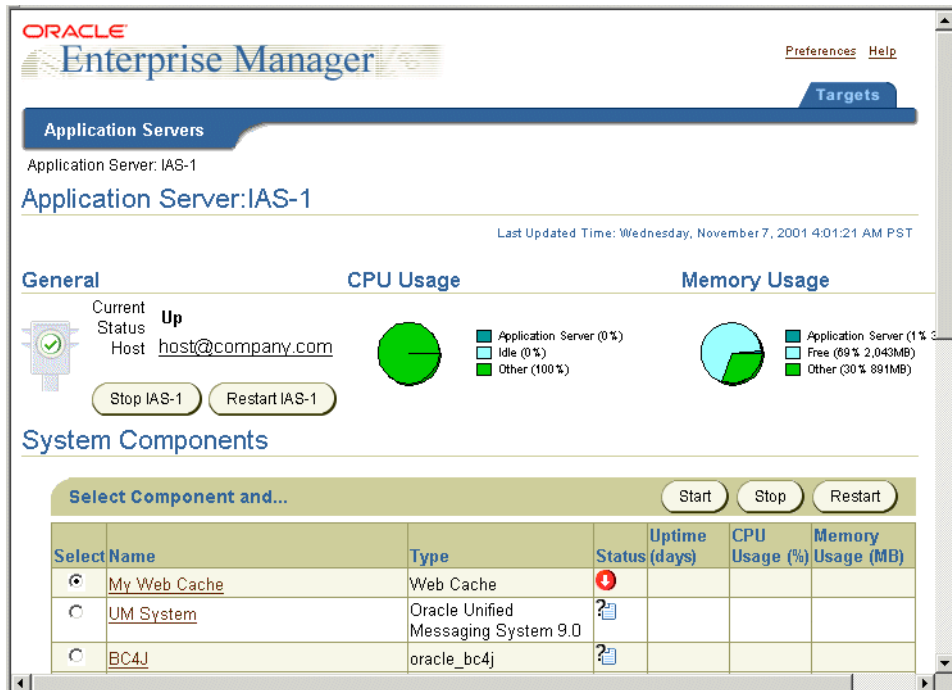
## How to enable Discoverer users to create user defined connections

You enable Discoverer Plus and Discoverer Viewer users to create user-defined connections when you want users to manage their own Discoverer connections. You use Oracle Enterprise Manager to enable users to create user-defined connections. For more information about Oracle Enterprise Manager, see the *Oracle9i Application Server Administrator's Guide*.

To enable Discoverer Plus and Discoverer Viewer users to create user-defined connections:

1. Start Oracle Enterprise Manager.

Figure 6–7 Oracle Enterprise Manager







2. Click the name of the Discoverer component in the **Name** column to display the Oracle9iAS Discoverer Services Configuration page.

For example, if the Discoverer component is called 'My Discoverer', click 'My Discoverer' to display the Oracle9iAS Discoverer Services Configuration page.

**Figure 6–8 Oracle9iAS Discoverer Services Configuration page**

### Oracle9iAS Discoverer Services Configuration

Oracle9iAS Discoverer empowers business users at all levels of the organization with on-demand access to information from datamarts, data warehouses, or OLTP systems. Utilizing any standard web browser, Oracle9iAS Discoverer provides users with ad hoc query, reporting, analysis, graphing and web-publishing capabilities in order to make faster and more informed e-business decisions.

Configuration	Description	Update
General Discoverer	Locale, graph and connection options	
Discoverer Viewer	Stylesheet and progress page options	
Discoverer Plus	Communication protocol options	
Discoverer Portlet Provider	Session and stylesheet pooling options	

3. Click the Update icon in the **General Discoverer** row to display the General Discoverer Configuration page.

**Figure 6–9 General Discoverer Configuration page**

**Discoverer Public Connections**

Use a public connection to allow users to see data without logging into Discoverer. Use a database account that has appropriate (restricted) database privileges.

Create Connection

Connection	Description	Update	Delete
Connection	Description	Update	

**Discoverer User Defined Connections**

Users can define their own Discoverer connections based on database accounts accessible to them. These user connections will store the same type of information as the public connections and are only available to the user who defines them.

Allow users to define their own connections in Discoverer Plus and Discoverer Viewer

Cancel Apply

Targets | Preferences | Help

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4. Select the **Allow users to define their own connections** check box.
5. Click **Apply** to save the details and close the General Discoverer Configuration page.

When Discoverer end users connect to Discoverer Plus or Discoverer Viewer, they will be able to add new connections using the **Create Connection** button.



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# Controlling access to information

## Controlling access to information

This chapter explains how to control access to information using Discoverer Administrator, and contains the following topics:

- "About Discoverer and security"
- "About Discoverer access permissions"
- "About Discoverer task privileges"
- "How to specify a user or role (responsibility) that can access a business area"
- "How to specify the business areas a user or role (responsibility) can access"
- "How to specify the tasks a user or role (responsibility) can perform"
- "How to specify a user or role (responsibility) to perform a specific task"
- "How to set query retrieval limits"
- "How to set scheduled workbook limits"

## About Discoverer and security

As a Discoverer manager, it is your responsibility to control the information that users can access and what they can do with that information. You use Discoverer access permissions and task privileges as follows:

- you use Discoverer access permissions to control who can see and use the data in business areas
- you use Discoverer task privileges to control the tasks each user is allowed to perform

You can grant Discoverer access permissions and task privileges to database roles as well as to database users. When you grant access permissions or task privileges to a role, all users with that role have the role's access permissions and task privileges. If you are running Discoverer Administrator in Oracle Applications mode, you grant access permissions or task privileges to Oracle Applications Responsibilities instead of roles. For more information about Oracle Applications mode, see [Chapter 17, "What features does Discoverer support for Oracle Applications users?"](#).

The access permissions and task privileges that you grant in Discoverer Administrator only apply to Discoverer's business areas and not to the underlying database tables. Data access rights to the database tables remain under the control of the database administrator.

Regardless of the access permissions and task privileges that you set in Discoverer Administrator, a Discoverer end user only sees folders if that user has been granted the following database privileges:

- SELECT privilege on all the underlying tables used in the folder
- EXECUTE privilege on any PL/SQL functions used in the folder

You can enable a user to perform administrative tasks (e.g. the creation of folders, calculations, conditions, hierarchies, summaries) in a business area by granting that user Administration privilege on the business area. A user with the Administration privilege on a particular business area can also grant Administration privilege on that business area to other users. Note that although you can devolve business area administration to multiple users, it is often easier to maintain control with a single administrator for each business area.

## About Discoverer access permissions

Discoverer access permissions enable you to control who can see and use the data in business areas.

You control access to business areas in two ways:

- by specifying the business areas that a particular user or role can access (for more information, see ["How to specify the business areas a user or role \(responsibility\) can access"](#))
- by specifying the users or roles that can access a particular business area (for more information, see ["How to specify a user or role \(responsibility\) that can access a business area"](#))

Before Discoverer end users see folders in a business area, Discoverer confirms that the user has database access to the tables referenced by the folders. If the user does not have access to a table referenced by a folder, Discoverer does not display the folder. You can override this behavior (e.g. to improve performance where access privileges rarely change) by changing the value of the `ObjectsAlwaysAccessible` registry setting (for more information, see [Chapter 22, "Discoverer registry settings"](#)).

## About Discoverer task privileges

Discoverer task privileges enable you to control the tasks each user is allowed to perform.

You use task privileges to specify whether a Discoverer end user is able to:

- create new worksheets or edit existing ones (without this option, a user only has the ability to run predefined worksheets)
- use item drills, drill to related items, and drill from summary to detail items
- drill out to launch other applications
- grant access to workbooks to other users
- create and edit scheduled workbooks
- save workbooks to the database
- collect query performance statistics

You also use task privileges to specify whether a user of Discoverer Administrator is able to:

- edit only the formatting information in an existing business area
- create new business areas and edit existing ones
- create summary tables
- grant and revoke EUL privileges
- maintain the scheduled workbooks of end users

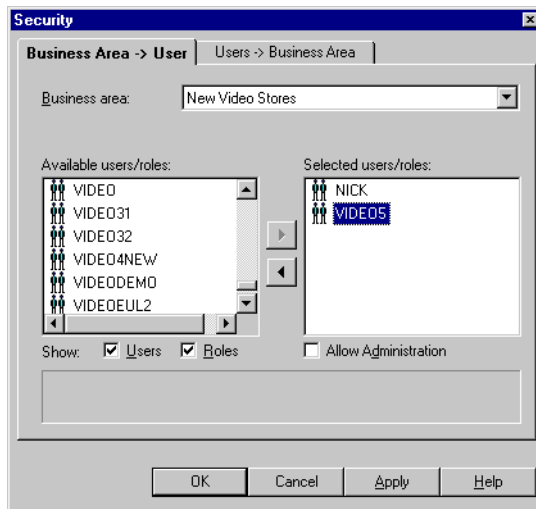
## How to specify a user or role (responsibility) that can access a business area

**Note:** When Oracle Applications database users are connected, Discoverer displays responsibilities instead of roles.

To specify the users or roles that can access a specific business area:

1. Choose Tools | Security and display the "[Security dialog: Business Area -> User tab](#)".

**Figure 7-1** Security dialog: Business Area->User tab



2. Select the business area to which you want to grant access from the **Business area** drop down list.
3. Specify the content of the **Available users/roles** list by selecting the **Users** check box and/or the **Roles** check box as appropriate.
4. Move the users or roles that you want to have access to the selected business area from the **Available users/roles** list to the **Selected users/roles** list.

You can select more than one user or role by pressing the Ctrl key and clicking another user or role.

5. For each new user or role you add to the **Selected users/roles** list, follow the instructions below to specify whether they have administration access to the business area:
  - a. Click the user or role in the **Selected users/roles** list.
  - b. Select or clear the **Allow Administration** check box as required.

The setting of a user's **Allow Administration** privilege controls which administration tasks the user can perform. For more information, see "[How to specify the tasks a user or role \(responsibility\) can perform](#)".
6. Click OK to save the changes you have made and close the Security dialog.

### Notes

- To remove access to a business area from a user or role, move the user or role from the **Selected users/roles** list to the **Available users/roles** list.
- The **Available users/roles** list includes a role called PUBLIC. Select this role to view or edit the default access permissions for users or roles whose permissions you have not yet defined.
- If you are running Discoverer Administrator as an Oracle Applications user, the Security dialog shows Oracle Applications Responsibilities instead of roles. For more information about Applications mode, see [Chapter 17, "What features does Discoverer support for Oracle Applications users?"](#).

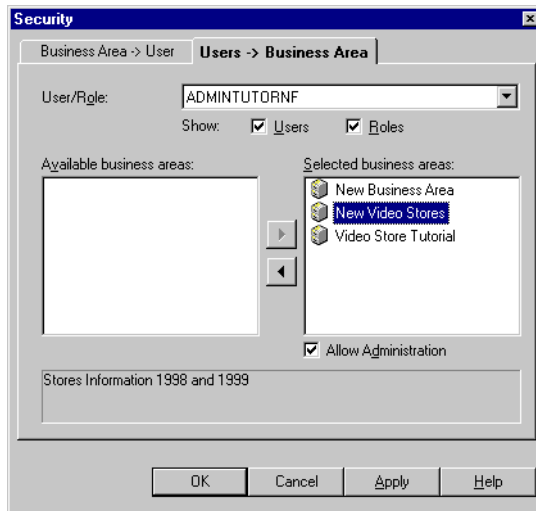
## How to specify the business areas a user or role (responsibility) can access

**Note:** When Oracle Applications database users are connected, Discoverer displays responsibilities instead of roles.

To specify the business areas that a user or role can access:

1. Choose Tools | Security and display the "[Security dialog: Users - > Business Area tab](#)".

**Figure 7–2 Security dialog: Users-> Business Area tab**



2. Specify the content of the **User/Role** drop down list by selecting the **Users** check box and/or the **Roles** check box as appropriate.
3. Select the user or role to which you want to grant access from the **User/Role** drop down list.
4. Move the business areas that you want the selected user or role to have access to from the **Available business areas** list to the **Selected business areas** list.  
You can select more than one business area by pressing the Ctrl key and clicking another business area.
5. For each new business area you add to the **Selected business areas** list, follow the instructions below to specify whether the selected user or role has administration access to the business area:
  - a. Click the business area in the **Selected business areas** list.
  - b. Select or clear the **Allow Administration** check box as required.The setting of a user's **Allow Administration** privilege controls which administration tasks the user can perform. For more information, see "[How to specify the tasks a user or role \(responsibility\) can perform](#)".
6. Click OK to save the changes you have made and close the Security dialog.

## Notes

- To remove access to a business area from a user or role, move the business area from the **Selected business areas** list to the **Available business areas** list.
- The **Users/Roles** drop down list includes a role called PUBLIC. Select this role to view or edit the default access permissions for users or roles whose permissions you have not yet defined.
- If you are running Discoverer Administrator as an Oracle Applications user, the Security dialog shows Oracle Applications Responsibilities instead of roles. For more information about Applications mode, see [Chapter 17, "What features does Discoverer support for Oracle Applications users?"](#).

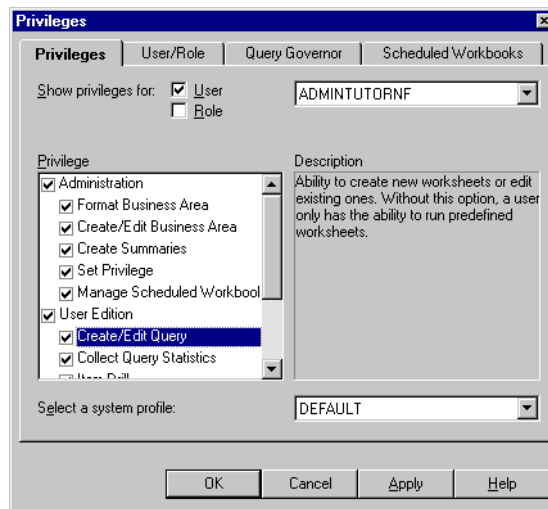
## How to specify the tasks a user or role (responsibility) can perform

**Note:** When Oracle Applications database users are connected, Discoverer displays responsibilities instead of roles.

To specify the tasks a user or role can perform:

1. Choose Tools | Privileges and display the "[Privileges dialog: Privileges tab](#)".

**Figure 7–3 Privileges dialog: Privileges tab**



2. Specify the content of the **User/Role** drop down list by selecting the **User** check box and/or the **Role** check box as appropriate.

3. Select the user or role whose task privileges you want to change from the **User/Role** drop down list.

4. Grant or revoke specific task privileges for the user or role by selecting or clearing the appropriate check boxes in the **Privilege** list.

**Note:** To grant a child privilege (shown indented in the list), you must first grant the corresponding parent privilege (the first non-indented privilege above the child privilege). If the user has access to the User Edition via a responsibility, then the selected minor privileges for that user will still be active (although they appear grayed out), even though the major privilege has been unchecked. The total child privileges for a user are determined by the combination of responsibility and user privileges.

**Hint:** Move the cursor over a privilege in the **Privilege** list to see a brief description of that privilege in the right-hand side of the dialog.

5. Select a system profile to apply to the user or role from the **Select a system profile** drop down list (only available if you are using an Oracle database).

System profiles are created by the database administrator to control access to database resources.

**Note:** To assign system profiles within Discoverer Administrator you must have access to the following database views:

- DBA\_PROFILES
- DBA\_USERS

6. Click OK to save the changes you have made and close the Privileges dialog.

### Notes

- The changes you have made will take effect when users re-connect to Discoverer.
- The drop down list for user/role includes a role called PUBLIC. Select this role to view or edit the default task privileges for users or roles whose privileges you have not yet defined.
- If you want to grant Administration privileges to a user or role, you must also grant that user Administration access to the business area. For more information, see "[How to specify a user or role \(responsibility\) to perform a specific task](#)".
- If you are running Discoverer Administrator as an Oracle Applications user, the Privileges dialog shows Oracle Applications Responsibilities instead of roles.



For more information about Oracle Applications mode, see [Chapter 17, "What features does Discoverer support for Oracle Applications users?"](#).

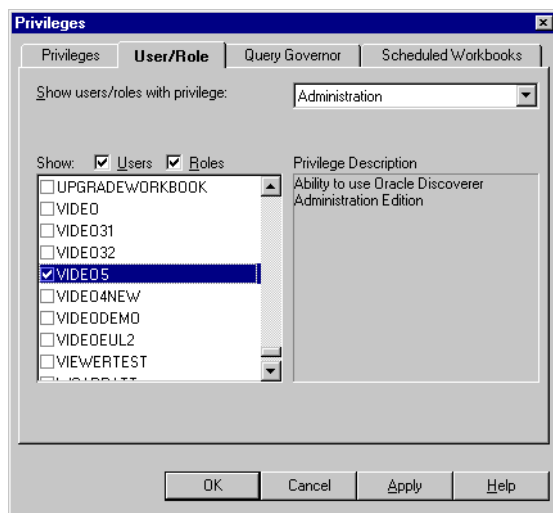
## How to specify a user or role (responsibility) to perform a specific task

**Note:** When Oracle Applications database users are connected, Discoverer displays responsibilities instead of roles.

To specify the users or roles that can perform a specific task:

1. Choose Tools | Privileges and display the "Privileges dialog: User/Role tab".

**Figure 7-4 Privileges dialog: User/Role tab**



2. Select the task privilege that you want to grant to (or revoke from) users or roles from the drop down list.

When you select a privilege from the drop down list, a brief description of the privilege appears on the right-hand side of the dialog.

3. Specify the content of the **Users/Roles** list by selecting the **Users** check box and/or the **Roles** check box as appropriate.

The content of the **Users/Roles** list is sorted alphabetically. If you include both users and roles, users appear first.

4. Grant or revoke privileges for the currently selected task by selecting or clearing the appropriate check boxes in the **Users/Roles** list.
5. Click OK to save the changes you have made and close the Privileges dialog.

### Notes

- The changes you have made will take effect when users re-connect to Discoverer.
- If you want to grant (or deny) administration privileges to a user or role, you must also grant (or deny) that user administration access to the business area. For more information, see ["How to specify a user or role \(responsibility\) that can access a business area"](#).
- If you are running Discoverer Administrator as an Oracle Applications user, the Privileges dialog shows Oracle Applications Responsibilities instead of roles. For more information about Oracle Applications mode, see [Chapter 17, "What features does Discoverer support for Oracle Applications users?"](#).

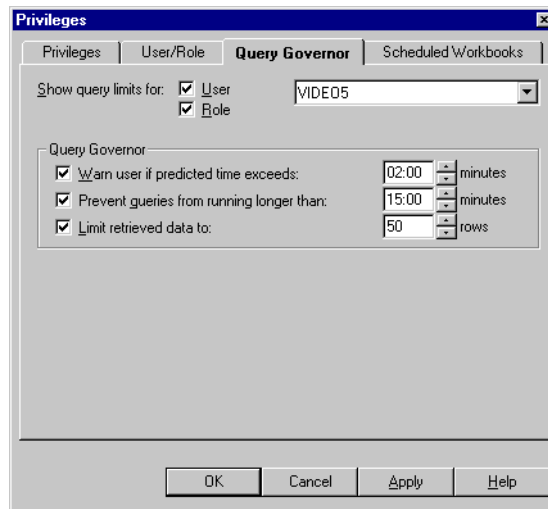
## How to set query retrieval limits

You can maintain overall system performance by setting query limits for users and roles.

**Note:** When Oracle Applications database users are connected, Discoverer displays responsibilities instead of roles.

To set query retrieval limits for a user or role:

1. Choose Tools | Privileges and display the ["Privileges dialog: Query Governor tab"](#).

**Figure 7–5 Privileges dialog: Query Governor tab**

2. Specify the content of the **User/Role** drop down list by selecting the **User** check box and/or the **Role** check box as appropriate.

The **Role** check box is only available if you are using an Oracle database.

3. Select the user or role for which you want to specify a query limit from the **User/Role** drop down list.
4. Specify the following Query Governor options as required:

Option	Use to:
Warn user if predicted time exceeds:	issue a warning if the estimated time to perform a query exceeds the limit you specify (note that this feature is not available when using ODBC)
Prevent queries from running longer than:	stop queries that have been running for longer than the limit you specify
Limit retrieved data to:	restrict the number of rows a query can retrieve to the limit you specify

5. Click OK to save the changes you have made and close the Privileges dialog.

## Notes

- To find out how Discoverer estimates the time a query will take to run and the number of rows the query will retrieve, see [Chapter 20, "About predicting query performance"](#).
- Where Discoverer estimates that a query will take longer to run than the limit you set, you can specify that the user must run the query as a scheduled workbook using options on the "[Privileges dialog: Scheduled Workbooks tab](#)".
- If you are running Discoverer Administrator as an Oracle Applications user, the Privileges dialog shows Oracle Applications Responsibilities instead of roles. For more information about Oracle Applications mode, see [Chapter 17, "What features does Discoverer support for Oracle Applications users?"](#).

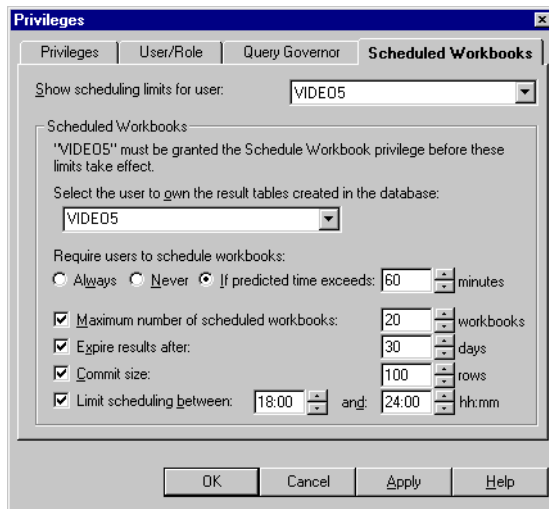
## How to set scheduled workbook limits

You can control how a Discoverer end user makes use of scheduled workbooks by setting scheduled workbook limits.

To set scheduled workbook limits for a user or role:

1. Choose Tools | Privileges and display the "[Privileges dialog: Scheduled Workbooks tab](#)".

**Figure 7–6** *Privileges dialog: Scheduled Workbooks tab*



2. Select the user for which you want to specify scheduled workbook privileges from the **Show scheduling limits for user** drop down list.
3. Select the user to own the result tables created in the database (that contain the results of scheduled workbooks).

The results of scheduled workbooks are stored in database tables. These tables can belong to a different user to the one that originally ran the scheduled workbook.

4. Specify when you want to force the user to schedule workbooks as follows:

Option	Use to specify that:
Always	the user must always schedule workbooks
Never	the user is never forced to schedule queries (i.e. the user can choose whether to run queries online or schedule them)
If predicted time exceeds	the user has to schedule a query that exceeds the predicted time that you specify

5. Set the following Scheduled Workbook options as required:

Option	Use to:
Maximum number of scheduled workbooks	restrict the scheduled workbooks that the user can maintain at one time to the number you specify  This option enables you to prevent users from submitting so many scheduled workbooks that no other jobs on the DBMS_JOB queue can run.
Expire results after	limit the lifetime of results from the user's scheduled workbooks to the number of days you specify (the results are deleted at the end of the user's Discoverer session)
Commit size	limit on the number of rows written to the results table  For example, if 1000 rows need to be written and the Commit size is 100, 10 writes are performed.  Note that on large result sets, you can improve server performance by setting the Commit size higher than the default (although little gain will be achieved by setting the Commit size higher than 1000).
Limit scheduling between	specify the times between which the user can schedule workbooks to run

6. Click OK to save the changes you have made and close the Privileges dialog.

### **Notes**

You might decide to have a single database user owning the tables containing the results of all users' scheduled workbooks (with the benefit that individual users do not need additional privileges to run scheduled workbooks). Alternatively, you might decide to have a scheduled workbook results schema owning the tables containing the results for each user's scheduled workbooks (with the benefit that space quota is not shared and is therefore less likely to be exhausted than if the tables were owned by a single database user). For more information, see [Chapter 8, "Where to store the results of scheduled workbooks?"](#).

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# Scheduling workbooks

## Scheduling workbooks

This chapter explains how to enable users to schedule workbooks and contains the following topics:

- "What are workbooks and scheduled workbooks?"
- "Why schedule workbooks?"
- "What happens when an end user schedules a workbook?"
- "What Oracle database features support workbook scheduling?"
- "Where to store the results of scheduled workbooks?"
- "What are the prerequisites for scheduling workbooks?"
- "How to confirm that the DBMS\_JOB package is installed"
- "How to specify the owner of the tables containing scheduled workbooks results"
- "How to control the frequency that the server checks for new scheduled jobs"
- "How to view and manage scheduled workbooks"
- "About scheduled workbooks and compatibility between the current version of Discoverer and previous releases"

## What are workbooks and scheduled workbooks?

A workbook is a collection of Discoverer worksheets. Workbooks are essentially documents containing query definitions. Discoverer end users can store their

workbooks centrally in the database. In the Discoverer Desktop, users can also store workbooks on their own PC or on a network file server.

A scheduled workbook is a workbook that has been set by the user to run automatically at a particular date, time, and frequency. Scheduled workbooks are placed on a process queue on the database server. End users can schedule workbooks using Discoverer Plus and Desktop. As the Discoverer manager, you can use Discoverer Administrator to monitor and maintain scheduled workbooks.

Note the following:

- Users can run workbooks in the background using the Discoverer command line options (Desktop only). Such workbooks are not scheduled workbooks.
- Scheduled workbooks, scheduling information and the results of scheduled workbooks are not exported when you export a business area.
- If the objects of the EUL used by a scheduled workbook changed between the time when the workbook is scheduled and the time when the result set is displayed, the scheduled workbook's status is set to indicate that the EUL has changed.

## Why schedule workbooks?

From a Discoverer end user's point of view, the ability to schedule workbooks is useful for:

- reports that take a long time to run
- reports that have to run at regular intervals

For example, a Discoverer end user might want to run a report that they know will take a long time to complete. The user can schedule the report to run overnight and have the results ready to view the next morning.

From a Discoverer manager's point of view, workbook scheduling is useful to prevent long-running queries from adversely affecting system performance. You can force users to schedule workbooks (either all workbooks, or only those workbooks that will exceed a predicted time that you specify), and you can further specify the time periods that scheduled workbooks are permitted to run.



## What happens when an end user schedules a workbook?

The table below shows what happens when an end user schedules a workbook in Discoverer Plus.

	Action	Notes
1.	User selects worksheet (or worksheets) to include in scheduled workbook	
2.	User specifies date, time, and frequency at which scheduled workbook is to run	
3.	Discoverer Plus confirms that scheduling the workbook does not exceed user's limit on number of scheduled workbooks	<p>The limit on the number of scheduled workbooks restricts the number of scheduled workbooks that can be maintained at any one time. As the Discoverer manager, you specify this limit on the <a href="#">"Privileges dialog: Scheduled Workbooks tab"</a>. If the user exceeds their limit, Discoverer Plus displays a message and the workbook is not scheduled.</p> <p>The <code>job_queue_processes</code> value controls the maximum number of jobs that can be run at any one time on the server. For more information, see <a href="#">"What Oracle database features support workbook scheduling?"</a>.</p> <p>You can also limit on the number of scheduled workbooks is not the same as the <code>job_queue_processes</code> value in the Oracle initialization file.</p>
4.	Discoverer adds scheduled workbook to DBMS_JOB within Oracle database kernel	
5.	Periodically, the job queue process is activated and the next job in the queue is run	The scheduled workbook is processed entirely on the server. You use the <code>job_queue_interval</code> value in the Oracle database initialization file to specify the length of time that the job queue process is inactive. For more information, see <a href="#">"How to control the frequency that the server checks for new scheduled jobs"</a> .
6.	A database table is created and populated with the output or result set of the scheduled workbook	The result set is stored under the schema specified by the Discoverer manager. For more information, see <a href="#">"Where to store the results of scheduled workbooks?"</a> .
7.	User can view scheduled workbook	
8.	User can delete result set when no longer required - at which point the table is dropped	As the Discoverer manager, you can specify how long the results of a user's scheduled workbook can remain in the database before being automatically deleted (see <a href="#">"Privileges dialog: Scheduled Workbooks tab"</a> ).

## What Oracle database features support workbook scheduling?

Discoverer takes advantage of native scheduling functionality in the Oracle database to schedule workbooks. Specifically, Discoverer makes use of the DBMS\_JOB package.

You control the processing of the DBMS\_JOB package using the following parameters in the Oracle database initialization file (the INIT<SID>.ORA file).

Parameter in INIT<SID>.ORA	Use to:
job_queue_processes	<p>Use this parameter to specify the number of concurrent processing requests that can be used to process DBMS_JOB. The default value is zero, which means processing requests will not be created. If you want to have ten processing requests to be handled simultaneously, set this parameter to 10.</p> <p>If any other applications use DBMS_JOB, set this parameter to at least 2.</p> <p><b>Hint:</b> You need more than one job queue process because a job that fails (for any reason) might continue to be re-submitted and prevent any other jobs in the queue from being submitted.</p>
job_queue_interval	<p>Use this parameter to specify the time frequency (in seconds) after which job processes are started to process pending jobs. The default is 60 seconds, which means that every 60 seconds the job processes start to serve processing requests. What you set this parameter to depends on how frequently you want the process to start up and serve the requests that have been made. Oracle recommends that you set this parameter to at least 600 seconds (i.e. 10 minutes). Note that this parameter also affects the Discoverer summary management feature (for more information about summary folders, see <a href="#">Chapter 14, "Managing summary folders"</a>).</p>

For more information about setting the parameters in the INIT<SID>.ORA file, see "[How to control the frequency that the server checks for new scheduled jobs](#)".

Note that workbook scheduling is only available when running against an Oracle database because both DBMS\_JOB and the INIT<SID>.ORA file are only available with Oracle databases.

## Where to store the results of scheduled workbooks?

Discoverer stores the results of scheduled workbooks in database tables. Before an end user can schedule a workbook, you must decide which database user (schema) is to own those tables. You have two choices as described in the table below:

Owner	Notes
the schema running the scheduled workbook	<p>The advantage of specifying the result set storage in the end user's schema is that a database limit can be specified on the maximum amount of data an end user can store in the database. If the result set is stored under the end user's schema, you keep control over the maximum amount of space one individual end user can fill with result sets. If the end user creates a scheduled workbook that fills the space, only that end user's schema is affected.</p> <p>A disadvantage is that it increases the maintenance overhead.</p> <p><b>Note:</b> Since Oracle Applications users often share the same secure database account, they are advised to create a scheduled workbook results schema to store the results of scheduled workbooks.</p>
scheduled workbook results schema	<p>The advantage of specifying the result set storage in a scheduled workbook results schema is that it is generally easier to manage than using multiple database user schemas. Also each end user does not need to set up additional database privileges to run scheduled workbooks.</p> <p>The disadvantage is that space quota is shared and so could be exhausted by a single end user.</p>

For more information about how to specify where the results of scheduled workbooks are stored, see ["How to specify the owner of the tables containing scheduled workbooks results"](#).

## What are the prerequisites for scheduling workbooks?

Before an end user can schedule a workbook, you must:

- configure the database to enable the scheduled workbooks feature by:
  - confirming that the DBMS\_JOB package is already installed on the database and installing the package if it is not already installed (for more information, see ["How to confirm that the DBMS\\_JOB package is installed"](#))
  - specifying the database user that will own the tables containing the results of scheduled workbooks (for more information, see ["How to specify the owner of the tables containing scheduled workbooks results"](#))
  - setting the frequency of scheduled workbook processing (for more information, see ["How to control the frequency that the server checks for new scheduled jobs"](#))

- grant the Schedule Workbooks privilege to the database user (for more information, see [Chapter 7, "How to specify the tasks a user or role \(responsibility\) can perform"](#))

## How to confirm that the DBMS\_JOB package is installed

Before an end user can schedule a workbook, the DBMS\_JOB package must have already been installed on the database. If the DBMS\_JOB package has not yet been installed, you must install it.

To confirm that the DBMS\_JOB package is installed:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> select * from all_objects where object_name='DBMS_JOB' and  
object_type = 'PACKAGE';
```

If the above statement returns one or more rows, the DBMS\_JOB package is already installed on the database.

If the above statement returns no rows, the DBMS\_JOB package has not yet been installed. You must install the DBMS\_JOB package before users can schedule workbooks.

To install the DBMS\_JOB package if it is not yet installed, for Oracle9i databases:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> CONNECT username/password@database AS SYSDBA;
```

3. Type the following at the command prompt:

```
SQL> start <ORACLE_HOME>/rdbms/admin/dbmsjob.sql;
```

4. Type the following at the command prompt:

```
SQL> start <ORACLE_HOME>/rdbms/admin/prvtjob.plb;
```

To install the DBMS\_JOB package if it is not yet installed, for Oracle databases earlier than Oracle9i:

1. Choose Run from the Windows Start menu (on the database machine).

2. Type one of the following at the command prompt to start the appropriate version of the DBA utility:

Version of Oracle:	Type the following:
Oracle 8.0 and above	SVRMGRL
Oracle8i Personal Edition	SVRMGR

3. Log on to the DBA utility as the database administrator.
4. Type the following at the command prompt:

```
SVRMGRL> connect internal
```

5. Type the following at the command prompt:

```
SVRMGRL> start <ORACLE_HOME>/rdbms/admin/dbmsjob.sql;
```

6. Type the following at the command prompt:

```
SVRMGRL> start <ORACLE_HOME>/rdbms/admin/prvtjob.plb;
```

### Notes

In some operating systems, the RDBMS directory is suffixed with the version number (e.g. RDBMS73).

## How to specify the owner of the tables containing scheduled workbooks results

The results of scheduled workbooks are stored in database tables. Discoverer's default behavior is to store scheduled workbooks in the EUL owners schema. Before an end user schedules a workbook, you must decide which database user is to own those tables. You have two choices:

- the database user running the scheduled workbook
- a scheduled workbook results schema

For more information about these two choices, see ["Where to store the results of scheduled workbooks?"](#)

Regardless of the choice you make, the database user that will own the tables containing scheduled workbook results must have certain database privileges.

### **Specify that the database user scheduling a workbook is to own the database tables containing the results of that workbook**

To specify a database user to own the database tables containing the results of that workbook:

1. Log on to SQL\*Plus as the database administrator.
2. Type the following at the command prompt:

```
SQL> grant CREATE PROCEDURE to <user name>;  
SQL> grant CREATE TABLE to <user name>;  
SQL> grant CREATE VIEW to <user name>;
```

where <user name> is the name of the database user that is to schedule workbooks.

Note that you must grant these privileges directly to the database user and not to a database role.

### **Use a script to specify a scheduled workbook results schema to own the scheduled workbook results tables (i.e. not the database user scheduling the workbook)**

To specify a scheduled workbook results schema to own the results tables of scheduled workbooks:

**Note:** You must know the user name and password of the EUL owner in order to run the script batchusr.sql.

1. Log on to SQL\*Plus as the database administrator.
2. Type the following at the command prompt:

```
SQL> start<ORACLE_HOME>\discv902\sql\batchusr.sql;
```

3. Enter the user name, password and database connection details for the scheduled workbook results schema being created by the script batchusr.sql.
4. (optional) Change the tablespace settings for the scheduled workbook results schema.

**Note:** Ask your database administrator if you are unsure about these settings.

5. Enter the EUL owner user name for the EUL that the scheduled workbook results schema will have access to.

**Note:** The script creates a scheduled workbook results schema and grants the following database privileges:

- CREATE PROCEDURE
- CREATE TABLE
- CREATE VIEW
- SELECT ANY TABLE

The scheduled workbook results schema created by the batchusr.sql script is granted the SELECT ANY TABLE database privilege to enable access to the underlying data needed for workbook scheduling. Without this grant, this database user's access to the underlying data might be limited.

If you do not want the scheduled workbook results schema to have the SELECT ANY TABLE database privilege on the underlying data, you must revoke the privilege manually.

6. Connect to Discoverer Administrator as the EUL owner that you used in the previous step (when running the script batchusr.sql).
7. In Discoverer Administrator select Tools | Privileges and display the "[Privileges dialog: Scheduled Workbooks tab](#)".

You must use Discoverer Administrator to choose the database user that will own the scheduled workbook result tables created in the database.

8. Use the **Show scheduling limits for user** drop down list to select the EUL owner.
9. Use the **Select the user to own the results created in the database:** drop down list to select the scheduled workbook results schema that you created in the script batchusr.sql.
10. Click OK.

You have used the script batchusr.sql to create a scheduled workbook results schema and then used the Privileges dialog to select the scheduled workbook results schema to be used for the EUL owner.

For more information about scheduled workbook privileges, see [Chapter 7, "How to set scheduled workbook limits"](#).

## Notes

- The scheduled workbook results schema created by the script batchusr.sql can only have access to one EUL.
- Be aware that a Discoverer end user could run a scheduled workbook that fills the available result set space. Other database users would not be able to run scheduled workbooks until it is cleared.
- The scheduled workbook results schema created by the batchusr.sql script will not be able to directly schedule a workbook using Discoverer Plus.

## How to control the frequency that the server checks for new scheduled jobs

You use the following two parameters in the INIT<SID>.ORA file to control scheduled workbook processing:

- job\_queue\_processes
- job\_queue\_interval

For more information about these parameters, see ["What Oracle database features support workbook scheduling?"](#).

To control the frequency of scheduled workbook processing:

1. Locate the INIT<SID>.ORA file.

The INIT<SID>.ORA file is held in <ORACLE\_HOME>\database. The default name of the file is INITORCL.ORA, where ORCL is the <SID> name.

2. Add the following two lines to the INIT<SID>.ORA file:

```
job_queue_processes = <a_value>
job_queue_interval = <a_value_in_seconds>
```

where:

- <a\_value> is the number of concurrent processing requests that can be used to process DBMS\_JOB (if other applications use DBMS\_JOB, we recommend you set this parameter to at least 2)
- <a\_value\_in\_seconds> is the time frequency (in seconds) after which job processes are started to process pending jobs (we recommend you set this parameter to at least 600 seconds)

For example, you might add the following two lines to the INIT<SID>.ORA file:



```
job_queue_processes = 2  
job_queue_interval = 600
```

### Notes

Discoverer's summary management feature and workbook scheduling feature both use the Oracle database's native scheduling capability. The values you specify for `job_queue_processes` and `job_queue_interval` will affect both features.

The database must be stopped and re-started for these changes to take effect.

## How to view and manage scheduled workbooks

As the Discoverer manager, you will want to monitor the status of currently scheduled workbooks, as well as:

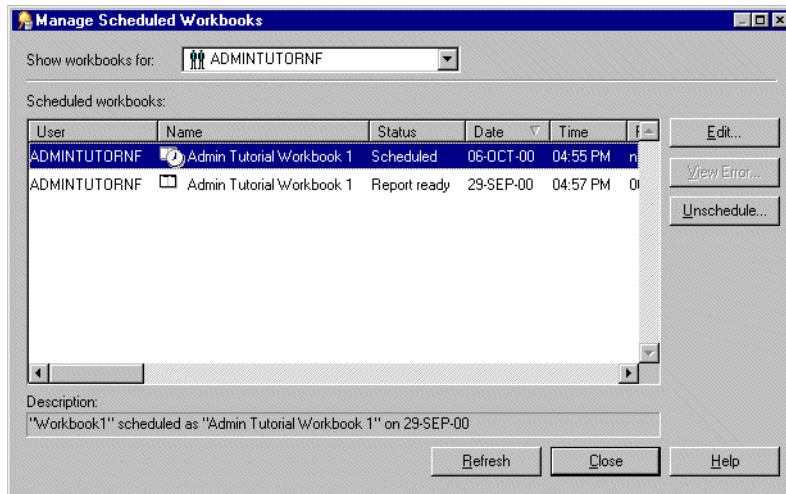
- view error messages for scheduled workbooks that have not run successfully
- delete scheduled workbook results from the database
- remove scheduled workbooks from the process queue
- edit scheduled workbook settings

**Note:** If you have an Oracle Applications mode EUL you must login as the EUL owner to view and manage scheduled workbooks.

To view and manage a scheduled workbook:

1. Choose Tools | Manage Scheduled Workbooks to display the "[Manage Scheduled Workbooks dialog](#)".

**Figure 8–1** *Manage Scheduled Workbooks dialog*



2. Select the user or role whose scheduled workbooks you want to display in the list from the **Show workbooks for** drop down list.

**Hints:** You can:

- show all scheduled workbooks by selecting **All Users** from the drop down list
  - sort the list using different columns by clicking the appropriate column heading
  - see a description (where one exists) of the currently selected scheduled workbook in the **Description** field.
3. (optional) To view an error message for a scheduled workbook that has not run successfully, select the scheduled workbook and click View Error.

The View Error button is only enabled for scheduled workbooks when the status is set to indicate that an error occurred while running the query.

4. (optional) To prevent a scheduled workbook from running by removing it from the process queue:
  - a. Select the scheduled workbook.
  - b. Click Unschedule.
  - c. Click Yes to confirm that you want to remove the scheduled workbook.

5. (optional) To delete the results of a scheduled workbook from the database (i.e. after the scheduled workbook has run), select the scheduled workbook and click Delete.
6. (optional) To edit a scheduled workbook scheduling information, select the workbook and click Edit... to display the Schedule Workbook dialog and:
  - use the "[Schedule Workbook dialog: Schedule tab](#)" to view the sheets included in the scheduled workbook, set the schedule time and repeat interval.
  - use the "[Schedule Workbooks dialog: General tab](#)" to view the name of the scheduled workbook, view and edit the description, choose whether to save just the latest results and set the interval after which results will automatically be deleted.
7. (optional) To see the effect of the changes you have made in the "[Manage Scheduled Workbooks dialog](#)", click Refresh.
8. Click Close to close the Manage Scheduled Workbooks dialog.

### Notes

- The Delete button only appears when you select a scheduled workbook that has run.
- If a scheduled workbook uses EUL objects that have changed between the time when the workbook is scheduled and the time when the result set is displayed, the scheduled workbook's status is set to EUL has changed.

## About scheduled workbooks and compatibility between the current version of Discoverer and previous releases

### **New version of batch PL/SQL package is installed into user's schema**

When you carry out an EUL upgrade to this version of Discoverer, a new version of the batch PL/SQL package is installed into the user's schema alongside the existing package. Preserving the existing PL/SQL package prevents any existing scheduled workbook batch jobs from being destroyed. Function names in the new batch PL/SQL package however, remain the same as the existing batch PL/SQL package.

### **Run script to specify that a scheduled workbook results schema is to own the results tables**

When you upgrade the EUL to this version of Discoverer and the following conditions are true:

- the database user that schedules a workbook does not own the database tables containing the workbook results
- you want a different database user (a scheduled workbook results schema) to own the database tables containing the workbook results

In this case you must install the new version of the batch PL/SQL package (EUL5\_BATCH\_USER) using the SQL script batchusr.sql. The script is located in the <ORACLE\_HOME>\discv902\sql directory. The new version of the batch PL/SQL package can be installed into the scheduled workbook results schema (i.e. the user's schema that owns the tables containing the workbook results). For more information, see ["Use a script to specify a scheduled workbook results schema to own the scheduled workbook results tables \(i.e. not the database user scheduling the workbook\)"](#).

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## Maintaining items and item classes

### Maintaining items and item classes

This chapter explains how to maintain items and item classes using Discoverer Administrator, and contains the following topics:

- "What are items?"
- "What are item classes?"
- "What are lists of values?"
- "About setting up lists of values"
- "What are alternative sorts?"
- "Examples of different ways to implement alternative sorts"
- "What is drill to detail?"
- "About setting up drill to detail"
- "What are date items?"
- "What are date format masks?"
- "About truncating date items and the EUL\_DATE\_TRUNC function"
- "About applying conditions to truncated date items"
- "About drilling out to other applications"
- "How to edit item properties"
- "How to create a LOV item class"
- "How to create an alternative sort item class"
- "How to create a drill to detail item class"

- ["How to create a list of values using a custom folder"](#)
- ["How to edit an item class"](#)
- ["How to add items to an item class"](#)
- ["How to remove items from an item class"](#)
- ["How to view the items that use an item class"](#)
- ["How to view the list of values for an item"](#)
- ["How to view the list of values for an item class"](#)
- ["How to delete items and item classes"](#)
- ["Notes about maintaining items and item classes"](#)

## What are items?

A Discoverer item is a representation in the End User Layer of one of the following:

- a column in a database table or view
- a component of a custom folder (for more information, see [Chapter 5, "What are custom folders?"](#))
- a calculation (for more information, see [Chapter 11, "What are calculated items?"](#))

Items are stored in folders and can be created, deleted and moved between folders. Items have properties that you can change (e.g. display name, formatting details). Items enable Discoverer end users to access and manipulate information until they find the information they want.

## What are item classes?

Item classes are groups of items that share some similar properties. An item class enables you to define item properties once, and then assign the item class to other items that share similar properties.

For example, assume the Product folder includes an item called Product Name that describes each product. A similar item also called Product Name may be required in the Sales Revenue folder. To enable both items to share common properties (e.g. a list of values), you might create one item class to define the properties, and apply it to both items. In other words, you only have to define the properties once. Without the item class, you would have to define the properties individually for each item.

Discoverer uses item classes to implement the following features:

- lists of values
- alternative sorts
- drill to detail links

As the Discoverer manager, it is your responsibility to create suitable item classes to support these Discoverer features. You can create a different item class for each feature or you can specify that Discoverer uses the same item class for more than one feature. Note that an item class to support an alternative sort must also support a list of values.

## What are lists of values?

A list of values (or 'LOV') is a set of valid values for an item. The values are those values in the database column on which the item is based. Discoverer end users use LOVs to display values or enter values in:

- parameters
- conditions
- the Discoverer item navigator
- the Export dialog

For example, assume that an item is based on a database column that contains the following values:

West
East
South
North
East
North
South

An LOV based on this item might contain five distinct values:

- West

- East
- South
- North

## About setting up lists of values

Discoverer uses item classes to implement LOVs. When you first create a business area, you can specify that LOVs are to be generated automatically (for more information, see "[Load Wizard: Step 4 dialog](#)"). Subsequently, you can use the Item Class Wizard to create new LOVs and assign existing LOVs to other items (for more information, see "[How to create a LOV item class](#)").

## What are alternative sorts?

An alternative sort is an instruction to Discoverer about how to sort the values in an item. Alternative sorts enable you to specify a different sort order to the one that Discoverer uses by default.

By default, Discoverer sorts items in ascending or descending order using ASCII values. However, Discoverer end users might require some items to be sorted in a different order.

For example, by default, Discoverer sorts a series of sales regions alphabetically (e.g. Central, East, North, South, West). But Discoverer end users might need sales regions sorted in a different order (e.g. North, South, East, West, Central).

To create an alternative sort order, you must use an item class to link together two items:

- an item to define the sort order
- an item to define the list of values to be sorted

Having defined the item class, you associate that item class with the item that Discoverer end users will include in their worksheets.

There are a number of ways to implement alternative sorts, including:

- using a custom folder (for more information, see "[Example 1: Using a custom folder to implement alternative sorts](#)")
- using a separate database table (for more information, see "[Example 2: Using a database table to implement alternative sorts](#)")



- using a calculated item and a DECODE statement (for more information, see ["Example 3: Using a calculated item and a DECODE statement to implement alternative sorts"](#))

Regardless of the way you choose to implement an alternative sort, note the following:

- the item class you use to implement an alternative sort must include both an alternative sort and a LOV
- the two items you select for the item class's alternative sort and LOV must be in the same folder

For information about how to create an alternative sort item class, see ["How to create an alternative sort item class"](#).

## Examples of different ways to implement alternative sorts

### Example 1: Using a custom folder to implement alternative sorts

You can use a custom folder to implement an alternative sort by using the folder's Custom SQL property to create two items. One item contains the list of values and the other item specifies the sort order. You can then create an item class and specify the two items in the custom folder as the item class's LOV and alternative sort respectively.

For example, you might want Discoverer end users to include an item called Ordered Regions in their worksheets. When users sort the values in this item, you want the order of the sales regions to be North, South, East, West (i.e. not the default alphabetical order). To implement this alternative sort using a custom folder, you might:

- create a custom folder called Sales Regions Sort Folder
- enter the following as the custom folder's Custom SQL property:

```
select 'North' region_name, 1 region_order from dual union
select 'South' region_name, 2 region_order from dual union
select 'East' region_name, 3 region_order from dual union
select 'West' region_name, 4 region_order from dual union
```

- create an item class called Sales Regions Customized Sort
- specify region\_name as the LOV item and region\_order as the alternative sort item for the Sales Regions Customized Sort item class

- specify Sales Regions Customized Sort as the item class associated with the Ordered Regions item that users will include in their worksheets
- when users sort a worksheet using the Ordered Regions item, the worksheet is sorted using the new order

## Example 2: Using a database table to implement alternative sorts

You can use a database table to implement an alternative sort by creating a new database table with two columns containing the values and their associated numerical order. If a suitable database table containing the values and their associated numerical order already exists, consider using that table. To avoid performance issues, avoid using a database table that contains more than one occurrence of each value.

Having loaded the table into the EUL as a folder, you can then create an item class and specify the two items for the item class's LOV and alternative sort respectively.

For example, you might want Discoverer end users to include an item called Ordered Regions in their worksheets. When users sort the values in this item, you want the order of the sales regions to be North, South, East, West (i.e. not the default alphabetical order). To implement this alternative sort using a database table:

- use SQL\*Plus to create a database table called SALES\_REGION\_SORT with two columns REGION\_NAME and REGION\_NUMBER by entering the following at the command prompt:

```
> create table SALES_REGION_SORT (REGION_NAME VARCHAR2(10), REGION_NUMBER NUMBER(2));
```

- use SQL\*Plus to insert values into the SALES\_REGION\_SORT table by entering the following at the command prompt:

```
> insert into SALES_REGION_SORT (REGION_NAME, REGION_NUMBER) values ('North', 1)
> insert into SALES_REGION_SORT (REGION_NAME, REGION_NUMBER) values ('South', 2)
> insert into SALES_REGION_SORT (REGION_NAME, REGION_NUMBER) values ('East', 3)
> insert into SALES_REGION_SORT (REGION_NAME, REGION_NUMBER) values ('West', 4)
```

- load the SALES\_REGION\_SORT database table into the EUL as a new folder containing the items Name and Number (for more information, see [Chapter 4, "Creating and maintaining business areas"](#))
- create an item class called Sales Regions Customized Sort
- specify the Name item as the LOV item and the Number item as the alternative sort item for the item class

- specify Sales Regions Customized Sort as the item class associated with the Ordered Regions item that users will include in their worksheets
- when users sort a worksheet using the Ordered Regions item, the worksheet is sorted using the new order

### Example 3: Using a calculated item and a DECODE statement to implement alternative sorts

You can use a calculated item with a DECODE statement to implement an alternative sort. You create two new items in an existing folder and specify the SQL statements for those items so that they contain the list of values and the sort order. You can then create an item class and specify the two items for the item class's LOV and alternative sort respectively.

If an item containing the list of values already exists in the folder, you can use that item.

For example, you might want Discoverer end users to include an item called Ordered Regions in their worksheets. When users sort the values in this item, you want the order of the sales regions to be North, South, East, West, Central (i.e. not the default alphabetical order). To implement this alternative sort using a calculated item and a DECODE statement:

- create a new calculated item called Sales Region Order in the folder that already contains the Ordered Regions item (the Ordered Regions item will provide the names of the regions)
- specify the following SQL statement as the formula for the item:  

```
DECODE(Ordered Regions, 'North', 1, 'South', 2, 'East', 3, 'West', 4, 5)
```
- create an item class called Sales Regions Customized Sort
- specify Sales Regions Customized Sort as the item class associated with the Ordered Regions item that users will include in their worksheets
- when users sort a worksheet using the Ordered Regions item, the worksheet is sorted using the new order

**Note:** In performance terms, this is the least efficient mechanism.

## What is drill to detail?

A drill to detail is a relationship between two or more items that might otherwise be unrelated. Drill to detail is achieved using an item class and gives Discoverer end users direct access to detail information about the currently selected row from other folders, without having to drill through hierarchical levels.

## About setting up drill to detail

When you create a drill to detail item class, you specify the items that use that item class. The folders containing the items that share the item class do not have to be joined.

When a user selects the drill to detail option for one item, any folders containing other items that share the same drill to detail item class are available for drilling. If the user selects one of those folders, the worksheet contains all the items in the selected folder and conditions are applied for all the item classes that it has in common with the original sheet.

Note that for a hyperdrill to work, items that share the same drill to detail item class must have the same data type.

## What are date items?

Date items are items that users include in worksheets to show date information.

Date items can be:

- items that are based on database columns with a date datatype
- calculated items that you have created
- items that Discoverer creates automatically when you specify a date hierarchy for a date item

## What are date format masks?

A date format mask is an instruction about how to display date information.

The table below shows how a number of dates are stored in the database, and the affect of applying different date format masks to those dates.

Stored in the database:	DD-MM-YYYY	DD-MONTH	MM/DD	DD-Month-YY HH:MI AM
04-JUN-1999 13:03:45	04-06-1999	04-JUNE	06/04	04-June-99 1:03 PM
05-AUG-2000 23:14:12	05-08-2000	05-AUGUST	08/05	05-August-00 11:14 PM
15-JAN-2001 03:45:38	15-01-2001	15-JANUARY	01/15	15-January-01 3:45 PM
14-APR-2002 09:52:26	14-04-2002	14-APRIL	04/14	14-April-02 9:52 AM

As the Discoverer manager, you can specify a default date format mask for date items that users include in their worksheets.

Note that date format masks have no effect on the way the date is stored in the database.

When you create a new level in a date hierarchy template, you specify a date format for the new level. If you include that new level in the date hierarchy, Discoverer automatically creates a new date item in any folders with date items that use that date hierarchy.

The formula of the new date item is:

`EUL_DATE_TRUNC(item_name, format_mask)`

where:

- `EUL_DATE_TRUNC` is a Discoverer function to truncate dates to the format specified by `format_mask`
- `item_name` is the name of the item in the folder that uses the date hierarchy
- `format_mask` is the date format you specified for the new level in the date hierarchy template

The date format you specified for the new level in the date hierarchy template is also used to set the Format Mask property of the new date item.

## About truncating date items and the EUL\_DATE\_TRUNC function

Truncating date items involves extracting and manipulating just one component of a date (e.g. the month, the quarter). Truncating date items is useful when comparing dates. Discoverer uses truncated date items to implement date hierarchies.

The `EUL_DATE_TRUNC` function truncates a date value to a specified date format mask. Using `EUL_DATE_TRUNC` has several benefits:

- it is easier to use `EUL_DATE_TRUNC` to truncate a date than the alternative method (which is to convert a date to a character string, remove part of the date, and then convert the character string back to a date)
- using `EUL_DATE_TRUNC` enables truncated dates to be sorted in correct chronological order (e.g. if the date format mask is `Q`, data for quarters is ordered within each year, and then by year)
- using `EUL_DATE_TRUNC` enables periods of time to be represented by a single date, which is useful when defining conditions

Discoverer uses `EUL_DATE_TRUNC` automatically when creating date hierarchies. You can also use `EUL_DATE_TRUNC` yourself when entering a formula for a date item.

Note that `EUL_DATE_TRUNC` returns the date at the start of the period. For example, if you apply `EUL_DATE_TRUNC(date,YYYY)` to the dates 25-aug-1934, 11-nov-1934 and 03-feb-1933, the result is 01-jan-1934, 01-jan-1934 and 01-jan-1933 respectively. In this example the first two dates produce the same value because this is what the format mask specifies.

## About applying conditions to truncated date items

You can include a truncated date item in a condition. The value you specify for the condition must be in the same format as the date format mask of the truncated date item. Note that if the date item is truncated using `EUL_DATE_TRUNC`, the value returned by `EUL_DATE_TRUNC` will always be displayed as the date at the start of the period.

Note the following:

- To reduce the risk of an item's date format mask being incompatible with the date format mask specified in the formula used to truncate the item, a warning is displayed whenever you attempt to change the date format mask of a date item that has an editable formula.
- The standard Oracle date format includes time (`DD-MON-YY:HH24:MI:SS`). When you load date items into the EUL, Discoverer gives them a default date format mask of `DD-MON-YYYY` (i.e. without the time). If time information is stored in a database column and a user applies a condition to a date item based on that column:
  - the time component is included in the condition (even though the default date format mask indicates that the time component is not included)

- no results will be returned

To resolve this situation, change the date item's formula to truncate dates to DD-MON-YYYY.

### Example 1

Assume the formula of a date item is `EUL_DATE_TRUNC(order_date,'YYYY')` and the item is included in a condition as `order_date='2001'`:

- the dates of all orders placed in 2001 will be returned by the item
- the date of each order will be shown as the date at the start of the period (i.e. 01-JAN-2001)

### Example 2

Assume you have used `EUL_DATE_TRUNC` to truncate a date item called `order_quarter_date`, and you want to include the `order_quarter_date` item in a condition. If the date format mask of the truncated item is 'Q', the formula of the item must use the same date format mask (i.e. `EUL_DATE_TRUNC(order_quarter_date,'Q')`).

## About drilling out to other applications

From a Discoverer perspective, a database column can contain data itself (e.g. regions, order numbers) or pointers to where data is located outside the database (e.g. names of files containing pictures of stores, URLs). You can set an item property to specify a pointer for Discoverer end users to drill to data outside the database.

To specify the location of the data of the column on which an item is based, use the item's Content Type property as follows (for more information, see "[Item Properties dialog](#)"):

- select NONE to specify that the column contains the data
- select FILE to specify that the column contains a pointer to information held outside the database (e.g. Microsoft Word documents, HTML pages)

When users include an item that has its Content Type property set to FILE, Discoverer displays the pointers contained in the column. If a user clicks the pointer, Discoverer launches the application associated with the pointer. For example:

- if the pointer is a filename, Discoverer launches the application associated with the filename extension and displays the specified file (e.g. if the filename extension is .doc, Discoverer launches Microsoft Word containing the specified file)

- if the pointer is a URL, Discoverer launches the user's web browser and displays the specified page

### Notes

If the datatype of the column is LONG RAW, the column can contain different kinds of data, including:

- BFILE data - Locators to large binary files stored outside the database. BFILE data enables byte stream I/O access to external LOBs residing on the database server. BFILE data has a maximum size of 4 gigabytes.
- BLOB data - Binary large objects. BLOB data has a maximum size of 4 gigabytes.
- CLOB data - Character large objects containing single-byte characters. Both fixed-width and variable-width character sets are supported, both using the CHAR database Data Type. CLOB data has a maximum size of 4 gigabytes.
- NCLOB data - Character large objects containing multibyte characters. Both fixed-width and variable-width character sets are supported, both using the NCHAR database Data Type. Stores national character set data. NCLOB data has a maximum size of 4 gigabytes.

If the datatype of the column on which an item is based is LONG RAW, Discoverer provides additional options for the item's Content Type property (i.e. options in addition to FILE and NONE). These options enable you to specify how Discoverer decides which application to launch to view the column's content. For example, if you select DOC as the item's Content Type property, Discoverer will launch the application associated with the .DOC extension (usually Microsoft Word).



## How to edit item properties

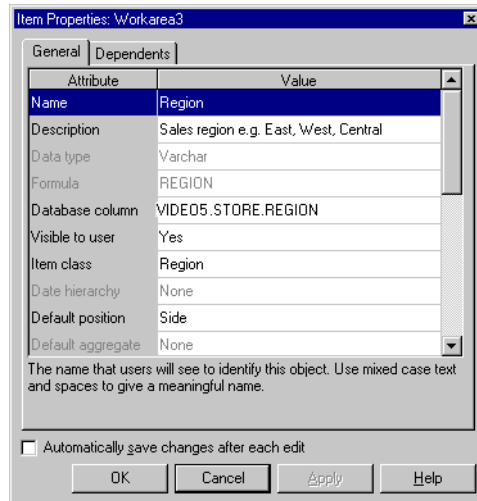
To edit item properties:

1. Click an item on the Data page and choose Edit | Properties to display the "Item Properties dialog".

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

**Note:** Where you select multiple items, all properties that are common to each of the selected items are displayed. If the data for a field is not common to each of the selected items, the field is blank.

**Figure 9–1** Item Properties dialog



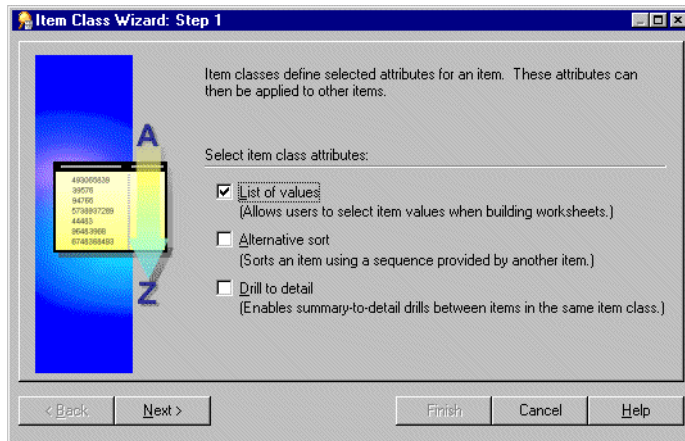
2. Make the required changes.
3. Click OK.

## How to create a LOV item class

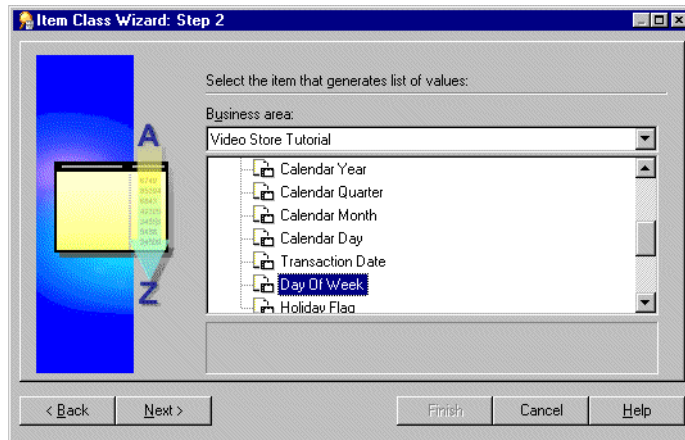
To create a LOV item class:

1. Choose Insert | Item Class to display the "Item Class Wizard dialog".  
If Discoverer displays the "Item Class Wizard: Step 2" press the <Back button.

**Figure 9–2** The Item Class Wizard dialog



2. Select the **List of Values** check box.
3. Click Next to display the "Item Class Wizard: Step 2".

**Figure 9–3 Item Class Wizard: Step 2 dialog**

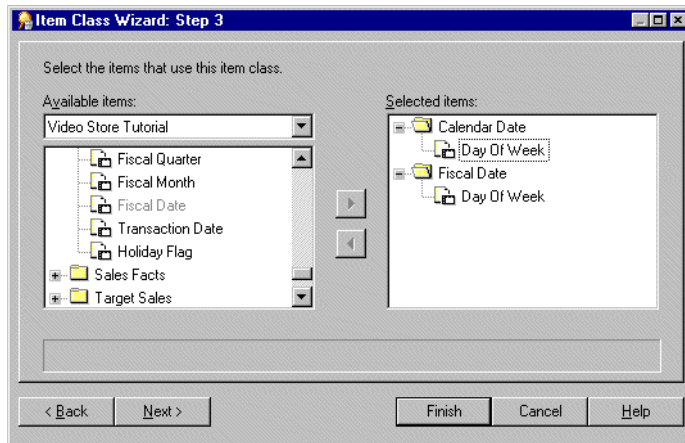
4. Select the business area that contains the item you want to use to generate the list of values.
5. Select the item that you want to use to generate the list of values.

**Note:** By default, Discoverer uses a `SELECT DISTINCT` query to retrieve a list of values. If you select an item in a folder with a large number of rows compared to the number of distinct values, then the query can be inefficient. It is more efficient to select an item from a smaller table (attached to the folder with a large number of rows) rather than using the large table itself. If a smaller table does not exist, it might be worth creating it to speed up the list of values process.

Alternatively if you have a small number of values, use a custom folder to create a local list of values within the End User Layer. For more information, see ["How to create a list of values using a custom folder"](#).

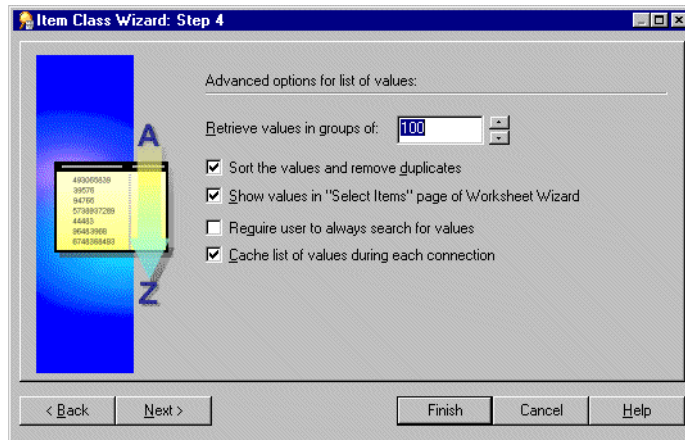
6. Click Next to display the **"Item Class Wizard: Step 3"** to select the items that use this item class.

**Figure 9–4** *Item Class Wizard: Step 3 dialog*

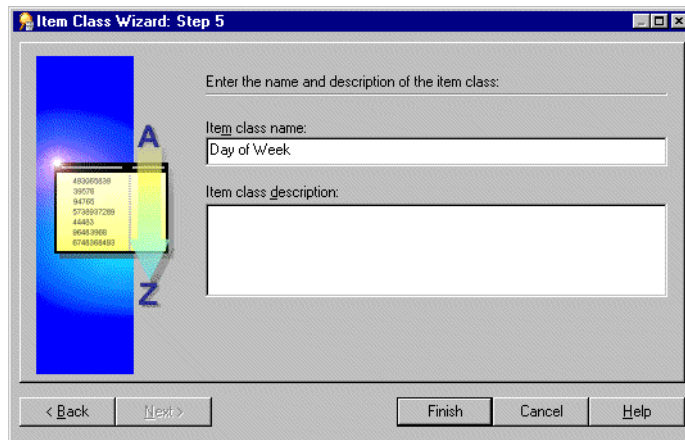


**Note:** If you had also selected the **Drill to detail** check box on the first page of the Item Class Wizard, end users will be able to drill between any of the items that you select on this page.

7. Move the items that use this item class, from the **Available items** list to the **Selected items** list.
8. Click Next to display the "Item Class Wizard: Step 4" to specify options controlling how LOVs are selected and displayed in Discoverer Plus.

**Figure 9–5 Item Class Wizard: Step 4 dialog**

9. Specify the number of values to retrieve in each group, and select other check boxes as required.
10. Click Next to display the **"Item Class Wizard: Step 5"** dialog and specify a name and description for the new item class.

**Figure 9–6 Item Class Wizard: Step 5 dialog**

11. Enter a name and description for your new item class.
12. Click Finish.

Discoverer creates a new List of Values item class.

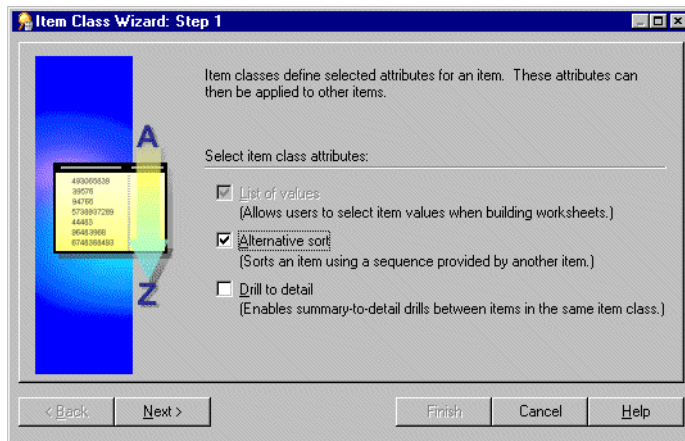
## How to create an alternative sort item class

An alternative sort item class enables you to sort a list of values based on an alternative sort sequence.

To create an alternative sort item class:

1. Choose Insert | Item Class to display the "Item Class Wizard dialog".

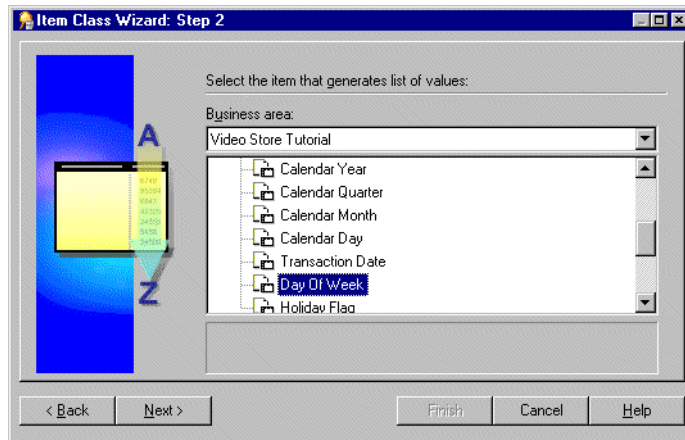
*Figure 9–7 The Item Class Wizard: Step 1 dialog*



2. Select the **Alternative sort** check box.

**Note:** If you select the **Alternative sort** check box, the **List of values** check box is automatically selected.

3. Click Next to display the "Item Class Wizard: Step 2" dialog.

**Figure 9–8** *Item Class Wizard: Step 2 dialog*

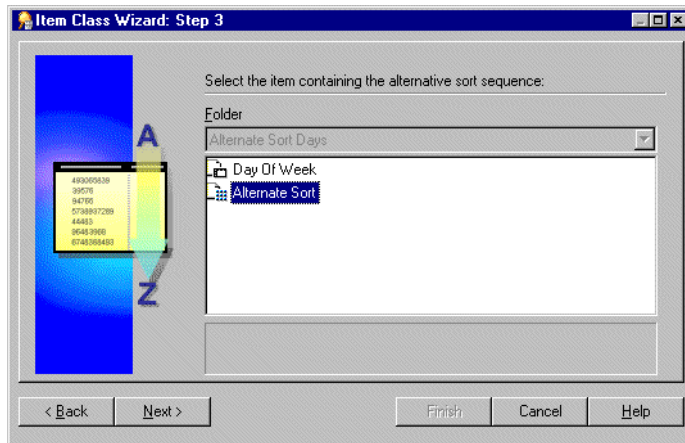
4. Select the business area that contains the item you want to use to generate the list of values.
5. Select the item that you want to use to generate the list of values.

**Note:** Discoverer uses a `SELECT DISTINCT` query to retrieve a list of values. If you select an item in a folder with a large number of rows compared to the number of distinct values, then the query can be inefficient. It is more efficient to select an item from a smaller table (attached to the folder with a large number of rows) rather than using the large table itself. If a smaller table does not exist, it might be worth creating it to speed up the list of values process.

Alternatively if you have a small number of values, use a custom folder to create a local list of values within the End User Layer. For more information, see ["How to create a list of values using a custom folder"](#).

6. Click Next to display the **"Item Class Wizard: Step 3"** dialog.

**Figure 9–9** *Item Class Wizard: Step 3 dialog*



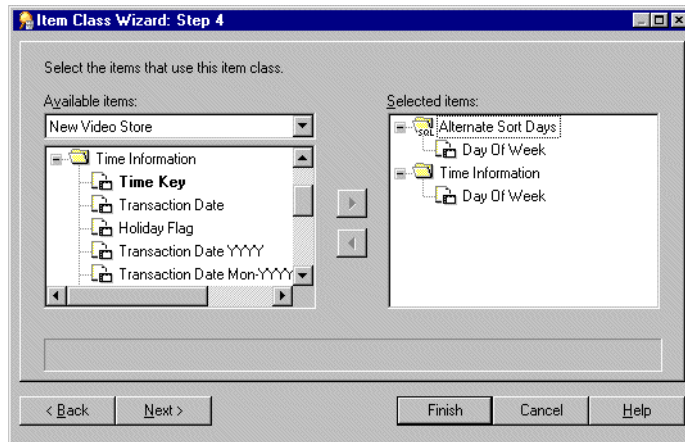
7. Select the item that contains the alternative sort sequence.

This item must:

- already exist in the database
  - be in the same folder as the item that generates the list of values
8. Click Next to display the "Item Class Wizard: Step 4" dialog.

**Hint:** Alternatively, if you have a small number of values, use a custom folder to create a local list of values containing an alternative sort order within the End User Layer see "[Example 1: Using a custom folder to implement alternative sorts](#)".

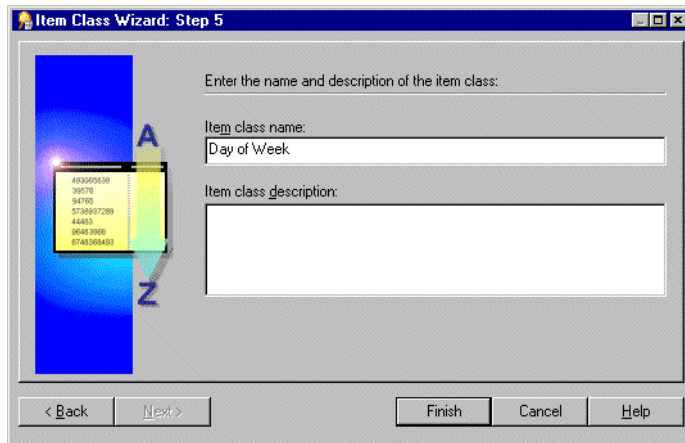


**Figure 9–10** *Item Class Wizard: Step 4 dialog*

**Note:** If you selected the **Drill to detail** check box on the first page of the Item Class Wizard, end users will be able to drill between any of the items that you select on this page.

9. Move the items that use this item class, from the **Available items** list to the **Selected items** list.
10. Click Next to display the **"Item Class Wizard: Step 5"** dialog.

**Figure 9–11** *Item Class Wizard: Step 5 dialog*

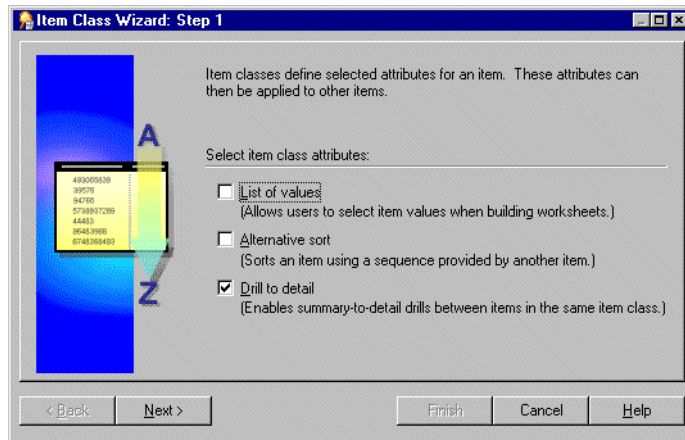


11. Enter a name and description for your new item class.
12. Click Finish.

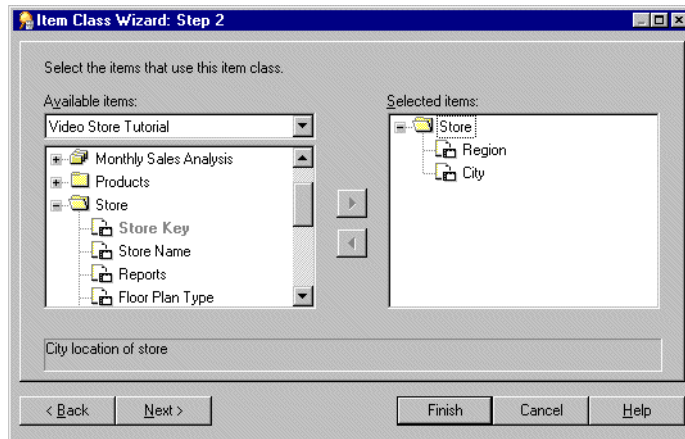
## How to create a drill to detail item class

To create a drill to detail item class:

1. Choose Insert | Item Class to display the "Item Class Wizard dialog".

**Figure 9–12 The Item Class Wizard: Step 1 dialog**

2. Select the Drill to detail check box.
3. Click Next to display the "Item Class Wizard: Step 2" dialog.

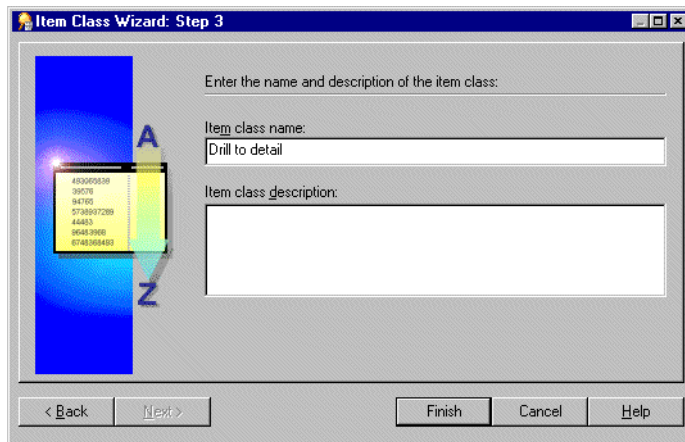
**Figure 9–13 Item Class Wizard: Step 2 dialog**

4. Move the items that use this item class, from the **Available items** list to the **Selected items** list.

**Note:** End users will be able to drill between any of the items that you select on this page.

5. Click Next to display the "Item Class Wizard: Step 3" dialog.

**Figure 9–14** Item Class Wizard: Step 3 dialog



6. Enter a name and description for your new item class.
7. Click Finish.

## How to create a list of values using a custom folder

This alternative method is useful if you have a small number of values. You can use a custom folder to create a local list of values within the End User Layer.

For example, if you want a list of values for North, South, East, and West, create a custom folder called Region\_lov and type in the SQL statements suggested below.

1. In the Data page of the Workarea, choose Insert | Folder | Custom to display the "Custom Folder dialog".
2. Enter the following SQL statements into the Custom Folder dialog:

```
SELECT 'NORTH' REGION FROM sys.dual
```

```
UNION
SELECT 'SOUTH' REGION FROM sys.dual
UNION
SELECT 'EAST' REGION FROM sys.dual
UNION
SELECT 'WEST' REGION FROM sys.dual
```

This query creates one item **Region**, that can now be used as a list of values which will help optimize performance.

For more information about custom folders, see [Chapter 5, "What are custom folders?"](#).

3. Click **Validate** to validate the SQL statement.
4. Click **OK**.

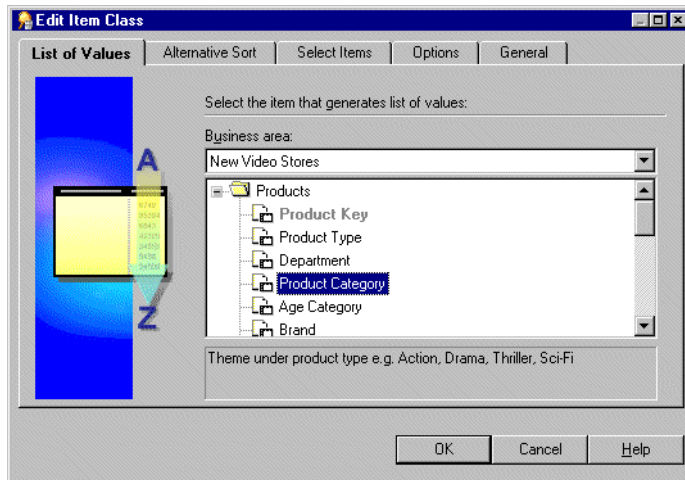
## How to edit an item class

To edit an existing item class:

1. In the "[Workarea: Item Classes tab](#)", click on the item class that you want to edit and choose **Edit | Edit...** to display the **Edit Item Class** dialog.

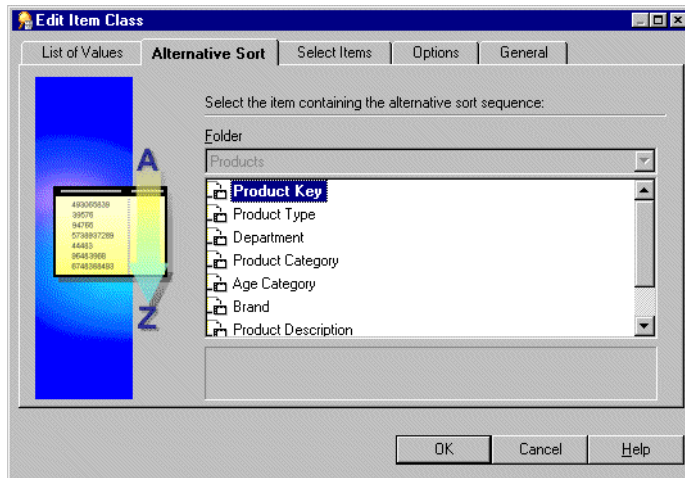
**Note:** The **Edit Item Class** dialog consists of five tabs. These resemble the pages in the **Item Class Wizard** and enable you to edit the settings you specified when you created the item class.

**Figure 9–15 Edit Item Class dialog: List of Values tab**



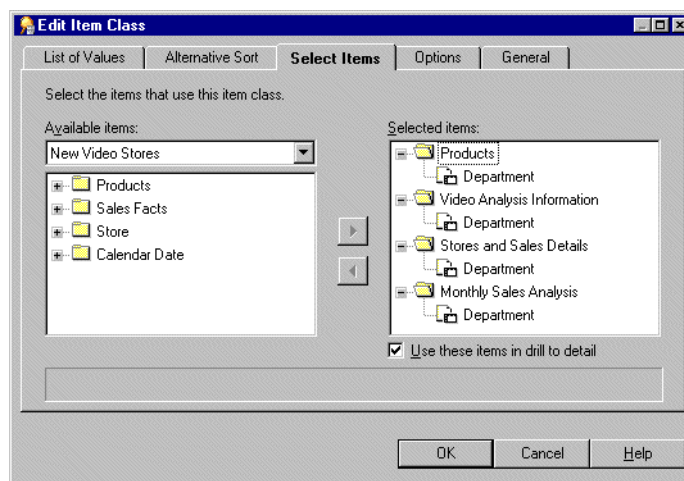
2. Display the "Edit Item Class: List of values tab" to change the list of values used in the selected item class.

**Figure 9–16 Edit Item Class dialog: Alternative Sort tab**



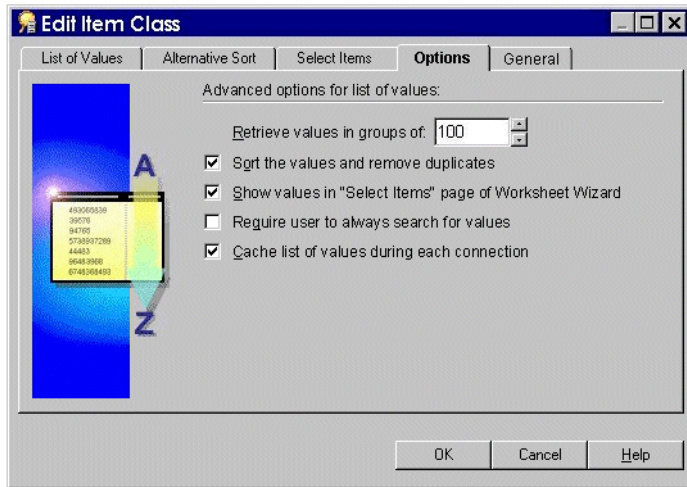
3. Display the "Edit Item Class: Alternative Sort tab" to change the alternative sort sequence assigned to the list of values for the selected item class.

**Figure 9–17** Edit Item Class dialog: Select Items tab



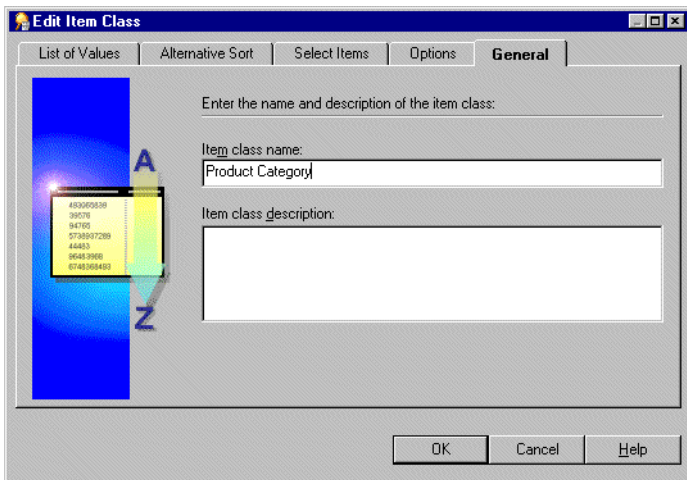
4. Display the "Edit Item Class: Select Items tab" to add or remove the items that use the selected item class.
5. Select the **Use these items in drill to detail** check box to enable drill to detail between the items that belong to this item class (otherwise, clear it).

**Figure 9–18 Edit Item Class dialog: Options tab**



6. Display the "Edit Item Class: Options tab" to set the advanced LOV options as required.

**Figure 9–19 Edit Item Class dialog: General tab**





7. Display the "[Edit Item Class: General tab](#)" to change the name and description of the selected item class.
8. Click OK.

## How to add items to an item class

Use one of the following methods to add items to an item class:

- "[How to add items to an item class using drag and drop](#)"
- "[How to add items to an item class using the Edit Item Class dialog](#)"
- "[How to add items to an item class using the Item Properties dialog](#)"

## How to add items to an item class using drag and drop

1. Choose Window | New Window to display a second Workarea.
2. Select the Data tab in one Workarea.
3. Display the Item Classes tab in the other Workarea.
4. Select the Item(s) that you want to add to an item class in the Data tab of the Workarea.
5. Drag the Items from the Data tab to the item class in the Item classes tab of the Workarea.
6. Close one of the Workarea windows.

## How to add items to an item class using the Edit Item Class dialog

1. In the "[Workarea: Item Classes tab](#)" click on the item class to edit and choose Edit | Edit.
2. Display the "[Edit Item Class: Select Items tab](#)".
3. Move the items from the **Available items** list to the **Selected items** list to add them to this item class.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

**Note:** The **Available items** drop down list enables you to select items from any open business area.

4. Click OK.

For more information see ["How to edit an item class"](#).

## How to add items to an item class using the Item Properties dialog

1. In the ["Workarea: Data tab"](#), select the item(s) to add to an item class.
2. Choose Edit | Properties to display the ["Item Properties dialog"](#).
3. Specify the item class for the selected item(s) to belong to using the Item class field.
4. Click OK.

For more information, see ["How to edit item properties"](#).

## How to remove items from an item class

Use one of the following methods to remove items from an item class:

- ["How to remove items from an item class using a popup menu"](#)
- ["How to remove items from an item class using the Edit Item Class dialog"](#)
- ["How to remove items from an item class using the Item Properties dialog"](#)

## How to remove items from an item class using a popup menu

1. Display the ["Workarea: Item Classes tab"](#).
2. Click the + symbol next to the item class you want to remove items from.
3. Click the + symbol to expand the **Items using this item class (with drill to detail)** object.
4. Select the items to remove from the item class.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

5. Right click one of the selected items and choose **Delete Item from Item Class** on the popup menu.
6. Discoverer Administrator displays the ["Confirm Delete dialog"](#).

For further information, see ["How to delete items and item classes"](#).

## How to remove items from an item class using the Edit Item Class dialog

1. Click the "[Workarea: Item Classes tab](#)".
2. Click the item class to edit and choose Edit | Edit...
3. Display the "[Edit Item Class: Select Items tab](#)".
4. Move the items you want to remove from this item class from the **Selected items** list to the **Available items** list.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

5. Click OK.

For more information, see "[How to edit an item class](#)".

## How to remove items from an item class using the Item Properties dialog

1. In the "[Workarea: Data tab](#)" select the item(s) to remove from an item class.
2. Choose Edit | Properties to display the "[Item Properties dialog](#)".
3. Specify None in the **Item class** field.
4. Click OK.

For more information, see "[How to edit item properties](#)".

## How to view the items that use an item class

To view the items that use a specific item class:

1. In the "[Workarea: Item Classes tab](#)", click the + symbol next to the item class that you want to expand.

This reveals two objects under the item class.

- List of values
  - Items using this item class (with drill to detail)
2. Click the + symbol next to **Items using this item class (with drill to detail)** to display the list of items that belong to this item class.

## How to view the list of values for an item

To view the list of values associated with an item:

1. In the "[Workarea: Data tab](#)" expand the item that has a list of values you want to view.

### Notes

- Discoverer may warn you that retrieving the list of values may take a long time. When you retrieve a list of values Discoverer submits a `SELECT DISTINCT` query to the database (which selects the distinct set of values for the item). If there is a large number of values in the database, retrieving the list can take some time. The End User Layer has a record of the length of time it takes to retrieve the values. If this length of time is greater than 15 seconds, Discoverer displays a warning. You can change this limit in Discoverer Plus under [Tools | Options | Query Governor](#).
- If the item you want to display a list of values for exists in more than one folder, choose the item in the folder that has the least number of rows. This will return the list of values in the shortest amount of time.

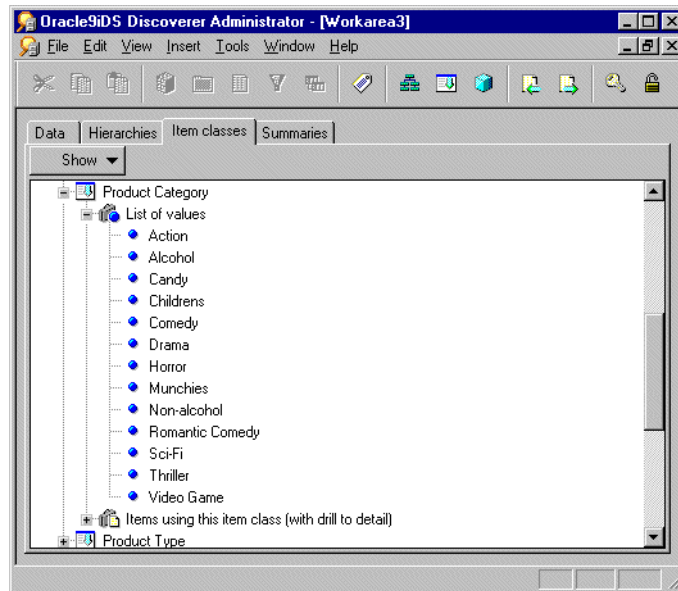
## How to view the list of values for an item class

To view the list of values associated with an item class:

1. Display the "[Workarea: Item Classes tab](#)".
2. Click the + symbol to expand the item class whose list of values you want to view.

This reveals two items under the item class:

- List of values
  - Items using this item class
3. Click the + symbol to expand the **List of values** object to display the list of values for the item class.

**Figure 9–20 Workarea: Item classes tab displaying a list of values**

## Notes

Discoverer may warn you that retrieving the list of values may take a long time. When you retrieve a list of values, Discoverer submits a `SELECT DISTINCT` query to the database (which selects the distinct set of values for the item). If there is a large number of values in the database, retrieving the list can take some time. The End User Layer has a record of the length of time it takes to retrieve the values. If this length of time is greater than 15 seconds, Discoverer displays a warning. You can change this limit in Discoverer Plus under Tools | Options | Query Governor.

## How to delete items and item classes

To delete items and item classes:

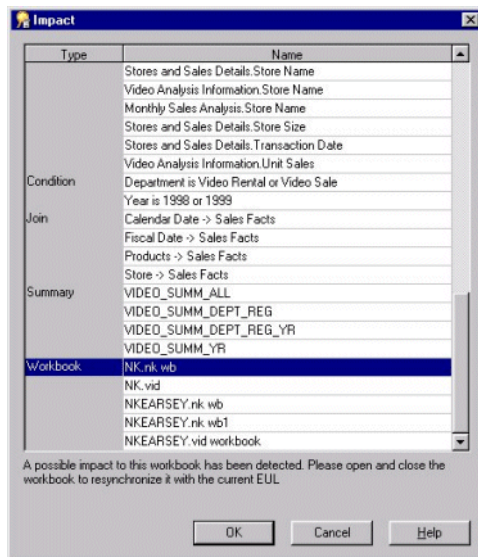
1. Select the item(s) or item class(es) to delete as follows:
  - select the items to delete from the "[Workarea: Data tab](#)"
  - select the item classes to delete from the "[Workarea: Item Classes tab](#)"

You can select more than one item or item class at a time by holding down the Ctrl key and clicking another one.

2. Choose Edit | Delete to open the "Confirm Delete dialog".
3. (optional) You can review the objects that might be affected by deleting the items or item classes you selected for deletion. To see the potential impact of the deletion:
  - a. Click Impact to display the "Impact dialog".
 

The Impact dialog shows other objects that might be affected by the deletion and helps you to make the right choice.
  - b. (optional) Select a row in the Impact dialog to view text indicating what affect the current action will have on the EUL object.

**Figure 9–21 The Impact dialog**



- c. Click OK when you have finished reviewing the impact that the deletion will have.
4. Click Yes to confirm you want to delete the selected item(s) or item class(es).

## Notes about maintaining items and item classes

### Notes about items based on columns with user-defined datatypes

When a table is created, a datatype must be specified for each of the columns in the table. Oracle provides a number of built-in datatypes (e.g. number, date, varchar2) as well as several categories for user-defined datatypes (e.g. object types, varrays, nested tables). User-defined datatypes are sometimes called abstract datatypes. User-defined datatypes use Oracle built-in datatypes and other user-defined datatypes as the building blocks of types that model the structure and behavior of data in applications.

Note that when you create a Discoverer folder based on a table using the Load Wizard, any columns that have user-defined datatypes are ignored (i.e. no items are created in the folder).

If you want to include an attribute of a user-defined datatype as an item in a Discoverer folder, you must do one of the following:

- create a custom folder and define a column with a built-in datatype in the folder's SQL statement to access the attribute of the user-defined datatype on which you want to base the item (for more information about creating custom folders, see [Chapter 5, "How to create custom folders"](#))
- create a database view, define a column with a built-in datatype in the view definition to access the attribute of the user-defined datatype on which you want to base the item, and specify the view as the object on which to base a simple folder when using the Load Wizard (for more information about using the Load Wizard, see [Chapter 5, "How to create simple folders from the database"](#))

To access the attributes of a user-defined datatype, you will have to be familiar with the appropriate syntax. For more information about user-defined datatypes and accessing their attributes, see the Oracle documentation supplied with your version of the database.





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## Creating and maintaining joins

### Creating and maintaining joins

This chapter explains how to implement joins using Discoverer Administrator, and contains the following topics:

- "What are joins?"
- "What are single item joins and multi item joins?"
- "About one-to-one join, one-to-many, and many-to-many joins"
- "How to create single item joins"
- "How to create multi-item joins"
- "How to edit join properties"
- "How to edit joins"
- "How to delete joins"
- "What is a fan trap?"
- "What to do if you set up a fan trap inside a complex folder"
- "What to do if you have a data type mismatch in a join"
- "How to create a new item that converts the Day of Week item from a varchar to a date data type"
- "How to create a join between two items that have the same data type"

## What are joins?

In Discoverer, a join relates two folders using one or more common items. In the database a join relates two tables using common columns.

A join between two folders enables you to include items from both folders when creating:

- a worksheet in Discoverer Plus
- a complex folder in Discoverer Administrator
- a hierarchy in Discoverer Administrator

When you select an item, you can only select another item from the same folder or from other folders joined to the first folder. If the second item you select comes from a different folder, you can subsequently select items from folders joined to that folder.

Joins have a master end and a detail end. The master end is the folder that has one row, for which there are several detail rows. For example, the relationship between a master row in the Department folder and the many detail rows in the Employee folder. Where every employee works for one department, a department can have none, one or many employees.

It is important to make sure you define the join with the correct folder as the master. In cases where a query uses three or more folders this can, in some circumstances, lead to misleading or incorrect results. It can also affect whether summary folders can be used to speed up queries. This chapter will help you to avoid this problem and correct it if it does occur.

## What are single item joins and multi item joins?

Single item joins relate two folders using an item that is common to both folders. For example, if we create a business area using the SCOTT schema, the Emp and Dept folders can be joined using the common item Deptno in a single join, that is where:

`Emp.Deptno=Dept.Deptno`

Multi-item joins relate two folders using more than one join condition, such that the join becomes true when all of the join conditions are met. For example, two folders (Emp and Salgrade) do not share the common items needed to create a single item join. The following example becomes true for an employee (i.e. the Emp folder becomes joined to the Salgrade folder) when the employee salary falls within the specified salary band:

Emp.Sal >= Salgrade.LoSal

Emp.Sal <= Salgrade.HiSal

For each salary record in the Emp folder (where the salary is between the lowest and the highest salary), Discoverer can display salary grade information about the employee from the Salgrade folder.

## About one-to-one join, one-to-many, and many-to-many joins

Usually joins are one-to-many, where one row in the master folder is joined to multiple rows in the detail folder.

Occasionally there are one-to-one and many-to-many joins. Many-to-many joins are not supported directly in Discoverer, or in any relational system, although they can always be reworked to be transformed to multiple many-to-one joins.

Users of Discoverer Plus (Discoverer Desktop and Discoverer Viewer) cannot set up their own join conditions. However, they can choose which join to use if more than one join exists.

For more information, see the ["Join Properties dialog"](#).

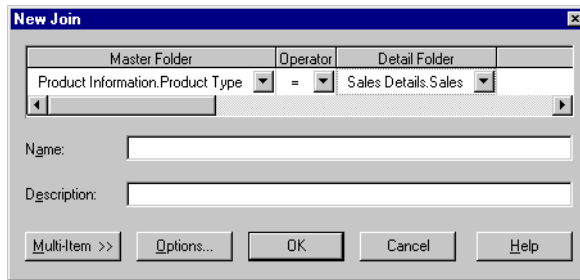
## How to create single item joins

To create a join:

1. Display the ["Workarea: Data tab"](#) and select the item to be the master item.
2. Choose Insert | Join to display the ["New Join dialog"](#). The master item is displayed in the **Master Folder** field.

**Note:** If you want to change the folder in the **Master Folder** or **Detail Folder** fields, click **More items** at the end of the drop down list. This reopens the New Join dialog, where you can select a different folder or item.

**Figure 10–1** New Join dialog



3. Choose an operator from the drop down list to specify the join type.
4. Click the **Detail Folder** down arrow to display the "New Join dialog".
5. Select the folder and the detail item for the join.

You can also choose a detail item from a folder in another open business area.

6. (optional) If you want to set specific join options, click Options to display the "Join Options dialog".
7. Click OK to close the New Join dialog.

The join is added to the folder in the Workarea. An icon next to it indicates the join relationship.

**Notes:**

- You can only join between items. You cannot directly include functions or literals (e.g. text strings, numbers, dates). The way to include functions or literals is to create calculated items that have the functions or literals you want to use, and then specify these in the join.
- Items in joins can be hidden later, allowing end users to benefit from the use of joined folders without having to see the join details.

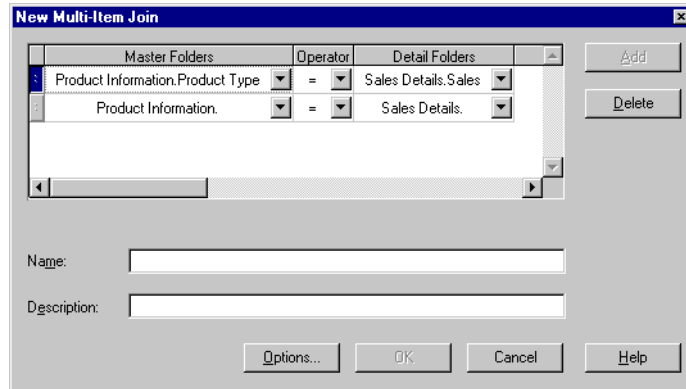
## How to create multi-item joins

You can add multiple items to the join between folders. In a multi-item join, all master items must belong to one folder and all detail items must belong to one folder.

To create a multi-item join:

1. Create the first join by following the instructions in "[How to create single item joins](#)"
2. With the "[New Join dialog](#)" displayed, click Multi-Item to display the "[New Multi-Item Join dialog](#)".

**Figure 10–2** *New Multi-Item join dialog*



3. Click Add to display a new row.  
Notice that the folders that appear by default are the same folders as in the previous row.
4. Use the drop down lists for **Master Folders** and **Detail Folders** to select a new pair of items.  
**Note:** If you add a master or detail item from a different folder, all items from the previous folder will be deleted from the join.
5. Continue to use the Add button to add items to the join, until the multi-item join contains all the necessary items.
6. Click OK to close the Multi-Item Join dialog.

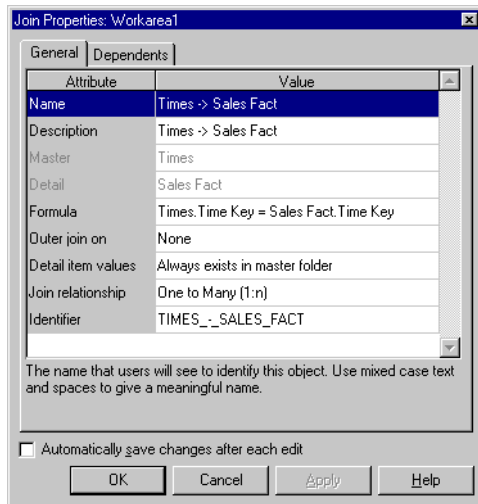
## How to edit join properties

Use the "[Join Properties dialog](#)" to view or edit all the EUL join properties for one or more selected joins. If you just need to view or edit join items, add new join items, view and amend join options or edit the join name and description use the Edit | Edit. option instead.

To edit join properties:

1. Select a join on the "Workarea: Data tab" and choose Edit | Properties to display the "Join Properties dialog".

**Figure 10–3** Join Properties dialog General tab



**Hint:** You can select more than one join at a time by holding down the Ctrl key and clicking another join.

All properties that are common to each of the selected joins are displayed. If the data for a field is not common to each of the selected joins, the field is blank.

2. Make your changes as required.
3. Click OK.

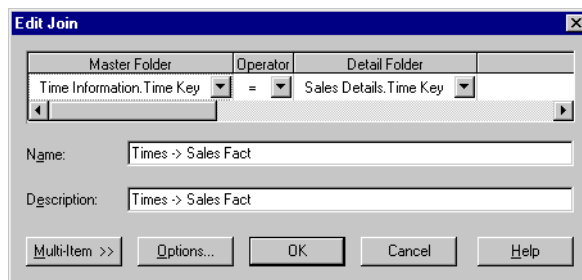
## How to edit joins

Use the "Edit Join dialog" to view and edit existing join items, add new join items, view and amend join options or edit the join name and description. If you want access to all the EUL join properties for one or more joins, select the join item(s) and choose Edit | Properties instead.

To edit an existing join:

1. Select a join on the "[Workarea: Data tab](#)" and choose Edit | Edit... to display the "[Edit Join dialog](#)".

**Figure 10–4** *Edit Join dialog*



**Note:** You use the Edit Join dialog in the same way as the New Join dialog (for more information, see "[How to create single item joins](#)").

2. Edit the join as required.
3. Click OK.

## How to delete joins

Use this option to delete one or more joins. Note that when you delete a join, other EUL objects might be affected if they use the join you want to delete. The Impact dialog enables you to review the other objects that might be affected when you delete a join.

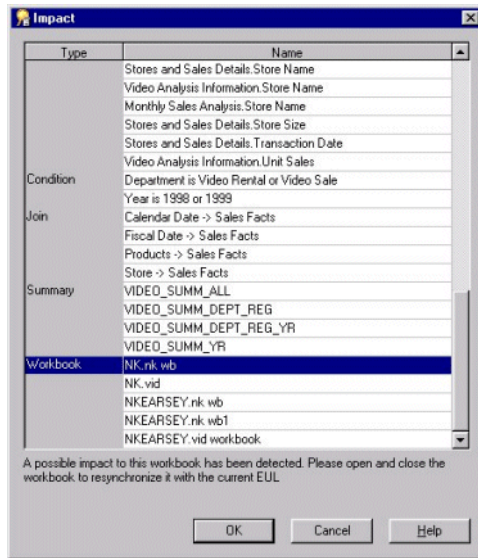
To delete a join.

1. In the "[Workarea: Data tab](#)" select the join that you want to delete.  
You can select more than one join at a time by holding down the Ctrl key and clicking another join.
2. Choose Edit | Delete to display the "[Confirm Delete dialog](#)".
3. (optional) You can review the objects that might be affected by deleting this join. To see the potential impact of the deletion:
  - a. Click Impact to display the "[Impact dialog](#)".

The Impact dialog shows other objects that might be affected by the deletion and helps you to make the right choice.

- b. (optional) Select a row in the Impact dialog to view text indicating what affect the current action will have on the EUL object.

**Figure 10–5** *The Impact dialog*



- c. When you have finished reviewing the impact of deleting the join, click OK to close the Impact dialog.

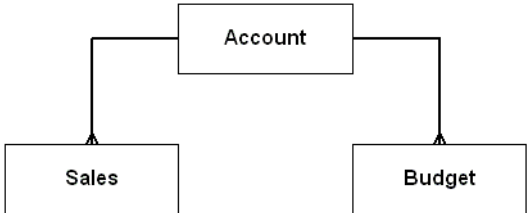
4. Click Yes if you still want to delete the selected join(s).

## What is a fan trap?

A fan trap is a schema (group of joined database tables) that can return unexpected results. The most common manifestation occurs when a master table is joined to detail tables independently. Although relationally correct, this kind of schema can result in incorrectly aggregated data points. The following example illustrates the point:



Figure 10-6 Example of a fan trap schema



The example fan trap schema includes a master folder (ACCOUNT) and two detail folders (SALES and BUDGET). Every account can have several sales figures and several budget figures for each period.

In the following example we will see how a seemingly straightforward query can produce incorrect results and how Discoverer avoids this problem. The figure below shows the data in our master and detail tables:

Figure 10-7 Fan trap schema with master and two detail folders

ACCOUNT	
ID	Name
1	Account 1
2	Account 2
3	Account 3
4	Account 4

BUDGET		
Accid	Budget	Period
1	200	1
1	200	2
2	100	3
3	150	2
3	250	3
3	350	4
4	100	1
4	100	2

SALES		
Accid	Sales	Period
1	100	1
1	100	2
1	200	3
2	50	1
2	80	2
3	200	3
4	150	2
4	50	3
4	100	4

If the Discoverer end user creates a query to answer the question, "what is the total sales and total budget by account?" the aggregates (SUM) from the two detail tables come from the same master table (ACCOUNT).

Discoverer delivers the following expected (and correct) result:

**Figure 10–8 Expected results (Discoverer)**

Account	Sales	Budget
Account 1	400	400
Account 2	130	100
Account 3	200	750
Account 4	300	200

In the results above, Discoverer selected ACCOUNT name, sum of SALES and sum of BUDGET.

If however, you use straightforward SQL, the following unexpected (incorrect) result is delivered:

**Figure 10–9 Unexpected (incorrect) results (straightforward SQL)**

Account	Sales	Budget
Account 1	800	1200
Account 2	130	200

Account	Sales	Budget
Account 3	600	750
Account 4	600	600

While the results in the above figure are relationally correct they are obviously wrong. For example, the above results indicate that the total sales for Account 1 are 800, but if you look at the Sales table in [Figure 10-7](#) you can see that the total sales figure for Account 1 is 400 (i.e. 100+100+200).

### How unexpected (incorrect) results are generated

The unexpected (incorrect) results above are based on a single query in which tables are joined together first in a temporary table and then the aggregation is done. This causes the aggregates to be summed (incorrectly) multiple times. The straightforward SQL that generates the incorrect results is:

```
SELECT Account.Name, SUM(sales), SUM(budget)
FROM
Account, Sales, Budget
Where
Account.id=Sales.accid
AND
Account.id=Budget.accid
GROUP BY
Account.Name
```

### Guaranteeing correct results

Every query generated by Discoverer is interrogated. Discoverer detects a fan trap and rewrites the query to ensure the aggregation is done at the correct level. Discoverer rewrites the query using inline views, one for each master-detail aggregation, and then combines the results of the outer query.

The following example shows the inline view SQL Discoverer uses to give correct results:

```
SELECT inACC as Name, SUM(inSalesSum) as SALES_SUM, ,SUM(inBudgetSum) as BUDGET_
_SUM,
FROM
(SELECT masterID AS OutMasterIDSales, SUM(SalesDetailsSales) AS inSalesSum
FROM
(SELECT ID AS masterID, NAME AS masterName FROM ACCOUNT) INLineAccount,
(SELECT ID AS SalesDetailId, ACCID AS SalesDetailAccID, SALES AS
```

```
        SalesDetailsSales FROM SALES )INLineSales
WHERE(masterID = SalesDetailAccID(+))
GROUP BY masterID) inner1,
(SELECT masterID AS OutMasterIDBudget, SUM(BudgetDetailBudget) AS inBudgetSum,
masterName AS inACC
FROM
    (SELECT ID AS masterID, NAME AS masterName FROM ACCOUNT) INLineAccount,
    (SELECT ID AS BudgetDetailId, ACCID AS BudgetDetailAccID, BUDGET AS
    BudgetDetailsSales FROM BUDGET )INLineBudget
WHERE(masterID = BudgetDetailAccID(+))
GROUP BY masterName, masterID ) inner2
WHERE ((OutMasterIDBudget = OutMasterIDSales))
GROUP BY inACC
```

The result is correct because each sale and each budget is summed individually (one for each master-detail aggregation) and is then combined with a join based on the master key(s).

### **Discoverer prevents queries involving unresolvable fan trap schemas**

Discoverer will normally resolve a query that involves a fan trap schema. In situations where a query involves an unresolvable fan trap schema, Discoverer disallows the query and displays an error message.

Discoverer prevents queries involving unresolvable fan trap schemas in the following circumstances:

- the detail folders are using different keys from the master for the join
- there is a direct join relationship between the detail folders (thereby creating an ambiguous circular relationship)
- non-aggregated values are chosen from more than one of the detail folders
- more than one detail folder has a separate join relationship to a different master folder

For more information about enabling or disabling fan trap detection in Discoverer, see the *Oracle9iAS Discoverer Plus User's Guide*.

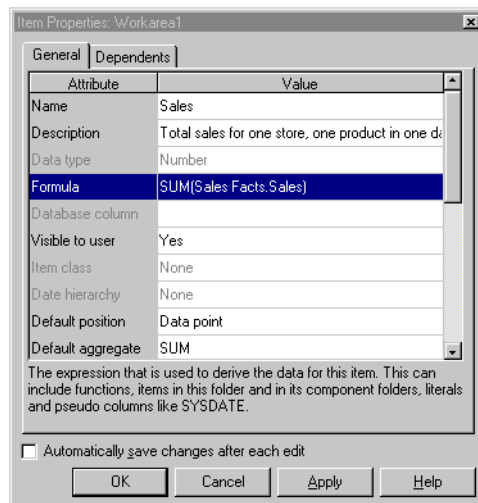
## **What to do if you set up a fan trap inside a complex folder**

Discoverer warns about fan trap join configurations in complex folders by displaying a message indicating that an invalid join configuration exists. To ensure that Discoverer returns correct results for complex folders (where a fan trap join configuration exists inside a complex folder), you can specify the aggregates to use for the

details by editing the item properties and setting the formula (for example SUM(Sales Fact.Sales)).

The figure below shows the aggregate (SUM) specified for an item in a complex folder.

**Figure 10–10** Example of an aggregate formula specified for an item in a complex folder



For more information about joins, see the *Oracle9i Database Documentation*.

## What to do if you have a data type mismatch in a join

Discoverer does not allow joins between different data types (e.g. varchar, numeric or date). However, if you have upgraded from a previous version of Discoverer, an existing join might already exist between mismatched data types. Where an existing exists that joins two items with mismatched data types, Discoverer runs the query but displays an error message and does not complete the query. Discoverer also displays an error message when you try to edit a join that contains items that have mismatched data types.

You can create a join between two items that have mismatched data types by:

- creating a new item based on the first mismatched item

- creating a calculation in the new item that converts the data type of the new item (e.g. `to_char()`, `to_date()`, `to_number()`) so that the new item is no longer mismatched with the second item
- creating a join between the new item and the second item that had a mismatched data type

The following tasks illustrate how you might create a join between two items that have mismatched data types. The tasks use the Video Store Tutorial business area (for more information about loading the Video Store Business area, see the *Oracle9i Discoverer Administrator Tutorial*).

The following tasks create a join between two items, Day of Week (varchar) and Transaction Date (date) that have mismatched data types. In order to join these two items you must create a new item and then create a join as follows:

- ["How to create a new item that converts the Day of Week item from a varchar to a date data type"](#)
- ["How to create a join between two items that have the same data type"](#)

## How to create a new item that converts the Day of Week item from a varchar to a date data type

To create a new item that converts the Day of Week item from varchar to a date data type:

1. Select the Calendar Date folder from the Video Store Tutorial business area.  
This is where you will create the new item.
2. Choose Insert | item to display the ["New Item dialog"](#).
3. Select the **Functions** radio button to display the function folders.
4. Click the + symbol next to the **Conversion** folder to display the conversion functions.
5. Select the `TO_DATE` function and click `PASTE>>`.

This pastes the `TO_DATE` function into the **Calculation** field for this new item.

6. Replace the text in the **Calculation** field between the brackets of the `TO_DATE` function with the following text:

```
Day of Week,Day
```

The **Calculation** field will now display the following text:

```
TO_DATE(Day of Week,Day)
```

**Note:** The calculation above creates a new item based on the Day of Week (varchar) item and converts it to a date data type using the TO\_DATE function.

7. Click OK to create the new item.

You have now created a new item based on the Day of Week (varchar) item that has been converted to a date data type.

## How to create a join between two items that have the same data type

The following task illustrates how you can join the new item in the Calendar Date folder (that you created in the previous task), with the Transaction Date item from the Store and Sales Details folder:

To create a join between two items that have the same data type:

1. Choose the new item in the Calendar Date folder that you created in the previous task.
2. Choose Insert | Join to display the "New Join dialog".
3. Click the Detail Folder drop down list to display the "New Join dialog".

This New Join dialog enables you to select the detail folder or item for the new join.

4. Click the + symbol next to the Store and Sales Details folder to expand the folder items.
5. Select the Transaction Date item and click OK.
6. Click OK.

Discoverer creates the join using the newly created item that has a matching data type. The new item has been created with a data type that matches the other item, therefore Discoverer is able to create a valid join.





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# Creating and maintaining calculated items

## Creating and maintaining calculated items

This chapter explains how to create and maintain calculated items using Discoverer Administrator, and contains the following topics:

- "What are calculated items?"
- "What are derived items?"
- "What are aggregate calculated items?"
- "What restrictions apply to aggregate calculated items?"
- "What are the differences between analytic functions and aggregate calculated items?"
- "What are aggregate derived items?"
- "Example of an aggregate derived item"
- "How to create calculated items"
- "How to edit calculated item properties"
- "How to edit calculated items"
- "How to delete calculated items"
- "Why do you need PL/SQL functions?"
- "What are custom PL/SQL functions?"
- "About registering custom PL/SQL functions"
- "How to register custom PL/SQL functions automatically"
- "How to register custom PL/SQL functions manually"

## What are calculated items?

A calculated item is an item that uses a formula to derive data for the item.

Calculated items enable Discoverer end users to apply business calculations to the data. For example, typical business calculations might include:

- profit margins
- average revenues per month
- expected sales
- percent of profit by product type

Calculated items behave like any other item in a folder and can be used in conditions, summary folders, lists of values, joins, and other calculated items.

As the Discoverer manager, you can create calculated items and make them available for inclusion in workbooks.

Creating calculated items provides the following benefits:

- Discoverer end users can include a complicated calculation in their worksheets simply by selecting a calculated item
- you can add new items to a folder that do not exist as columns in the underlying database tables

You create calculated items using expressions that can contain:

- existing items
- operators
- literals
- functions

There are three types of calculated items:

- derived items (for more information, see "[What are derived items?](#)")
- aggregate calculations (for more information, see "[What are aggregate calculated items?](#)")
- aggregate derived items (for more information, see "[What are aggregate derived items?](#)")

You can obtain more information about calculations in Discoverer from the following sources:

- for worked examples of calculations, see the *Oracle 9iAS Discoverer Plus User's Guide*
- for information on function syntax, see the latest *Oracle SQL Reference* documentation

## What are derived items?

A derived item is an expression that behaves in the same way as any other item in a folder. Derived items can be axis items or data points and can be used anywhere that you would use an ordinary item. The value of a derived item depends only on the value of the other items in the same row, and will be the same regardless of which other items are included in the workbook.

The following are examples of derived items:

- `Sal*12+NVL(Comm,0)` - returns annual salary plus commission
- `Initcap(Ename)` - capitalizes the first letter of Ename
- `1` - returns the value 1
- `Sysdate-7` - returns today's date minus seven days

## What are aggregate calculated items?

An aggregated calculated item is a calculated item to which a GROUP function is applied (e.g. SUM, COUNT, MAX, MIN, AVG, DETAIL).

The following are examples of aggregate calculations:

- `SUM(Sal)*12`
- `SUM(Comm)/SUM(Sal)`
- `AVG(Monthly Sales)`

Aggregate calculation values depend on other items used in the Discoverer Plus worksheet. How the axis items are grouped together affects the number of rows that are aggregated. This is particularly important in the case of calculations that are ratios of two aggregates.

For example, to calculate a margin, you would use the calculation `SUM(Profit)/SUM(Sales)` rather than `Profit/Sales`. Used in a query, the latter would

result in  $SUM(\text{Profit}/\text{Sales})$ , which produces a different result from  $SUM(\text{Profit})/SUM(\text{Sales})$ . The example uses the SUM aggregate, but same can be applied for any of the other aggregates (e.g. SUM, COUNT, MAX, MIN, AVG, DETAIL).

**Note:** If you want to compute the sum of a ratio of two data points, always sum data points before computing the ratio.

## What restrictions apply to aggregate calculated items?

When creating aggregate calculated items, note that a number of restrictions apply to aggregate calculations. Aggregate calculated items:

- must have their **Default Position** property set to data point
- must have their **Default Aggregate** property set to detail
- must reference items in the current folder only
- cannot be used in a join
- cannot be used in a mandatory condition
- cannot be used in a hierarchy
- cannot have an item class
- cannot be dragged into a complex folder
- cannot have further aggregation functions applied to them in Discoverer Plus

Aggregate calculations do not affect the number of rows of data referenced by the folder. They only affect generated SQL when selected in Discoverer Plus.

## What are the differences between analytic functions and aggregate calculated items?

Analytic functions behave like aggregate calculations except for the following (for more information, see the Glossary entry "[analytic functions](#)"):

- Analytic functions do not require aggregation in Discoverer. All other restrictions that apply to aggregate functions also apply to analytic functions (for more information, see "[What restrictions apply to aggregate calculated items?](#)").
- Analytic function aggregation is derived from the database server, not the memory cache. Therefore analytic function aggregation has a performance overhead.

- Analytic functions are only available in Oracle 8.1.7 databases or later.

For more information about analytic functions see the *Oracle 9iAS Discoverer Plus User's Guide*.

## What are aggregate derived items?

Aggregate derived items are calculated items created in a complex folder that aggregate another aggregate calculated item (in the same complex folder). In other words, an aggregate derived item is simply an aggregate calculated item nested inside another aggregate calculated item.

Aggregate derived items enable you to apply an aggregation (e.g. AVG, SUM, COUNT) to the current level of aggregation to derive additional information.

Aggregate derived items behave in all respects like ordinary derived items (for more information, see "[What are derived items?](#)").

## Example of an aggregate derived item

This example explains how an aggregate derived item is used to display the average monthly sales per store over one year, for a video stores chain. The aggregate derived item in this example uses an aggregate calculated item created in the same folder. For more information about aggregate calculated items, see "[What are aggregate calculated items?](#)".

This example uses two complex folders, Video Analysis and Monthly Sales Analysis, that are created when you complete the Discoverer Administrator Tutorial exercises (for more information, see the *Discoverer Administrator Tutorial*).

An aggregate derived item is created in the complex folder Monthly Sales Analysis. The Monthly Sales Analysis complex folder is built by dragging the following items from the Video Analysis complex folder (for more information, see the *Discoverer Administrator Tutorial*):

- Department
- Region
- City
- Store Name
- Year
- Quarter

- Month

The complex folder Monthly Sales Analysis references a row of data for every store, for every month.

An aggregate calculated item (Monthly Sales Per Store) is created in the Monthly Sales Analysis complex folder using the following formula:

SUM(Video Analysis.Sales)

This item shows the total sales for a given store in a given month.

**Figure 11–1 Result of query using the aggregate calculated item SUM(Video Analysis.Sales)**

Month	Monthly Sales per Store SUM	Store Name
Jan	£26,091.99	Store No. 1
Feb	£20,483.19	Store No. 1
Mar	£25,258.85	Store No. 1
Apr	£32,459.99	Store No. 1
May	£30,766.77	Store No. 1
Jun	£22,529.44	Store No. 1
Jul	£13,735.11	Store No. 1
Aug	£14,027.78	Store No. 1
Sep	£12,931.60	Store No. 1
Oct	£11,810.50	Store No. 1
Nov	£10,011.17	Store No. 1
Dec	£10,414.49	Store No. 1
Jan	£2,914.94	Store No. 10

An aggregate derived calculated item (called Average Monthly Sales per Store), is created in the Monthly Sales Analysis complex folder using the following formula:

AVG(Monthly Sales Per Store)

This item shows the average total sales for a given store in a given month.

**Figure 11–2 Result of query using the aggregate derived calculated item AVG(Monthly Sales Per Store)**

Month	Average Monthly Sales per Store	Store Name
Jan	£2,174.33	Store No. 1
Feb	£1,706.93	Store No. 1
Mar	£2,104.90	Store No. 1
Apr	£2,705.00	Store No. 1
May	£2,563.90	Store No. 1
Jun	£1,877.45	Store No. 1
Jul	£1,144.59	Store No. 1
Aug	£2,337.96	Store No. 1
Sep	£2,155.27	Store No. 1
Oct	£1,181.05	Store No. 1
Nov	£1,668.53	Store No. 1
Dec	£1,735.75	Store No. 1
Jan	£264.99	Store No. 10

## Notes

The Average Monthly Sales per Store item shows the average monthly sales and can be analyzed over region, quarter, year, which is useful to compare trends. This form of nested aggregate is only possible by creating the aggregate item in a new folder. The aggregate item must be created in a new folder because the new folder now represents monthly sales, not the individual sales that were in the original complex folder.

Aggregate derived items cause the SQL created by Discoverer to contain a GROUP BY clause that forces Discoverer end user queries to return one row for each combination of the non-aggregated items, regardless of whether the calculation is used in the query. This reduces the number of rows returned by the folder, because the rows are aggregated at the level of the other items.

## How to create calculated items

You can create calculated items, derived items, aggregate calculated items and aggregate derived items using this task.

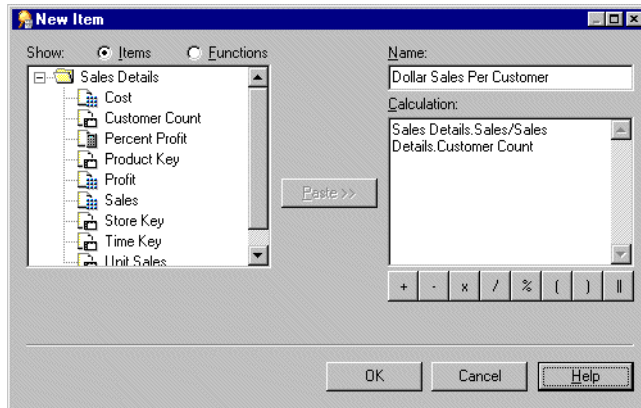
To create a new calculated item:

1. Select the folder that you want to contain the new calculated item on the ["Workarea: Data tab"](#).
2. Choose [Insert | Item...](#) to display the ["New Item dialog"](#).

This dialog enables you to create a new calculated item and add it to the selected folder.

**Note:** If you did not select a folder, Discoverer Administrator displays the "New Item dialog" where you can select a folder to contain your new calculation (you can select any folder from any open business area).

**Figure 11–3** New Item dialog



3. Specify a **Name** for the new calculated item.
4. Enter the calculation in the **Calculation** field as follows:
  - if you know the calculation syntax, type the calculation directly into the **Calculation** field
  - if you do not know the calculation syntax, you can build up the calculation in stages by:
    - selecting the Items button to display the items in the selected folder and selecting the item to use in the calculation (if the folder is a complex folder, all of the source folders and their items are displayed)
    - selecting the Functions button to display the available functions grouped by Type, and selecting the functions to use in the Calculation (registered custom PL/SQL functions are displayed in the database group)
    - selecting the appropriate Operator button

**Note:** Calculations follow the standard Oracle calculation syntax. For a full description of this syntax, see the *Oracle SQL Language Reference Manual*.



5. (optional) Click either **Items** or **Functions** and use the **Operator** buttons to construct your calculation (if you don't know the function syntax):
  - **Items**

Displays a list of the items in the selected folder (if a complex folder, the source folders and their items are also displayed here).

You can insert an item into your calculation (double-click it or use **Paste**).
  - **Functions**

Displays a list of the functions (grouped by type) available for use in your calculation.

Registered custom PL/SQL functions are displayed in the **Database** group. For more information, see "[What are custom PL/SQL functions?](#)"

You can insert a function into your calculation (double-click it or use **Paste**).
  - **Operators**

Operators are listed along the bottom of the **Calculation** area. Click an operator to insert one into your calculation.

**Hint:** You can resize the "[New Item dialog](#)" to give you more room to specify your calculation.
6. Click **OK** when you have finished specifying the formula.

If there are no errors in the formula, the new item is created. If there are errors in the formula, Discoverer Administrator displays the first error and returns you to the **New Item** dialog so that you can correct it.

You can now use the new calculated item to create joins or conditions, even new calculations. You can also include the new calculated item in other calculated items.

## How to edit calculated item properties

To edit calculated item properties see [Chapter 9, "How to edit item properties"](#) for more information.

## How to edit calculated items

To edit an existing calculation:

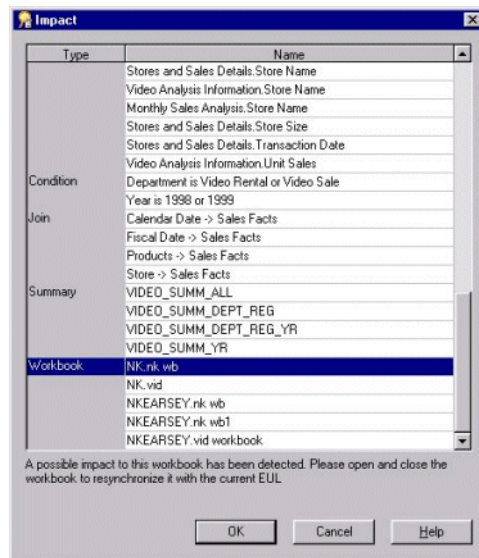
1. Select the calculated item on the "**Workarea: Data tab**" and choose Edit | Edit... to display the "**Edit Calculation dialog**".
2. Edit the **Calculation** as required.
3. Click OK to save the changes you have made and close the dialog.

## How to delete calculated items

Use this option to delete one or more calculated items. Note that when you delete a calculated item, other EUL objects might be affected if they use the calculated item you want to delete. The Impact dialog enables you to review the other objects that might be affected when you delete a calculated item.

To delete a calculated item:

1. On the "**Workarea: Data tab**" select the calculated item that you want to delete.  
You can select more than one item at a time by holding down the Ctrl key and clicking another item.
2. Choose Edit | Delete to display the "**Confirm Delete dialog**".
3. (optional) You can review the objects that might be affected by deleting this item. To see the potential impact of the deletion:
  - a. Click Impact to display the "**Impact dialog**".  
The Impact dialog shows other objects that might be affected by the deletion and helps you to make the right choice.
  - b. (optional) Select a row to view text indicating what affect the current action will have on the EUL object.

**Figure 11–4 The Impact dialog**

- c. When you have finished reviewing the impact of deleting the item, click OK to close the Impact dialog.

4. Click Yes if you still want to delete the selected item(s).

## Why do you need PL/SQL functions?

PL/SQL functions are one of Oracle's procedural extensions to SQL. PL/SQL functions offer access through PL/SQL references in the SQL, to PL/SQL functions that run in the Oracle server. PL/SQL functions enable you to compute values in the database. For more information about PL/SQL functions, see the *PL/SQL User's Guide and Reference*.

## What are custom PL/SQL functions?

Custom PL/SQL functions are PL/SQL functions created by the Discoverer manager that are designed to meet additional Discoverer end user requirements (e.g. to provide a complicated calculation). Custom PL/SQL functions supplement the PL/SQL functions provided by Oracle and are available to all database processes.

You create custom PL/SQL functions using SQL\*Plus, or a procedural editor. You do not create custom PL/SQL functions directly in Discoverer Administrator. For more information see the *SQL\*Plus User's Guide and Reference*.

**Note:** In Discoverer Plus, folders containing derived items (for more information, see "[What are derived items?](#)") that use PL/SQL functions will be visible only to users who have EXECUTE database privileges on those functions.

## About registering custom PL/SQL functions

To access custom PL/SQL functions using Discoverer, you must register the functions in the EUL. When you have registered a custom PL/SQL function, it appears in the list of database functions in the "[Edit Calculation dialog](#)" and can be used in the same way as the standard Oracle functions.

You can register custom PL/SQL functions in two ways:

- Import automatically, by importing the functions (recommended)

We recommend you register PL/SQL functions by importing automatically (especially if you have many functions to register), because it is easy to make mistakes when manually entering information about functions. When you import functions, all of the information about each function (e.g. names, database links, return types, lists of arguments) is imported. Importing ensures correct information about the function, because the information does not have to be manually entered on a function-by-function basis.
- Manually

Manual registration requires that you register each function individually by supplying all of the information about the function.

## How to register custom PL/SQL functions automatically

To register PL/SQL functions automatically you must import them in the following way:

1. Choose Tools | Register PL/SQL Functions to display the "[PL/SQL Functions dialog: Functions tab](#)".
2. Click Import to display the "[Import PL/SQL Functions dialog](#)".

This dialog enables you to select the PL/SQL functions that you want to import.

3. Select the functions that you want to import

You can select more than one function at a time by holding down the Ctrl key and clicking another function.

4. Click OK.

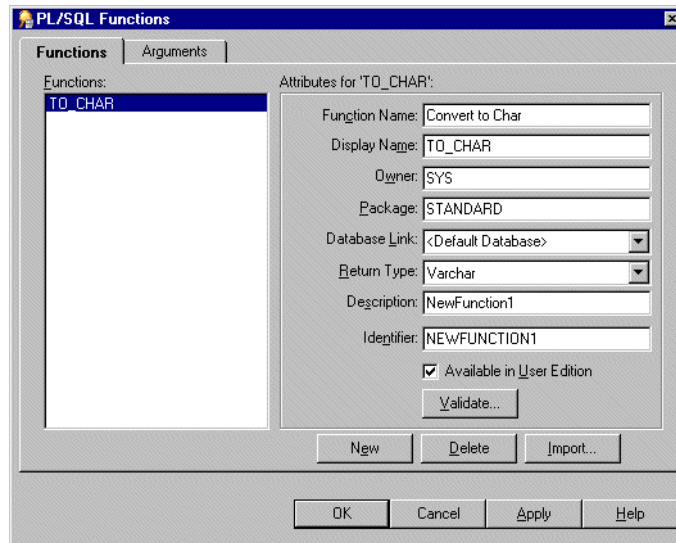
Information about the selected functions is imported automatically. In other words, you do not have to manually enter information or validate the information.

## How to register custom PL/SQL functions manually

To manually register a PL/SQL function for use in Discoverer:

1. Choose Tools | Register PL/SQL Functions to display the "PL/SQL Functions dialog: Functions tab".

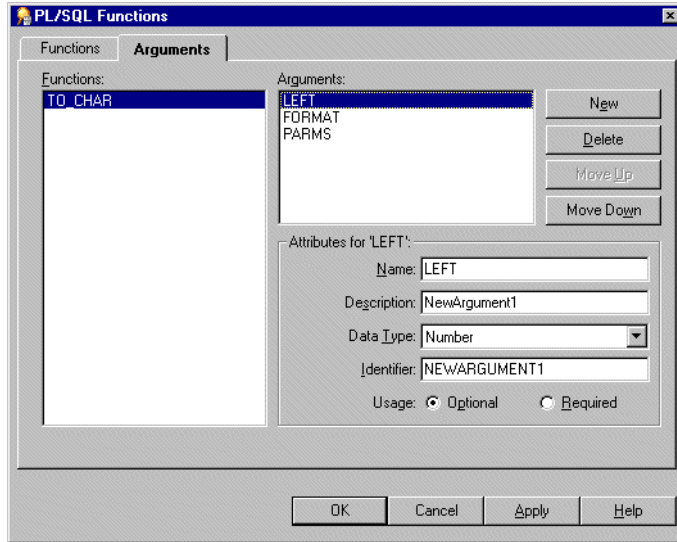
*Figure 11–5 PL/SQL Functions dialog: Functions tab*



2. Click New and specify the function attributes.
3. Click Validate to check the validity and accuracy of the information you have entered.
4. If the function is invalid, correct the attributes and click Validate again.
5. (optional) If the function accepts arguments:

- a. Display the "PL/SQL Functions dialog: Arguments tab".
- b. On the Arguments tab, click New and specify the argument attributes.

**Figure 11–6** PL/SQL Functions dialog: Arguments tab



6. Click OK when you have finished defining the function.

The custom PL/SQL function is now registered for use in Discoverer.

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# Creating and maintaining conditions

## Creating and maintaining conditions

This chapter explains how to implement conditions using Discoverer Administrator, and contains the following topics:

- "What are conditions?"
- "What are the different types of condition?"
- "How to create simple conditions"
- "How to create advanced conditions"
- "How to edit conditions"
- "How to edit condition properties"
- "How to delete conditions"
- "Example conditions"
- "About outer joins and the DisableAutoOuterJoinsOnFilters registry setting"
- "How to create row level security using a mandatory condition"
- "How to enable summary folders if a source folder includes a mandatory condition (e.g. with row level security)"

## What are conditions?

Conditions filter worksheet data, enabling Discoverer end users to analyze only the data they are interested in. For example, you might want to give Discoverer end users access to data for 2001, but not 1999 or 2000.

You also use conditions to restrict access to sensitive data. By imposing mandatory conditions, only non-sensitive data is made available to Discoverer users (see "[What are the different types of condition?](#)"). You can make sure that Discoverer end users only see the data that you want them to see.

As a Discoverer Administrator, you can anticipate commonly used conditions and make them available to Discoverer end users so they can apply them in worksheets. This enables Discoverer end users to work efficiently.

### Notes

Discoverer Plus users can also create their own conditions.

## About condition categories

Conditions are categorized as follows:

- Simple conditions - these contain a single condition statement. For example, 'display data where year = 2001'.
- Advanced conditions - these contain two or more condition statements. For example:  
display data where year = 2001 AND quarter = 1 AND region = south.
- Nested conditions - these contain condition statements that are defined within other condition statements. For example:  
display data where year = 2001 AND (region = north OR region = south)  
here, the OR clause is nested within the AND clause.
- Advanced nested conditions - these contain two or more condition statements and also include condition statements defined within the advanced condition. For example:  
display data where year = 2001 AND quarter = 1 AND region = south' AND (region = north OR region = south)  
here as in the nested example, the OR clause is nested within the AND clause)

As an alternative to creating advanced conditions, you might want to create two or more single conditions and apply them at the same time. This enables Discoverer users to be more selective about which parts of the condition they use.

**Note:** There can be subtle differences between applying advanced conditions and equivalent multiple single conditions (for more information, see *Oracle 9iAS Discoverer Plus User's Guide*).



## How do conditions work in Discoverer?

Conditions work in Discoverer by matching condition statements against worksheet data so that:

- data matching your condition statements is displayed in workbooks
- data not matching your condition statements is not displayed in workbooks

For example, you might want to limit the display of data to the last two years of sales. Or, you might want to see the data for only two types of sales items. Each of these tasks involves filtering the data to find information that meets the conditions.

## What are the different types of condition?

There are two types of condition:

- mandatory condition
- optional condition

You create mandatory and optional conditions in the same way. However, note the following:

- mandatory conditions are always applied to a worksheet that contains one or more items from the folder that contains the condition. Discoverer Plus users are not notified of mandatory conditions and can not turn them off.

For example, you might want to assign a mandatory condition to sales data for regional sales managers, limiting their view of sales to the region for which each manager is responsible.

- optional conditions can be turned on or off as required by Discoverer Plus users. They can also view a condition's formula, but they are not allowed to edit the formula.

For example, a Vice President responsible for all sales regions should be able to see all of the sales data, and also be able to apply conditions to see sales data relating to specific sales regions.

The table below shows further differences between mandatory and optional conditions:

**Table 12–1 Differences between a mandatory and optional condition**

<b>Mandatory condition</b>	<b>Optional condition</b>
Always applied to the results of a folder.	Only applied to the results of a folder if selected in Discoverer Plus.
Used by the Discoverer manager to permanently restrict the rows returned by a folder.	Provided by the Discoverer manager as a shortcut to help users build conditions more easily.
Invisible in Discoverer Plus.	Visible (but not editable) in Discoverer Plus.
When created in a complex folder, can reference items in the source folders.	When created in a complex folder, can only reference items in the complex folder.
Affects the result set (in the database) of the folder definition in the EUL.	Does not affect the result set (in the database) of the folder definition in the EUL (because an optional condition is only used when applied in Discoverer Plus).
When added, changed, or deleted, cause any summaries based on the folder to become invalid, because their result set no longer matches that of the folder.  These summaries are set to “Refresh required” and must be refreshed to be made available again.	When added, changed, or deleted have no affect on summaries based on the folder.

### Notes

If you create a complex folder from items in a folder that contains a mandatory condition, the results in the complex folder are restricted by the mandatory condition on the original folder. You can see any mandatory conditions that impact a complex folder using the Components tab of the complex folder’s Properties dialog.

## How to create simple conditions

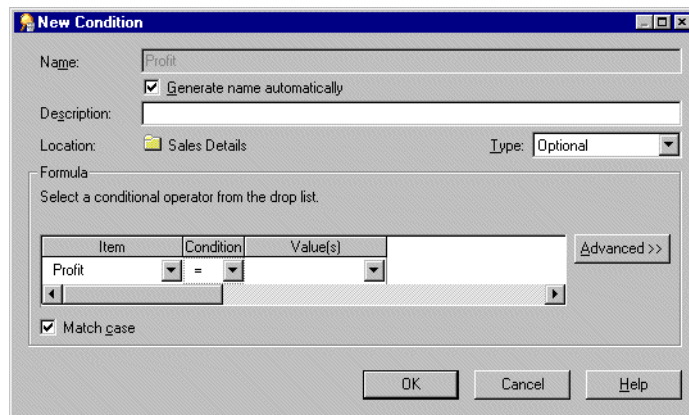
You create a simple condition when you want Discoverer end users to filter worksheets in a new way. You add the condition to a folder so that Discoverer end users can apply the condition when using workbooks based on the folder.

For example, you might want to create an optional condition that filters data to display results for the current year, because Discoverer end users might only be interested in data for that year. Or, you might want to restrict access to sensitive data by imposing a mandatory condition on a particular area of data (see "[What are the different types of condition?](#)").

To create a single condition:

1. On the "[Workarea: Data tab](#)", do one of the following:
  - select the folder in which you want to create the condition
  - select the item that you want to form part of your condition
2. Choose Insert | Condition to display the "[New Condition dialog](#)".

**Figure 12–1** *New Condition dialog*



**Note:** If you choose Insert | Condition without first selecting a folder or item, Discoverer prompts you to choose a folder or item before displaying the dialog.

3. (optional) Enter a name for the condition in the **Name** field.

**Note:** By default, Discoverer Administrator creates a default condition name for the condition, based on the condition itself. However, you can specify your own name for the condition.

4. (optional) To specify your own name for the condition:
  - a. Clear the **Generate name automatically** check box.

- b. Enter a name for the condition in the **Name** field.
5. (optional) Enter a brief description of the condition in the **Description** field.  
The text entered here is displayed when the condition is edited in Discoverer Administrator or when the condition is highlighted by end users.
6. Specify the type of condition from the **Type** drop down list as follows:
  - select **Optional** if you want Discoverer end users to be able to turn the condition on or off
  - select **Mandatory** if you want the condition to always apply
7. Define the condition statement in the Formula area as follows:
  - a. Choose what item or calculation you want to filter the data on using the **Item** drop down list. For example, choose Year if you want to display data for a particular year. To create a calculation that you want to filter data on click **Create Calculation...** (for further information, see [Chapter 11, "Creating and maintaining calculated items"](#)).
  - b. Choose how to match data against the item using the **Condition** drop down list. For example, choose the '>' (greater than) symbol to filter data where the item value is greater than a particular number.
  - c. Define what data or items you want to match against using the **Values** drop down list. For example, enter 2002 to look only at data for the year 2002. If you created a list of values for the item, these items appear in the drop down list (for more information about lists of values, see [Chapter 9, "Maintaining items and item classes"](#)). To choose an item that you want to match against click **Select Item...** and select an item from the list.
8. Specify whether to match the case of text data using the **Match Case** check box as follows:
  - select the **Match Case** check box to make the condition case sensitive
  - clear the **Match Case** check box to make the condition case insensitiveFor example, when the **Match Case** check box is selected, the match value 'New York' would not return data for 'new york'.
9. Click OK do save the details and close the New Condition dialog.

The new condition is displayed on the "[Workarea: Data tab](#)". When Discoverer users access this business area, they will see this condition item in a folder. Note that seeing a condition in the folder does not mean that the folder is filtered. The end user must select and use the condition in a workbook.

**Notes**

When you create a condition based on an analytic function (i.e. a function that computes aggregate values based on a group of rows), you must designate the condition Type as optional (for more information, see "[What are the different types of condition?](#)"). If you choose mandatory, a message is displayed informing you that analytic functions are not allowed in mandatory conditions.

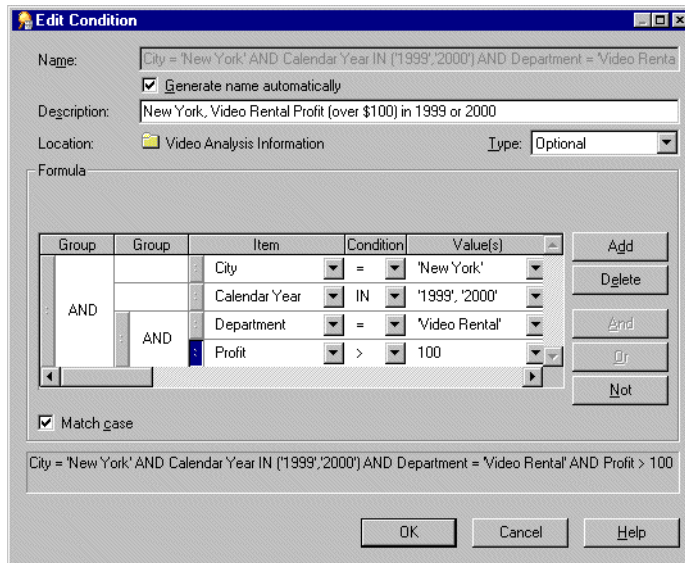
## How to create advanced conditions

Advanced conditions are conditions that contain more than one condition statement. For example, if you want to filter data for the city New York in either 1999 or 2000, you might create the condition City = New York AND (Year = 1999 or 2000). You could then nest an existing condition within the existing advanced condition. For example, where Department = Video AND Rental Profit > \$100. In Discoverer, it is easy to add as many condition statements as you want, enabling you to build powerful condition items.

To create an advanced condition:

1. Create the first condition statement by following the instructions in "[How to create simple conditions](#)"
2. To add more condition statements, click Advanced.

**Figure 12–2 New Condition dialog (Advanced)**



Discoverer adds Insert buttons for Add, And and Or. You use these buttons to create the advanced condition.

**3. Build the advanced condition as follows:**

- a. Click Add to insert a new condition statement.
- b. Specify the item for the new condition statement as follows:
  - Select the drop down list in the **Item** column and choose an item from the list of items displayed.
  - Select the drop down list in the **Item** column and choose the **Create Calculation** option to create a calculation to include in the advanced condition.
  - Select the drop down list in the **Item** column and choose the **Copy Condition** option to include a copy of an existing condition in the advanced condition. The copy can be edited as it is a copy of the original condition.
  - Select drop down list in the **Item** column and choose the **Select Condition** option to include an existing condition in the advanced condition. If you select an existing condition, it cannot be edited here.

- c. Specify the condition and value for the new condition statement.
- d. Specify how you want to combine the condition statements.

**Note:** You can use the handles next to each condition statement to highlight a condition statement and carry out the following actions:

- click a group and click AND to specify that all condition statements must be met for the condition
- click a group and click OR to specify that one of the condition statements must be met for the condition
- click a group and click NOT to specify that no condition statements must be met for the condition
- click Delete to remove condition statement lines from the condition.
- drag and drop a handle (next to a condition statement) to reposition the condition statement in a nested hierarchy.
- double click a group to change from AND to OR or vice versa

**Note:** If you reposition a condition statement, it can affect the order in which the condition statement is applied within the advanced condition (i.e. nested condition statements are applied first).

4. When you have finished, click OK to save the advanced condition and close the dialog.

The new condition is displayed on the "[Workarea: Data tab](#)". When Discoverer users access this business area, they will see this condition item in the business area folder.

## How to edit conditions

You edit a condition to change the way that it behaves. For example, you might want to:

- change the name of a condition
- change the data being returned by the condition
- create a more advanced condition

To edit a condition:

1. On the "[Workarea: Data tab](#)", select the condition that you want to edit.
2. Choose Edit | Edit... to display the "[Edit Condition dialog](#)".

Item	Condition	Value(s)
Department	IN	'Video Sale', 'Video Rental'

3. Edit the condition details as required.
4. Click OK to save the details and close the dialog.

The updated condition is displayed on the "[Workarea: Data tab](#)".

### Notes

You can also use the "[Condition Properties dialog](#)" to change conditions.

## How to edit condition properties

You edit a condition's properties to change the way that it behaves, or change its Identifier (for more information, see [Chapter 3, "What are identifiers?"](#)), which is a



unique Discoverer identification label. You can also change the way that a condition behaves by editing the condition itself (for more information, see "[How to edit conditions](#)").

To edit condition properties:

1. On the "[Workarea: Data tab](#)", select the condition that you want to edit.
2. Choose Edit | Properties to display the "[Condition Properties dialog](#)".
3. Edit the condition properties.
4. Click OK to save the details and close the dialog.

The "[Workarea: Data tab](#)" is updated to reflect any changes made to the condition.

## How to delete conditions

You delete a condition when you want to remove it permanently from the business area. For example, you might have previously filtered data relating to the year 2000, and would now like Discoverer users to access data relating to all available years.

To delete a condition:

1. On the "[Workarea: Data tab](#)", select the condition that you want to delete.
2. Choose Edit | Delete to display the "[Confirm Delete dialog](#)".
3. Click Yes at the confirmation screen to remove the condition permanently.

The condition is removed from the business area.

### Notes

When Discoverer users next re-open workbooks that use a deleted condition, or refresh the worksheets using the deleted condition, previously filtered out data will be available to the Discoverer end users.

## Example conditions

The following examples show how conditions are used in Discoverer Administrator.

### Notes

For more examples of conditions, see the *Oracle 9iAS Discoverer Plus User's Guide*.

### Example 1: Using a condition to find data for the year 2002

To create a condition that returns only data for the year 2002, enter the following in the Formula area of the New Condition dialog:

Item	Condition	Value
Year	=	2002

### Example 2: Using a condition to find sales in the last seven days

To create a condition that only returns the sales in the last seven days (using the calculated item, “Transaction Age (in Days)”), enter the following in the Formula area of the New Condition dialog:

Item	Condition	Value
Transaction Age (in days)	<	7

Note that the Transaction Age calculated item has the following formula

FLOOR (SYSDATE - Transaction Date)

This type of condition is sometimes described as a “rolling window” condition because the “window” of rows it returns changes from day to day.

### Example 3: Using a condition to find shipments in Quarter 3

To create a condition that only returns shipments made in quarter 3 (Q3) regardless of year (using the calculated item, 'Ship Quarter'), enter the following in the Formula area of the New Condition dialog:

Item	Condition	Value
Ship Quarter	=	'Q3'

Note that the Ship Quarter calculated item has the following formula:

EUL\_DATE\_TRUNC(Ship Date, “Q”)

## About outer joins and the DisableAutoOuterJoinsOnFilters registry setting

If you define an outer join between two tables, make sure you are aware of how conditions (filters) and the DisableAutoOuterJoinsOnFilters Discoverer registry setting can combine to affect the rows of data returned by an end user query.

You define an outer join between two tables to display:

- rows in a master table for which there are no corresponding rows in a detail table
- rows in a detail table for which there are corresponding rows in a master table

For example, you might want to display:

- department names and their employees, but also include the department names that have no employees
- employee names and their departments, but also include the employee names that do not belong to a department

In SQL, the outer join is signified by the (+) symbol.

Discoverer includes outer joins in SQL:

- when explicitly defined in Discoverer Administrator  
For more information, see the "[Join Options dialog](#)".
- automatically under some circumstances  
For example, Discoverer automatically creates outer joins in the SQL for end user queries that contain conditions.

When running a query that contains a condition, users will sometimes want the results to:

- include values from one table that have no corresponding values in a table to which it is joined by an outer join
- not include values from one table that have no corresponding values in a table to which it is joined by an outer join

The DisableAutoOuterJoinsOnFilters registry setting enables you to disable the use of automatically generated outer joins when conditions are used in end user queries.

**Table 12–2 Summary of the examples that follow**

Example No.	Condition applied?	Value of DisableAutoOuterJoinsOnFilters	All values displayed
Example 1	No	0 or 1	Yes
Example 2	Yes	0	No
Example 3	Yes	1	Yes

The following examples illustrate how outer joins, conditions, and the value of the DisableAutoOuterJoinsOnFilters registry setting can affect the rows of data returned from an end user query.

For more information about Discoverer registry settings, see [Chapter 22, "Discoverer registry settings"](#).

### Example 1: No condition applied

This example illustrates the results returned when you execute a query against two tables, where the master and detail tables are joined with an outer join.

Discoverer displays:

- rows of data from the master table (dept) and detail table (emp)
- rows of data from the master table (dept) where no data exists for the detail table (emp)

The query is defined using the following SQL statement, where the outer join is signified by the (+) symbol:

```
select dname, ename, job from dept, emp where dept.deptno = emp.deptno(+);
```

DNAME	ENAME	JOB
SALES	GRIMES	DIRECTOR
SALES	PETERS	MANAGER
SALES	SCOTT	CLERK
SUPPORT	MAJOR	MANAGER

DNAME	ENAME	JOB
SUPPORT	SCOTT	CLERK
ADMIN		
MARKETING		
DISTRIBUTION		

The results returned from the query above will not change whether you switch the DisableAutoOuterJoinsOnFilters registry setting on or off.

### Example 2: Condition applied to query and DisableAutoOuterJoinsOnFilters set to 1 (switched off)

This example applies a condition to the query in Example 1 and the DisableAutoOuterJoinsOnFilters registry setting is switched off.

Discoverer displays:

- the data specified in the condition

Discoverer does not display:

- master rows for which there is no detail data

The following SQL statement is used, where the outer join is signified by the (+) symbol:

```
select dname, ename, job from dept, emp where dept.deptno =
emp.deptno(+) and job = 'CLERK';
```

DNAME	ENAME	JOB
SALES	SCOTT	CLERK
SUPPORT	SCOTT	CLERK

### Example 3: Condition applied to query and DisableAutoOuterJoinsOnFilters set to 0 (switched on)

This example applies a condition to the query in Example 1 and the DisableAutoOuterJoinsOnFilters registry setting is switched on.

Discoverer displays:

- the data specified in the condition
- master rows for which there is no detail data (Null values)

The following SQL statement is used, where the outer join is signified by the (+) symbol:

```
select dname, ename, job from dept, emp where dept.deptno = emp.deptno(+) and job = 'CLERK';
```

DNAME	ENAME	JOB
SALES	SCOTT	CLERK
SUPPORT	SCOTT	CLERK
ADMIN		
MARKETING		
DISTRIBUTION		

### Notes

The database supports placing outer joins in IS NULL and IS NOT NULL clauses, but does not support placing outer joins in IN and OR clauses.

## How to create row level security using a mandatory condition

You might want to restrict the data that end users can see in Discoverer workbooks.

For example, you have a single table with profit data for all regions. Each row of profit data applies to a transaction in a single region. You would like a manager in the West region to only access the rows with profit data for the West region.

REGION	PROFIT	DATE
East	\$100	8/7
West	\$50	8/7
South	\$65	8/10
North	\$100	8/6

To create row level security you must complete the following tasks:

- ["Load the ALL\\_USERS table from the SYS view into the business area that contains the folder in which you want to apply row level security"](#)

- "Create a new calculated item in the folder where you want to apply row level security"
- "Apply the list of values from the Username item (in the ALL\_USERS table) to the new calculated item"
- "Create a mandatory advanced condition to define row level security in a folder for specified database users"

**Load the ALL\_USERS table from the SYS view into the business area that contains the folder in which you want to apply row level security**

This task enables you to obtain a list of all the database users to which you can subsequently apply conditions and achieve row level security.

To load the ALL\_USERS table into the business area where you want to apply row level security:

1. Select the business area that contains the folder in which you want to create row level security.
2. Choose Insert | Folder | From Database to display the "Load Wizard: Step 1 dialog".
3. Select the **Online dictionary** check box and click Next to display the "Load Wizard: Step 2 dialog".
4. Select the SYS user from the **Select the users you want to load** list box and click Next to display the "Load Wizard: Step 3 dialog".

The SYS user contains a view that holds the names of all database users.

5. Expand the SYS user in the **Available** list box and drag the ALL\_USERS view into the **Selected** list box and click Next to display the "Load Wizard: Step 4 dialog".

This loads the ALL\_USERS view into the current business area. The ALL\_USERS view contains the names of all database user accounts.

6. Select the **List of values for items of type** check box and the **Character** check box, leaving all the other check boxes in this area cleared.

This will create a list of values of the names of all the database users.

7. Click Finish.

This loads the ALL\_USERS view from the SYS table into the current business area.

8. (optional) Edit the folder properties of ALL\_USERS and set the **Visible to user** property to 'No' (for more information about how to edit folder properties, see ["How to edit folder properties"](#)).

This makes sure that Discoverer does not display the ALL\_USERS folder to end users.

### **Create a new calculated item in the folder where you want to apply row level security**

You create a calculated item so that you can subsequently apply the list of values item class of all the database users from the SYS table.

To create a calculated item in the folder where you want to apply row level security:

1. Highlight the folder in which you want to create row level security (e.g. the Video Analysis folder).
2. Choose Insert | Item.
3. Type 'Username' into the **Name** field.
4. Type 'USER' into the **Calculation** field.
5. Click OK to create the new calculated item.

### **Apply the list of values from the Username item (in the ALL\_USERS table) to the new calculated item**

To apply the list of values item class to the calculated item created in the previous task:

1. Highlight the folder in which you want to apply row level security (e.g. the Video Analysis folder).
2. Click Insert | Item Class to display the ["Item Class Wizard dialog"](#).
3. Select **List of values** check box and click Next to display the ["Item Class Wizard: Step 2"](#).
4. Select the Username item from the All Users table that you loaded previously into the business area and click Next to display the ["Item Class Wizard: Step 3"](#).
5. Select the calculated item 'Username' (that you created in the previous step) from the **Available items:** list and drag it into the **Selected** list.
6. Click Finish to apply the list of values to the calculated item 'Username'.



## Create a mandatory advanced condition to define row level security in a folder for specified database users

You create a mandatory advanced condition so that you can apply data conditions to specified database users.

You must create a mandatory advanced condition that includes both:

- a condition statement defining the database user(s)
- one or more condition statements restricting data access to the specified database user(s)

To create a mandatory advanced condition to define row level security for the specified database user(s):

1. Highlight the folder in which you want to create row level security.
2. Choose Insert | Condition to display the "New Condition dialog".
3. (optional) Enter a description for the new condition.
4. Click the **Type** drop down list and select Mandatory.

The Type 'Mandatory' specifies that a condition always applies to end users.

5. Click the **Item** drop down list and select the calculated item 'Username'.
6. Click the **Values** drop down list and choose **Select Multiple Values** to display the Values dialog.
7. Select a check box for each database user that you want row level security to apply then click OK.

Discoverer displays the selected database user(s) in the **Values** field.

**Note:** You have now created a mandatory simple condition specifying the names of one or more database users. However, before you can apply row level security to the database user(s) in the current folder, you must specify the data conditions that you want to apply to the specified database user(s).

The remaining steps describe how you can apply row level security to the specified database user(s) so that they can see only data from the West region.

8. Click the Advanced button and then the Add button.

This enables you to add a new condition statement to the current condition and specify a data condition to apply to the specified database user(s).

9. (example) Click the **Item** drop down list and select Store.Region.

This data condition will be applied to the specified database user(s).

10. (example) Click the **Values** drop down list and select the region West.

**Note:** The Username and Region condition statements must be grouped together using the AND clause in order to associate the database user(s) (Username) with the data condition (Region).

Each Username/ data condition statement must group using the AND clause. Pairs of Username/ data condition statements, must group together with other pairs using the OR clause. By grouping the pairs of Username/ data condition statements using the OR clause ensures that each condition statement pair can be applied (see figure below).

**Figure 12–3 Condition where one group of database users sees data from the 'West' region and the other group sees data from the 'East' region.**

Name: (Username IN ('ADMINTUTOR','ADMINTUTORNF','NICK') AND Region = 'West' OR Username IN ('ADMTEST','BUG4','BUGOUT4130NF') AND Region = 'East')

Generate name automatically

Description: 3 users can see data for the 'West' region, 3 other users can see data for the 'East' region.

Location: Video Analysis Information Type: Mandatory

Formula

Group	Group	Item	Condition	Value(s)
OR	AND	Username	IN	'ADMINTUTOR', 'ADMINTUTORNF', 'NICK'
		Region	=	'West'
	AND	Username	IN	'ADMTEST', 'BUG4', 'BUGOUT4130NF'
		Region	=	'East'

Match case

{ Username IN ('ADMINTUTOR','ADMINTUTORNF','NICK') AND Region = 'West' OR Username IN ('ADMTEST','BUG4','BUGOUT4130NF') AND Region = 'East' }

OK Cancel Help

11. Click Ok

This creates a mandatory advanced condition that applies row level security to the database user(s) specified (i.e. binding a group of users either to the West or the East region). In the example above, the database user 'ADMTEST' can view data from the West region only.

12. (optional) Edit the Properties of the new condition and set the **Visible to user** property to 'No' (for more information about editing condition properties, see ["How to edit condition properties"](#)).

This ensures that Discoverer does not display the condition to end users, but it is always enforced.

## How to enable summary folders if a source folder includes a mandatory condition (e.g. with row level security)

When you create a mandatory condition in a folder, database user queries must not use a summary folder that is based upon the folder that contains the mandatory condition. This is because the data in the summary table will be only for the database user that created the summary folder.

To enable database user queries to use summary folders where the source folders use mandatory conditions (e.g. with row level security), you must carry out the following steps before you create the mandatory condition.

To enable summary folders for database user queries where the source folders contain a mandatory condition:

1. Create a summary folder based upon folders where no mandatory condition (e.g. row level security) has yet been set up.

For more information about creating summary folders, see [Chapter 14, "Managing summary folders"](#) and [Chapter 15, "Creating summary folders manually"](#).

2. Set the summary property **Available for Queries** to 'No'.

This summary folder references data for the database user that created it. You must set this property to 'No' to prevent end user queries from accessing this summary folder.

3. (optional) Set the summary folder properties **Next Refresh** and **Refresh Interval** to suitable values.

For more information, see the ["Summary Properties dialog"](#).

4. Create a database view against your summary folder.

Ask your database administrator for more information as this is done outside Discoverer.

Use a WHERE clause to apply the mandatory condition (e.g. row level security) to the view just created.

For example:

```
SQL> WHERE Userid='SMITH' AND Region='WEST'
```

5. Register the view in Discoverer as an external summary.

For more information, see [Chapter 15, "How to create summary folders based on external summary tables"](#).

6. Set the summary property **Available for Queries** to 'Yes'.

You must set this property to 'Yes' to enable database users to access this summary folder.

The **Next Refresh** and **Refresh Interval** summary folder properties should be set to 'Never' in Discoverer.

For more information, see the ["Summary Properties dialog"](#).

7. Create the required mandatory condition (e.g. row level security) in a folder in Discoverer Administrator (for more information, see ["How to create row level security using a mandatory condition"](#)).

## Notes

You cannot use analytic functions in external summary folders (for more information about analytic functions, see ["analytic functions"](#)).

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## Creating and maintaining hierarchies

### Creating and maintaining hierarchies

This chapter explains how to implement and maintain hierarchies using Discoverer Administrator, and contains the following topics:

- "What are hierarchies?"
- "What are item hierarchies?"
- "What are date hierarchies?"
- "How to create item hierarchies"
- "How to create date hierarchies and templates"
- "How to edit item hierarchies"
- "How to edit date hierarchy templates"
- "How to apply a date hierarchy template to a date item"
- "How to set the default date hierarchy template"
- "How to delete item hierarchies or date hierarchy templates"
- "How to modify default date hierarchies that use date format 'RR' following upgrade to Oracle9i Discoverer Administrator"

### What are hierarchies?

Hierarchies are default drill paths between items that you define in Discoverer Administrator. You create hierarchies between items in a business area to provide Discoverer end users with a default drill hierarchy.

There are two kinds of hierarchy:

- item hierarchies
- date hierarchies

Discoverer end users can use hierarchies to:

- drill up to a more general level of detail (e.g. Store to City to Region to Country)
- drill down to a finer level of detail (e.g. Country to Region to City to Store)

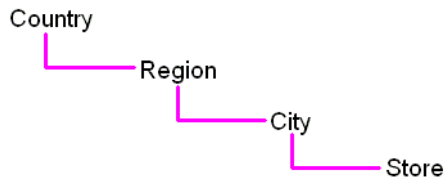
Hierarchies can link items in a business area where no relationship is defined in the database. For more information about business areas, see [Chapter 4, "What are business areas?"](#).

## What are item hierarchies?

Item hierarchies are relationships between items other than dates.

An example of an item hierarchy:

**Figure 13–1 Sales item hierarchy**

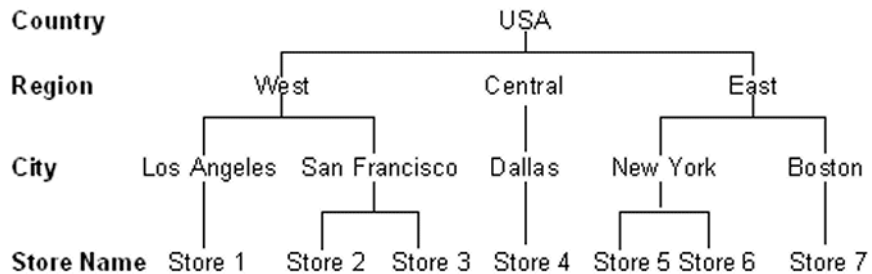


The Sales item hierarchy links a country with its regions, cities and stores.

To use this hierarchy a Discoverer end user could use a report that shows sales from a country perspective. The Discoverer end user could then drill down from country to see sales per region, sales per city or sales per store, and then drill back up to the country level.

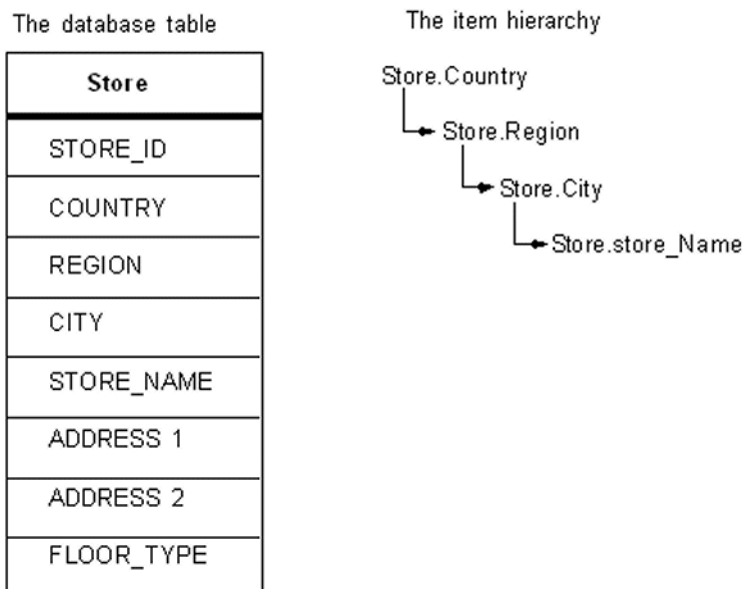
The Sales item hierarchy from a Discoverer end user perspective is shown below.

**Figure 13–2 Sales item hierarchy - Discoverer end user perspective**



The figure below shows the Sales item hierarchy from a database perspective.

**Figure 13–3 Sales item hierarchy - database perspective**



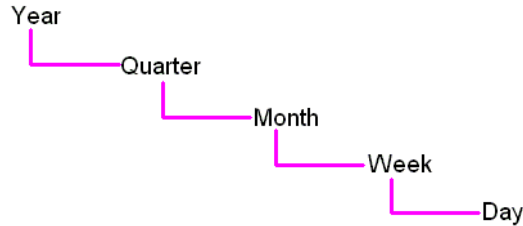
Note that you do not have to specify that Los Angeles is in the West. You only have to specify that City is under Region in your item hierarchy.

## What are date hierarchies?

Date hierarchies are relationships between date items.

An example of a date hierarchy:

**Figure 13–4 Sales date hierarchy**

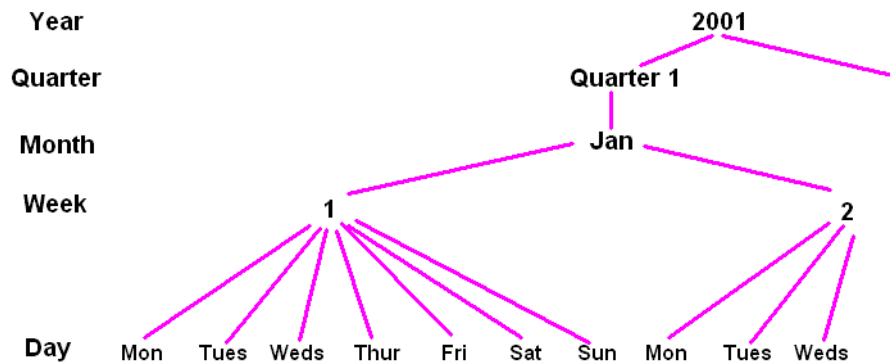


The Sales date hierarchy links a year with its quarters, months, weeks and days.

To use this hierarchy a Discoverer end user could use a report that shows total sales for each year. The Discoverer end user could then drill down from year to show sales per quarter, sales per month, sales per week and the sales per day, and then drill back up to sales per year.

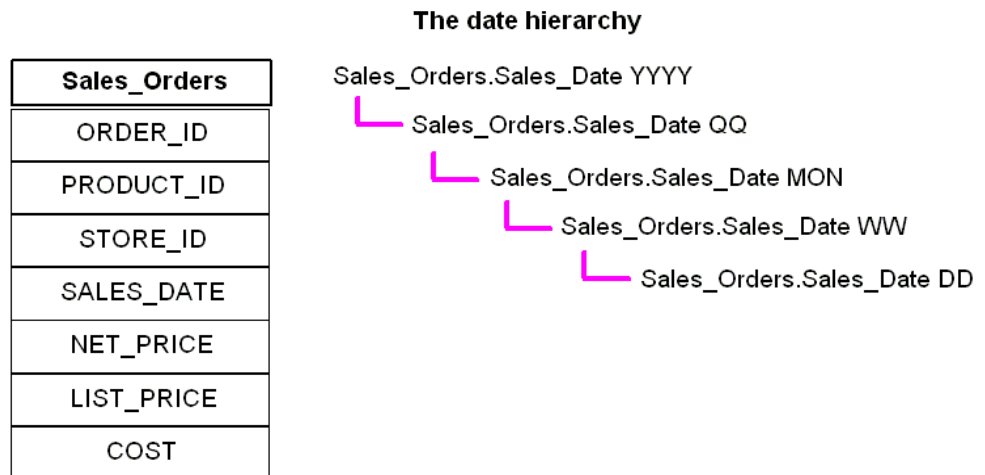
A section of the Sales date hierarchy from a Discoverer end user perspective is shown below.

**Figure 13–5 Sales date hierarchy - Discoverer end user perspective**



The figure below shows the Sales date hierarchy from a database perspective.



**Figure 13–6 Sample date hierarchy - database perspective**

**Note:** Each level in the date hierarchy is a calculation based on the Sales\_Orders.SALES\_DATE column. The calculations are produced by a date hierarchy template (for more information, see "[What are date hierarchy templates?](#)").

## What are date hierarchy templates?

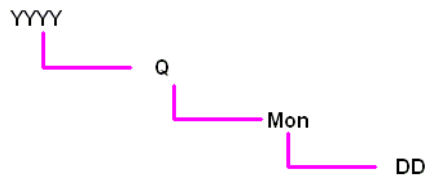
Date hierarchy templates enable you to define a date hierarchy that you can apply to date items. A date item uses information that specifies the date, month, year and time. Discoverer uses this information to calculate for example, quarter, week and days of the week. A date hierarchy template automatically creates items based on a date item, for example to represent the year or month

You will find it more efficient to re-use a date hierarchy template by applying it to date items rather than redefining the same date hierarchy repeatedly for each date item.

You can use the date hierarchy templates (supplied with Discoverer Administrator) to define many common date hierarchies, or you can create your own customized date hierarchies.

Discoverer Administrator includes a default date hierarchy template (see the Date hierarchy template figure below) that enables you to drill from year to quarter to month to day:

**Figure 13-7 Date hierarchy template**



## About date hierarchies and performance

If you apply a date hierarchy to a date item from an indexed table, a query that includes one of these date items will not use the indexes (which can reduce performance). You can optimize performance in Discoverer Plus by applying date hierarchies to date items from tables that do not rely on indexes.

### Example of how a date hierarchy can affect performance in Discoverer Plus

When you load a large fact table (i.e. a table with many rows) that contains a date column (e.g. `transaction_date`) Discoverer applies the default date hierarchy to the date item (for more information, see ["Load Wizard: Step 4 dialog"](#)).

Discoverer creates a folder containing date items such as Year, Quarter and Month using the `EUL_DATE_TRUNC` function (for more information, see [Chapter 9, "About truncating date items and the EUL\\_DATE\\_TRUNC function"](#)). When a Discoverer end user runs queries that include these items, any indexes that include the date item in the fact table are not used. Where indexes are not used, performance can be affected.

It is recommended therefore that you do not apply date hierarchies to date items in folders based on fact tables, as fact tables are likely to have indexes.

### Example of how performance can be retained

To retain performance you should apply date hierarchies to a separate dimension table.

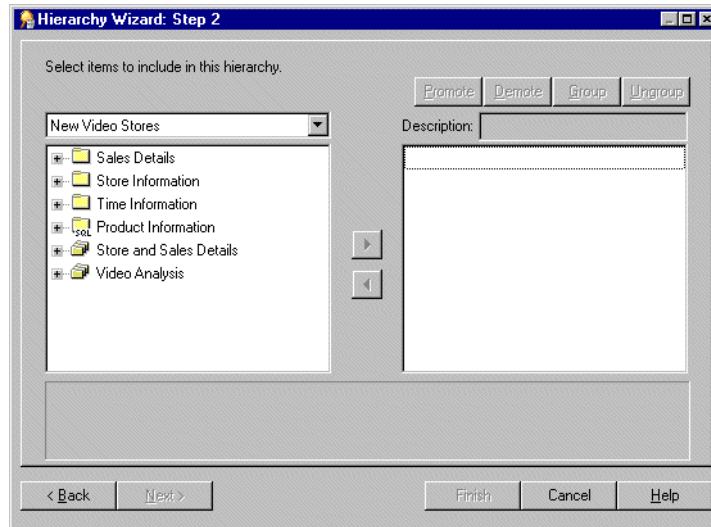
For example, a `transaction_date` item in a fact table might join to another dimension table (e.g. Time Period) that specifies time periods. You can load this dimension table using the Load Wizard and apply date hierarchies to it. You can then create a complex folder containing items from both the dimension and fact tables, including the items created by the date hierarchy such as Year or Quarter. When a Discoverer end user uses queries that include date hierarchy items Discoverer can use the date column indexes on the fact table. This can considerably improve performance.

## How to create item hierarchies

To create an item hierarchy:

1. Choose Insert | Hierarchy to display the "Hierarchy Wizard dialog".
2. Select the Item Hierarchy radio button and click Next to display the "Edit Hierarchy dialog: Items tab".

**Figure 13–8 Hierarchy Wizard: Step 2**



Here you select which items to use in this item hierarchy.

3. Move the items that you want to include in this item hierarchy from the list on the left to the list on the right.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

**Note:** The order of items in the hierarchy list determines the drill down sequence that the Discoverer end user will use to analyze the data. The item hierarchy is arranged in the order that you include the items. For example, Region - City - Store.

**Note:** You can select items from multiple folders but the folders must be joined. If the folders are joined with more than one join, Discoverer will prompt you with the Choose Join dialog to select the correct join to use.

4. (optional) To move an item in the hierarchy to a different position, select the item in the right-hand list and click:
  - Promote to move the item higher in the hierarchy
  - Demote to move the item lower in the hierarchy
5. (optional) To group two or more items so that they appear on the same level of the hierarchy, select the items and click Group (for more information, see "[Hierarchy Wizard: Step 2](#)").

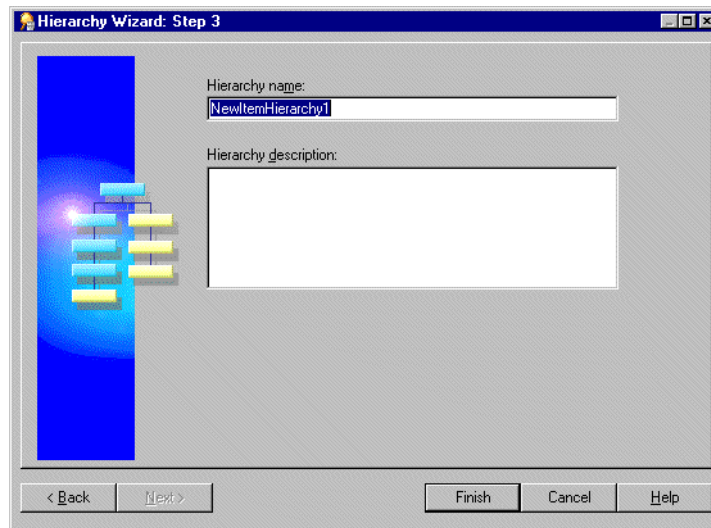
You can select more than one item at a time by holding down the Ctrl key and clicking another item.

**Note:** To ungroup a group of items in the hierarchy, select the group and click Ungroup.

6. (optional) To rename an item, click on the item in the right hand list and specify a name in the **Description** field.

The description you specify is the label the user sees in Discoverer Plus. If you don't specify a name, by default each level of the item hierarchy uses the item name.

7. Click Next to open the "[Hierarchy Wizard: Step 3](#)".

**Figure 13–9 Hierarchy Wizard: Step 3**

8. Specify a name and description for the new item hierarchy.
9. Click Finish to create the item hierarchy.

Discoverer displays the item hierarchy in the Hierarchies tab of the Workarea.

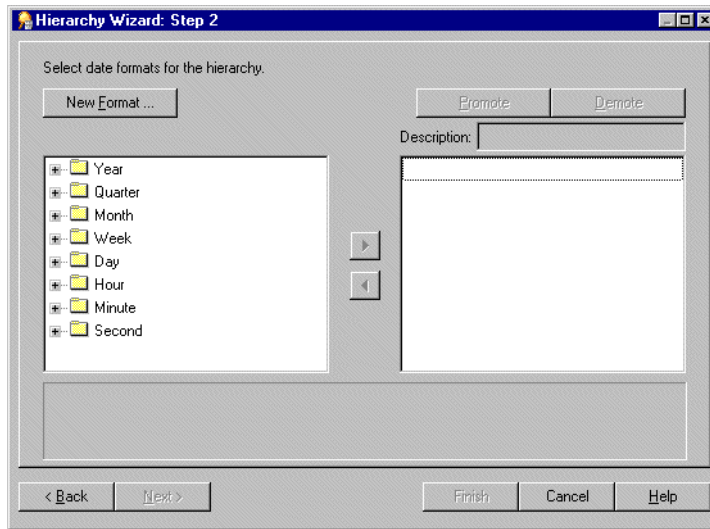
## How to create date hierarchies and templates

**Note:** You can create date hierarchies only if you use an Oracle database.

To create a date hierarchy:

1. Choose Insert | Hierarchy to display the "Hierarchy Wizard dialog".
2. Select the Date Hierarchy option and click Next to open the "Hierarchy Wizard: Step 2".

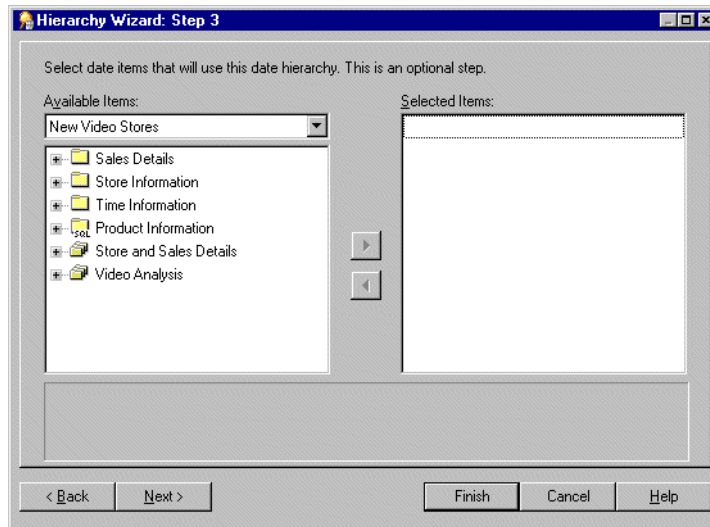
**Figure 13–10 Hierarchy Wizard: Step 2**



3. (optional) To create a new date format click New Format... to display the "New Date Format dialog".
4. Move the date formats to include in this date hierarchy from the list on the left to the list on the right.  

You can select more than one date format at a time by holding down the Ctrl key and clicking another date format.
5. (optional) To move a date format in the hierarchy to a different position, select the date format in the list on the right and click:
  - Promote to move the date format higher in the hierarchy
  - Demote to move the date format lower in the hierarchy
6. (optional) To rename a date format, click on the date format in the list on the right and specify the new name in the **Description** field.  

The description you specify is the label the user sees in Discoverer Plus.
7. Click Next to display the "Hierarchy Wizard: Step 3".

**Figure 13–11 Hierarchy Wizard: Step 3**

Here you select which date items will use this date hierarchy.

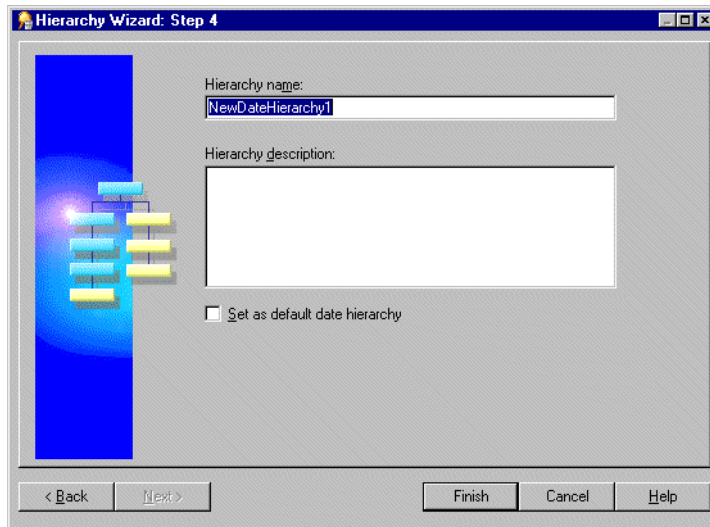
8. Move the date items that will use this date hierarchy from the **Available Items** list to the **Selected Items** list.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

**Hint:** To create just a date hierarchy template, do not select any date items on this page. Later, you can apply this template to date items by modifying their item properties (for more information, see ["How to apply a date hierarchy template to a date item"](#)).

9. Click Next to open the ["Hierarchy Wizard: Step 4"](#).

Figure 13–12 Hierarchy Wizard: Step 4



10. Specify a name and description for the new date hierarchy.
11. (optional) To make this date hierarchy template the default, select the **Set as default date hierarchy** check box.

If you select the **Set as default date hierarchy** check box, the date hierarchy template is displayed as the default in the Load Wizard: Step 4 under the **Automatically generate**: option. For more information, see "[Load Wizard: Step 4 dialog](#)".
12. Click Finish to create the date hierarchy and apply it to the date items that you selected in the Hierarchy Wizard: Step 4 dialog.

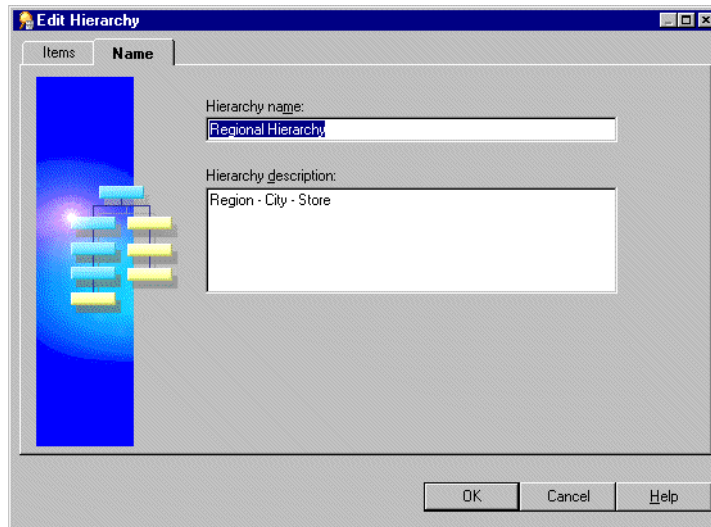
The date hierarchies and the date hierarchy template now appear on the "[Workarea: Hierarchies tab](#)".

## How to edit item hierarchies

To edit an existing item hierarchy:

1. Select a hierarchy on the Hierarchies tab and choose Edit | Edit...to display the "[Edit Hierarchy dialog: Name tab](#)".



**Figure 13–13 Edit Hierarchy dialog: Name tab**

2. Edit the Hierarchy as required.

The Edit Hierarchy dialog is divided into two tabs.

- Items  
Use this tab to add or remove the items that use this hierarchy.
- Name  
Use this tab to edit the hierarchy's name and description.

For more information about the above tabs see "[Edit Hierarchy dialog: Items tab](#)" or "[Edit Hierarchy dialog: Name tab](#)".

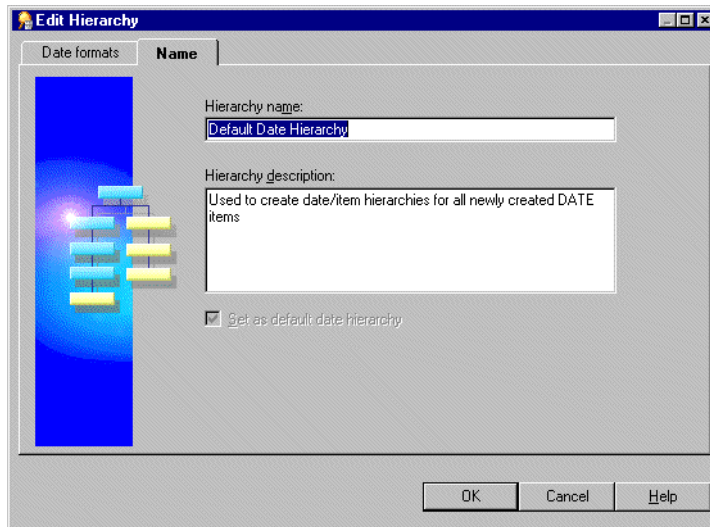
3. Click OK.

## How to edit date hierarchy templates

This section describes how to edit an existing date hierarchy template. When you edit a date hierarchy template, all date items that use the date hierarchy template are modified to reflect the changes.

1. Click the date hierarchy template on the Hierarchies page and choose Edit | Edit... to display the "[Edit Hierarchy dialog: Name tab](#)".

**Figure 13–14 Edit Hierarchy dialog: Name tab**



2. Edit the hierarchy as required.

The Edit Hierarchy dialog is divided in to two tabs:

- Date formats

Use this tab to change the date formats and their position in this date hierarchy template.

- Name

Use this tab to edit the date hierarchy template's name and description.

For more information about the above tabs see "[Edit Hierarchy dialog: Date formats tab](#)" or "[Edit Hierarchy dialog: Name tab](#)".

3. Click OK.

## How to apply a date hierarchy template to a date item

This section describes how to apply a date hierarchy template to an existing date item.

When you apply a date hierarchy template to an existing date item, Discoverer Administrator automatically creates all the date items that are required to complete the date hierarchy. These new date items appear in the same folder as the original

date item (prefixed with the name of the original date item). If you change the date hierarchy template that is applied to a date item, Discoverer creates new date items to reflect the new date hierarchy template. However Discoverer does not remove the date items from the previous date hierarchy. If you want to remove date items from a previous date hierarchy you must remove them manually.

For example, if you create the date hierarchy YY/QQ/MM and assign it to the date item Transaction Date, Discoverer creates the following items in the folder:

- Transaction Date YY
- Transaction Date QQ
- Transaction Date MM

If you then create a new date hierarchy WW/DD and assign it to Transaction Date, Discoverer creates the following additional items in the folder:

- Transaction Date WW
- Transaction Date DD

Discoverer does not delete the other three date items created previously.

To apply a date hierarchy template to a date item:

1. Click the date item on the Data tab and choose Edit | Properties to display the ["Item Properties dialog"](#).

**Hint:** To apply a single date hierarchy template to more than one date item at a time, select all the date items before opening the Properties dialog. For more information, see [Chapter 9, "How to edit item properties"](#).

2. Select the date hierarchy template for this date item to use from the drop-down list in the **Date Hierarchy** field.

Select None to make the date item not use a date hierarchy template.

3. Click OK.

## How to set the default date hierarchy template

The default date hierarchy template is displayed as the default selection in the Load Wizard step 4 in the **Date hierarchies, using:** drop-down list. For more information see ["Load Wizard: Step 4 dialog"](#).

To set the default date hierarchy template:

1. Expand the Date hierarchy templates on the "[Workarea: Hierarchies tab](#)" to display all the date hierarchy templates.
2. Select the date hierarchy template you want to set as the default.
3. Choose Edit | Edit...to display the "[Edit Hierarchy dialog: Name tab](#)".
4. Select the **Set as default date hierarchy** check box on the Name tab.
5. Click OK.

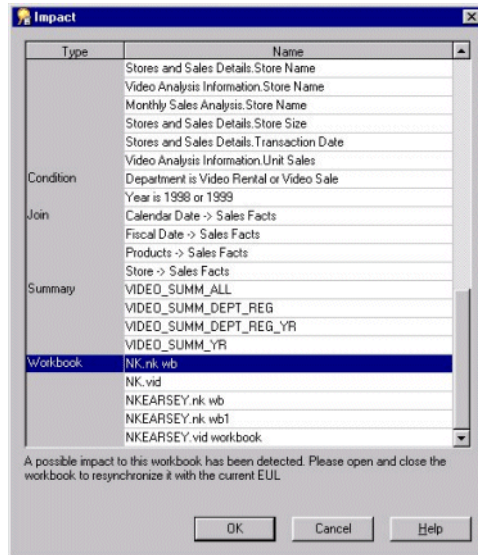
## How to delete item hierarchies or date hierarchy templates

To delete item hierarchies or date hierarchy templates:

1. Select the item hierarchy or date hierarchy template on the "[Workarea: Hierarchies tab](#)".  

You can select more than one hierarchy at a time by holding down the Ctrl key and clicking another hierarchy.
2. Choose Edit | Delete to open the "[Confirm Delete dialog](#)".
3. (optional) You can review the objects that might be affected by deleting this hierarchy or hierarchy template. To see the potential impact of the deletion:
  - a. Click Impact to display the "[Impact dialog](#)".  

The Impact dialog shows other objects that might be affected by the deletion and helps you to make the right choice.
  - b. (optional) Select a row to view text indicating what affect the current action will have on the EUL object.

**Figure 13–15** *The Impact dialog*

- c. When you have finished reviewing the impact of deleting the hierarchy or hierarchy template, click OK to close the Impact dialog.
4. Click Yes to delete the selected hierarchies or hierarchy templates.

## How to modify default date hierarchies that use date format 'RR' following upgrade to Oracle9i Discoverer Administrator

After upgrading to Oracle9i Discoverer Administrator, if a date format in a default date hierarchy uses the date format 'RR' you must modify it to 'YYYY' and then remove any affected date items (i.e. date items that use the 'RR' date format) from the business area. This action is necessary to ensure that materialized views can be successfully created (for more information about materialized views, see [Chapter 14, "What are materialized views?"](#)).

To modify a default date hierarchy that uses the date format 'RR' so that it uses 'YYYY' you must complete the following tasks:

- ["Modify default date hierarchy replacing the date format 'RR' with 'YYYY'"](#)
- ["Remove remaining date items that use the date format 'RR'"](#)

### Modify default date hierarchy replacing the date format 'RR' with 'YYYY'

To modify a default date hierarchy to use the date format 'YYYY':

1. Click the ["Workarea: Hierarchies tab"](#).
2. Expand **Date hierarchy templates** then highlight the default date hierarchy that uses the date format 'RR'.
3. Choose Edit | Edit... to display the ["Edit Hierarchy dialog: Date formats tab"](#).
4. Replace each 'RR' date format with a 'YYYY' date format.  
**Note:** Repeat the above steps for each affected default date hierarchy.
5. Click OK to save your changes.

Once you have applied the 'YYYY' format to the affected default date hierarchy, you can remove remaining date items that use the date format 'RR'.

### Remove remaining date items that use the date format 'RR'

To remove date items that use the date format 'RR':

1. Click the ["Workarea: Data tab"](#).
2. Highlight a date item that uses the date format 'RR'.
3. Choose Edit | Delete to delete the affected date item.
4. Repeat the above steps for each date item that still uses the date format 'RR'.

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## Managing summary folders

### Managing summary folders

This chapter explains summary folders and how you manage them using Discoverer Administrator, and contains the following topics:

- "About folders and summary folders in Discoverer"
- "What are summary folders?"
- "What are Discoverer summary tables?"
- "What are materialized views?"
- "What is Automated Summary Management (ASM)"
- "How does ASM work?"
- "What are the prerequisites for creating summary folders with ASM?"
- "What are the different ways to run ASM and when do you use them?"
- "What is the ASM policy?"
- "Why must you refresh summary data?"
- "What happens when a summary folder is refreshed?"
- "How to run ASM using the Summary Wizard"
- "How to run ASM after bulk load using the Load Wizard"
- "How to run ASM using the command line interface"
- "How to run ASM using a batch file and the operating system scheduler"
- "How to configure the database for summary folders"

## About folders and summary folders in Discoverer

Discoverer uses two kinds of folders:

- folders - represent data

Discoverer folders are classified as simple, complex, or custom. For more information, see [Chapter 5, "What are folders?"](#).

- summary folders - represent data that has been queried and the results saved for reuse

Discoverer uses summary folders to improve query response times for end users.

## What are summary folders?

Summary folders are a representation of queried data (created in Discoverer Administrator) that has been saved for reuse. The data is stored in the database in one of the following (depending on the version of Oracle):

- materialized views

Discoverer uses materialized views to store summarized data in Oracle 8.1.7 databases or later.

- tables

Discoverer uses tables to store summarized data in Oracle 8.1.5 databases (or earlier).

The summary tables created by Discoverer are called Discoverer summary tables.

**Note:** Circumstances sometimes prohibit the creation of materialized views and result in the creation of Discoverer summary tables when running against Oracle 8.1.7 databases (and later). For more information, see [Chapter 16, "What is different between mapping external summary tables and views to EUL items, with Oracle 8.1.7 databases \(or later\)"](#).

Summary folders improve the response time of a query because the query accesses pre-aggregated and pre-joined data rather than going against the detail database tables.

You can also direct Discoverer to summary folders based on tables containing summary data that have been created by another application. These tables are known as



external summary tables. You can specify that Discoverer refreshes external summary tables.

You can create summary folders in one of two ways:

- using the Automated Summary Management (ASM) feature (for more information, see ["What is Automated Summary Management \(ASM\)"](#))
- manually (for more information, see ["What is manual summary folder creation?"](#))

The recommended method for creating summary folders in Discoverer is to use Automated Summary Management (ASM).

## What are Discoverer summary tables?

Discoverer summary tables are database tables that Discoverer Administrator creates that contain summarized data, when run against an Oracle 8.1.5 database (or earlier). Discoverer summary tables contain pre-aggregated and pre-joined data and can improve query performance in Discoverer Plus and Discoverer Viewer.

Discoverer automatically recognizes when a summary table can be used to satisfy a query request. Discoverer rewrites the query to use the summary table. For more information, see [Chapter 16, "What is query rewrite?"](#).

For example, when a query is run for the first time in Discoverer Plus it is directed against the detail tables. This may require a multiple table join and aggregation over thousands or millions of rows which could take some time to complete. Once Discoverer has created a suitable summary table, the same query run in Discoverer Plus is rewritten towards the summary table returning results in a few seconds. Both queries would produce the same results.

For more information about Discoverer and rewriting queries to summary tables with Oracle 8.1.5 databases (or earlier), see [Chapter 16, "Example illustrating the advantages of rewriting a query to use a summary table"](#).

## What are materialized views?

Materialized views are snapshot views that the Oracle 8.1.7 database (or later) creates that contain summarized data. Materialized views contain pre-aggregated and pre-joined data and can improve query performance in Discoverer Plus and Discoverer Viewer.

The Oracle 8.1.7 database (or later) automatically recognizes when a materialized view can be used to satisfy a query request. The Oracle 8.1.7 database (or later) rewrites the query to use the materialized view. Queries are then directed to the materialized view and not to the underlying detail tables or views.

Materialized views have the following characteristics:

- Materialized views consume storage space  
Unlike ordinary views, materialized views contain data resulting from a query against one or more detail tables.
- Materialized views must be refreshed when data changes  
The Oracle database maintains the data in materialized views by refreshing them after changes are made to the detail tables. The refresh method can be incremental (fast refresh) or complete. Materialized views can be refreshed either on demand or at regular time intervals. Alternatively a materialized view in the same database as the detail tables can be refreshed whenever a transaction commits its changes to the detail tables.
- Materialized views are transparent to users  
Query rewrite transforms a SQL statement expressed in terms of the detail table into a statement accessing one or more materialized views that are defined on the detail tables. The transformation is transparent to the users. For more information, see [Chapter 16, "What is query rewrite?"](#).

Note that you do not need to register external materialized views with Discoverer for end user queries to use them. This is because the Oracle 8.1.7 database (and later) knows whether a materialized view can satisfy an end user query. The only reason that you need to register an external materialized view with Discoverer is if you want Discoverer to maintain the refresh for you (for more information about registering external summary tables/views, see [Chapter 15, "How to create summary folders based on external summary tables"](#)).

The SQL Inspector/Explain Plan in Discoverer Plus shows you whether the SQL generated to run a query used a summary table or a materialized view (for more information, see ["About viewing the SQL and execution plan for query rewrite in Discoverer"](#)).

For an historical context about Discoverer's use of summary tables/materialized views, see [Chapter 16, "What is the context and future for Discoverer's use of summary tables/materialized views?"](#).

For information about some of the differences between Discoverer summary tables and materialized views, see:

- Chapter 16, "What characteristics differ between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or later)?"
- Chapter 16, "What is different about summary folders that are based on external summary tables?"
- Chapter 16, "What is different between mapping external summary tables and views to EUL items, with Oracle 8.1.7 databases (or later)?"

## What is Automated Summary Management (ASM)

Automated Summary Management (ASM) is a Discoverer facility that creates and manages summary folders for you.

ASM simplifies the process of summary folder creation and maintenance by offering you a fully automated solution to summary folder management. When run periodically, ASM can automatically refine the summary folders it creates using query statistics gathered by Discoverer from user queries. ASM also provides guidance should you wish to control the specification of default values during summary folder creation/maintenance.

## How does ASM work?

ASM determines how to create summary folders by:

- analyzing your database tables
- using query statistics (when available)
- using default values known as the ASM policy (for more information, see ["What is the ASM policy?"](#))

ASM automatically creates and maintains the best set of summary folders based on the above combination.

ASM converts your summary policy into a list of recommended summary folder definitions. You can either implement these recommendations without further intervention (the actual set of summary tables dynamically adjusts with system usage) or execution can be stalled until you have specifically sanctioned one or more of the recommendations.

ASM requires table space to create summary folders but you can adjust how much space in the Summary Wizard (for more information, see ["How to run ASM using the Summary Wizard"](#)).

**Note:** ASM works on the EUL as a whole, not just the currently selected business areas. This means that ASM can use folders from all business areas in the current EUL.

## What are the prerequisites for creating summary folders with ASM?

To create summary folders with ASM, the following requirements must be met:

- The database must support PL/SQL.
- The DBMS\_JOB package must be installed for scheduling summary folder creation and refresh (for more information, see ["How to confirm that DBMS\\_JOB is installed for summary management"](#)).
- The User ID that you intend to use to create the summary folders must have the following database privileges (for more information, see ["How to grant the privileges needed to create summary folders"](#) for details about granting these privileges):
  - CREATE TABLE
  - CREATE VIEW
  - CREATE PROCEDURE
  - SELECT ON V\_\$PARAMETER
  - CREATE/DROP/ALTER ANY MATERIALIZED VIEW (Oracle 8.1.7 databases or later)
  - GLOBAL QUERY REWRITE (Oracle 8.1.7 databases or later)
  - ANALYZE ANY
- The User ID that you intend to use to create summary folders must have sufficient quota in the tablespace for the summary tables to be created (for more information, see ["How to determine and reset tablespace quotas"](#)).
- You must connect to Discoverer Administrator as the EUL owner.
- If you are using an Oracle 8.1.7 database (or higher), your folders must not contain SET operators (e.g. UNION, UNION ALL, MINUS, INTERSECT). If ASM finds a folder that contains a SET operator, summary data will not be created for that folder.

**Note:** For more information about Oracle SET operators, see the *Oracle 8i SQL Reference*.

**Note:** A database user created in Discoverer may need additional privileges to enable them to create summary folders. The conditions that determine when this is true are detailed in the following table:

**Table 14–1 Whether a database user created in Discoverer requires additional privileges to create summary folders?**

The version of Discoverer and/or database version under which the database user is created?	Does the database user require further privileges to create summary folders?	What action is required?
Discoverer 3.1.	Yes, the database user requires further privileges to create summary folders.	You must explicitly grant the required privileges to the database user (for more information about how to grant these privileges, see <a href="#">"How to grant the privileges needed to create summary folders"</a> ).
Discoverer 4i against an Oracle 8.0 database (or earlier).	Yes, the database user requires further privileges to create summary folders.	Same action as above.
Discoverer 4i against an Oracle 8.1.7 database (or later).	No, the database user requires no further privileges to create summary folders.	No action is required.

## What are the different ways to run ASM and when do you use them?

There are a number of ways that you can run ASM. The following table shows the different ways that you can run ASM and when to use them:

**Table 14–2 The different ways to run ASM and when you use them**

How to run ASM?	Why run ASM this way?	For information see
Using the Summary Wizard.	Discoverer leads you through the whole process.	<a href="#">"How to run ASM using the Summary Wizard"</a> .
Using the Load Wizard after bulk load.	Enables you to create summary folders during the load of a business area without having to access ASM independently.	<a href="#">"How to run ASM after bulk load using the Load Wizard"</a> .

**Table 14–2 The different ways to run ASM and when you use them**

How to run ASM?	Why run ASM this way?	For information see
Using the command line interface.	Enables you to create summary folders without having to start Discoverer.	<a href="#">"How to run ASM using the command line interface"</a> .
Using a batch file and the Operating System scheduler.	Automates the scheduling of ASM summary folder creation through the command line.	<a href="#">"How to run ASM using a batch file and the operating system scheduler"</a> .

## What is the ASM policy?

The ASM policy is a set of user defined constraints and options that enable you to control how ASM behaves and what summary folders it produces.

The ASM policy is divided into space options and advanced settings. In many cases you will only need to set the space options.

For more information about space options and advanced settings, see:

- ["Summary Wizard \(ASM\): Step 3 Allocate Space dialog"](#)
- ["Summary Wizard \(ASM\): Change default settings: List of dialog tabs"](#)

Discoverer provides default settings that ensure suitable summary folders are created and maintained without your intervention.

The minimum information required for an ASM policy is a tablespace name and an allocated amount of disc space. The tablespace defaults to the user tablespace, and a default amount of disc space is used. Both of these values can be changed if required (for more information, see ["Summary Wizard \(ASM\): Step 3 Allocate Space dialog"](#)).

## Why must you refresh summary data?

You must refresh summary data regularly to keep all of the summary tables and materialized views consistent. If the database changes often, summary tables and materialized views need to be refreshed accordingly to keep their data current with the underlying database. With a properly maintained set of summary tables or materialized views, query results are accurate, regardless of the table or materialized view being used.

For information about refreshing summary folders see:

- ["What happens when a summary folder is refreshed?"](#)

- [Chapter 15, "How to manually refresh a summary folder"](#)
- [Chapter 16, "About refresh options for Oracle 8.1.7 databases \(or later\)"](#)
- [Chapter 16, "About refreshing summary folders following import between Oracle databases"](#)

**Note:** Sometimes it is useful to refresh a summary folder after some external event has completed (e.g. the loading of data into a warehouse). You can use the Discoverer command line interface facility to refresh a summary folder from a batch command file to do this (for more information, see "[Discoverer command line interface](#)").

## What happens when a summary folder is refreshed?

When a summary folder is refreshed (when running against Oracle 8.1.7 databases and later), the database server's own refresh mechanism is used (this can be an incremental refresh) depending on your refresh settings.

Whenever a summary folder is refreshed, the following actions are performed by Discoverer:

- The summary folder is marked as unavailable.
- The materialized view or summary table associated with summary folder is reconciled against its EUL metadata and if necessary the definition is updated.
- All existing summary data that is about to be refreshed is deleted.
- The summary data is regenerated and inserted into the corresponding materialized views or summary tables.
- The summary folder is marked as available.

## How to run ASM using the Summary Wizard

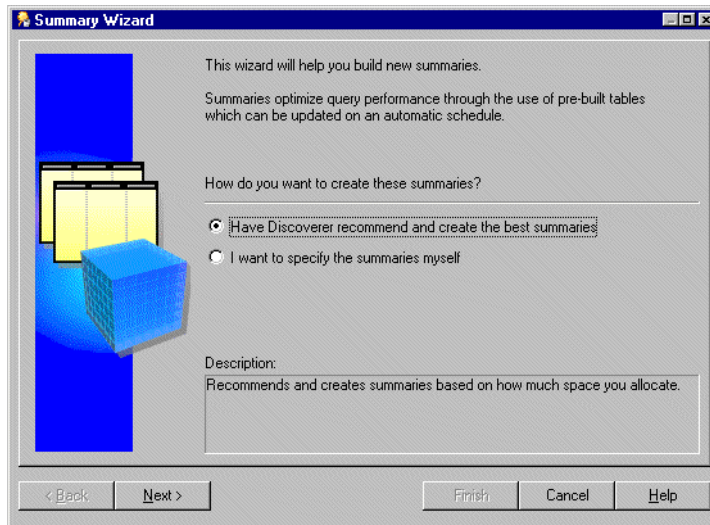
You need certain database privileges to run ASM (for more information about the privileges required to run ASM, see "[What are the prerequisites for creating summary folders with ASM?](#)").

To see a list of headings that point to more information about the Summary Wizard dialogs, see "[Summary Wizard \(ASM\): List of dialogs](#)".

To start the summary wizard:

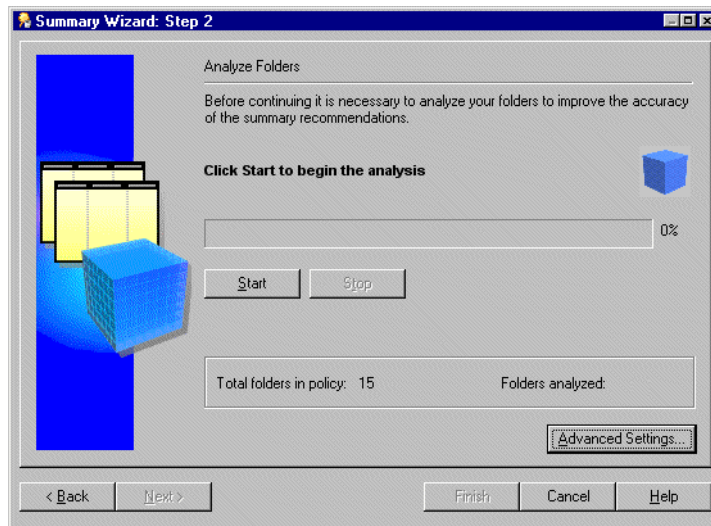
1. Choose Insert | Summary to display the "[Summary Wizard: Step 1 dialog](#)".

**Figure 14–1 Summary Wizard**



2. Select the **Have Discoverer recommend and create the best summaries** radio button and click Next to display the "Summary Wizard: Step 2 dialog".

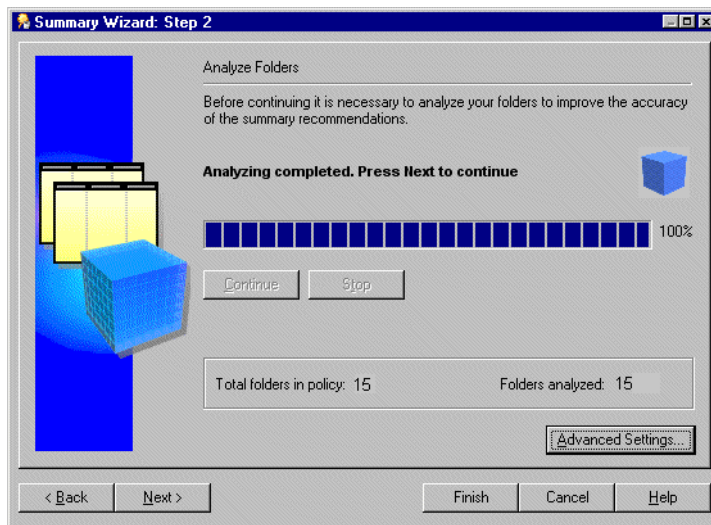


**Figure 14–2 Summary Wizard: Step 2 dialog**

**Note:** To determine which summary folders to create Discoverer analyzes every folder that is to be involved in the summary folder process. Depending on the number and size of folders to be analyzed this could take some time to complete. Discoverer allows you to start and stop this process at your own pace.

3. Click the Start button to begin the analysis:  
Your progress will be displayed during the analyze process.
4. (optional) Click the Stop button to pause the analysis.
  - You might want to pause the analysis to make changes to the default settings (using the Advanced Settings button) before resuming table analysis.
5. (optional) Click the Continue button to resume the analysis.  
The analysis always resumes from exactly the same point in the process at which the Stop button was clicked.

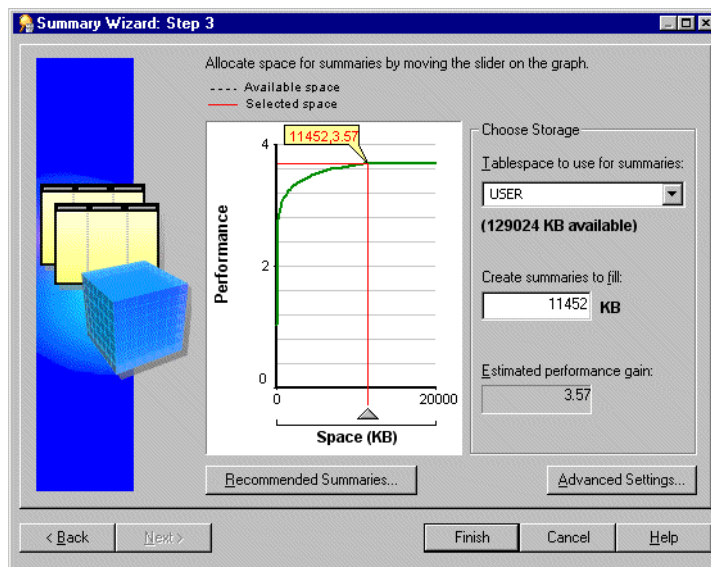
**Figure 14–3 Summary Wizard: Step 2**



**Note:** If some folders cannot be analyzed Discoverer displays the "Not Analyzed dialog".

6. When analysis is complete click Next to allocate space for summaries.

Figure 14–4 Summary Wizard: Step 3



The graph plots the expected performance gain from allocating a certain amount of space for summary folders.

The information displayed here is calculated during folder analysis (see previous step). If you make changes using any of the tabs in the Change Default Settings dialog Discoverer might recalculate the graph.

For more information about settings see ["Summary Wizard \(ASM\): Change default settings: List of dialog tabs"](#).

7. Select the tablespace in which to store summary data in the **Tablespace to use for summaries** list box.

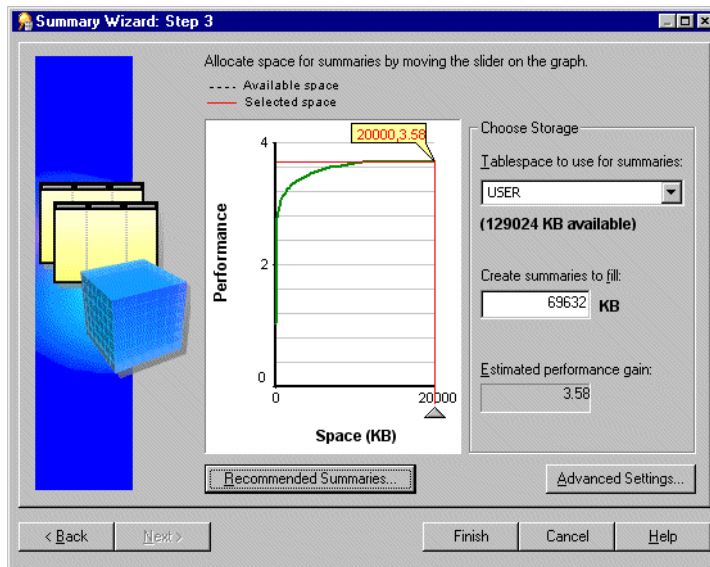
**Note:** We recommend you place summary data in a separate tablespace specifically intended for it. If such a tablespace does not exist, we strongly recommend you do not use the SYSTEM or TEMP tablespaces. For more information, ask your database administrator.

8. Specify the amount of space to allocate for summary data in one of the following ways:

- click the graph area and drag the pointer/red line to select the space you want to allocate for summaries
- specify a figure in the **Create summaries to fill** field

**Note:** The value beneath the **Tablespace to use for summaries** field can be less than the value specified in the **Create summaries to fill** field. This does not matter if you have set your tablespace to autoextend. With your tablespace set to autoextend the extra space needed will be added automatically to the database. If your tablespace is not set to autoextend the value **Space (KB)** must be less than the available space.

**Figure 14–5 Summary Wizard: Step 3**



9. (optional) To view the summary folders that ASM will create/remove for you, click the Recommended Summaries button.

For more information about recommended summaries, see the "[Recommended Summaries dialog](#)".

10. (optional) To display the Change default settings dialog, click the Advanced Settings button.

For more information about advanced settings, see "[Summary Wizard \(ASM\): Change default settings: List of dialog tabs](#)".

11. Click Finish to generate summary folders based on the current settings.

These settings include those made at the Recommended Summaries dialog or the Change Default Settings dialog.

### Notes

To view all the summary folders in the current EUL, display the "[Workarea: Summaries tab](#)".

## How to run ASM after bulk load using the Load Wizard

When you use the Load Wizard to load a business area into the current EUL, you can choose whether to create a set of summary folders for this new business area. If you take this option then suitable summaries will be created after bulk load.

To run ASM after bulk load using the Load Wizard:

1. Choose Insert | Business Area | From Database to start the Load Wizard (for more information about using the Load Wizard, see [Chapter 4, "What is the Load Wizard?"](#)).
2. In step 4 of the Load Wizard click the option **Summaries based on folders that are created**.

For more information, see "[Load Wizard: Step 4 dialog](#)"

### Notes

- The summary folders created during bulk load of a business area are derived from analyzing the tables and using the default summary policy.

For more information about the ASM policy, see "[What is the ASM policy?](#)"

- When database tables have just been loaded in the bulk load process, query statistics will not be available. Where Discoverer has been in use for a while, query statistics will have been gathered by Discoverer. Where query statistics are available they will be used by ASM to create more suitable summary folders.
- You do not need to make any changes to summary policy settings for a bulk load ASM process. The default settings which are used should be adequate. If changes are made however, these settings then become the defaults.

## How to run ASM using the command line interface

To run ASM using the command line interface:

1. From the Start menu choose Run.
2. Type in the appropriate command.

For more information about the command line interface, see [Chapter 21, "What is the Discoverer command line interface?"](#). For more information about ASM commands and command modifiers see and [Chapter 21, "/asm"](#).

## How to run ASM using a batch file and the operating system scheduler

You can run ASM through the batch file/scheduler facility provided by your operating system. This way you specify when you want ASM to run including the scheduled intervals when you want to repeat the process.

By using the command line syntax within a batch file the process can be run automatically overnight or on a weekend. This enables the system to maintain itself.

Before you can run ASM from a batch file you need to do two things:

1. Create a text file in a text editor (e.g. Notepad).
2. Using the correct command line syntax, enter the command line details as text into the batch file.

For more information about ASM command line syntax, see [Chapter 21, "/asm"](#).

3. Save the file as a .bat file (e.g. asmsched.bat).
4. Use the correct operating system commands to schedule the batch file.

To learn how to schedule a batch file see your operating system documentation or help.

## How to configure the database for summary folders

The summary management feature in Discoverer uses native features in the Oracle database management system (DBMS), and is therefore only available when running against the Oracle database. This feature uses the same highly scalable and reliable processing procedures as the workbook scheduling capability and the setup for both features is similar. These procedures use standard packages in the DBMS called DBMS\_JOB.

To enable the processing procedures for summary management in Discoverer you can check the following tasks:

- ["How to confirm that DBMS\\_JOB is installed for summary management"](#)
- ["How to grant the privileges needed to create summary folders"](#)
- ["How to determine and reset tablespace quotas"](#)
- ["How to check object/schema name"](#)
- ["How to set the start time for summary processing"](#)

## How to confirm that DBMS\_JOB is installed for summary management

To confirm that DBMS\_JOB is installed for summary management:

1. Log onto SQL\*Plus as the database administrator and execute the following SQL statement:

```
SQL> select * from all_objects where object_name='DBMS_JOB' and object_type
= 'PACKAGE';
```

If the statement returns no rows, use your database administrator SVRMGRL (Oracle 8.0) to create the necessary packages.

To install DBMS\_JOB and create the necessary packages for summary management, for Oracle9i databases:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> CONNECT username/password@database AS SYSDBA;
```

3. Execute the following SQL statements:

```
SQL> start <ORACLE_HOME>/rdbms/admin/dbmsjob.sql;
SQL> start <ORACLE_HOME>/rdbms/admin/prvtjob.plb;
```

To install DBMS\_JOB and create the necessary packages for summary management, for Oracle databases earlier than Oracle9i:

1. From Windows choose Start | Run.
2. Type in one of the following:
  - SVRMGRL (for Oracle 8.0)
  - SVRMGR (for Oracle8i Personal Edition)

3. When in the DBA facility, type `connect internal`

4. Execute the following SQL statements:

```
SQL> start <ORACLE_HOME>/rdbms/admin/dbmsjob.sql;
SQL> start <ORACLE_HOME>/rdbms/admin/prvtjob.plb;
```

## How to grant the privileges needed to create summary folders

You can grant the privileges needed to create summary folders in the following ways:

- ["Task to grant the privileges needed to create summary folders"](#)
- ["Script to grant the privileges needed to create summary folders against an Oracle 8.1.7 database \(or later\)"](#)

### Notes

The <user> below is the userid of the person using Discoverer Administrator.

### Task to grant the privileges needed to create summary folders

To grant the privileges needed to create summary folders, for Oracle9i databases:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> CONNECT username/password@database AS SYSDBA;
```

3. Execute the following SQL statements:

```
SQL> grant CREATE TABLE to <user>;
SQL> grant CREATE VIEW to <user>;
SQL> grant CREATE PROCEDURE to <user>;
SQL> grant CREATE ANY MATERIALIZED VIEW to <user>;
SQL> grant DROP ANY MATERIALIZED VIEW to <user>;
SQL> grant ALTER ANY MATERIALIZED VIEW to <user>;
SQL> grant GLOBAL QUERY REWRITE to <user> with admin option;
SQL> grant ANALYZE ANY to <user>;
SQL> grant SELECT ON V_$PARAMETER to <user>;
```

**Note:** To grant SELECT ON V\_\$PARAMETER you must be logged in as the SYS user. If you are unsure about the SYS user name and password, see your database administrator.



To grant the privileges needed to create summary folders, for Oracle databases earlier than Oracle9i:

1. From Windows choose Start | Run (on the database server machine).
2. Type in one of the following:
  - SVRMGRL (for Oracle 8.0)
  - SVRMGR (for Oracle8i Personal Edition)
3. When in the DBA facility, type `connect internal`
4. Execute the following SQL statements:

```
SQL> grant CREATE TABLE to <user>;
SQL> grant CREATE VIEW to <user>;
SQL> grant CREATE PROCEDURE to <user>;
SQL> grant CREATE ANY MATERIALIZED VIEW to <user>;
SQL> grant DROP ANY MATERIALIZED VIEW to <user>;
SQL> grant ALTER ANY MATERIALIZED VIEW to <user>;
SQL> grant GLOBAL QUERY REWRITE to <user> with admin option;
SQL> grant ANALYZE ANY to <user>;
SQL> grant SELECT ON V_$PARAMETER to <user>;
```

**Note:** To grant SELECT ON V\_\$PARAMETER you must be logged in as the SYS user. If you are unsure about the SYS user name and password, see your database administrator.

### Script to grant the privileges needed to create summary folders against an Oracle 8.1.7 database (or later)

A script granting privileges required to create summary folders against an Oracle 8.1.7 database (or later) can be found in:

```
<ORACLE_HOME>\DISCV902\SQL\eulasm.sql.
```

## How to determine and reset tablespace quotas

A database user must have enough quota in their default tablespace to create summary tables. The following tasks enable you to determine and tablespace quotas, if necessary.

To determine tablespace quotas, for Oracle9i databases:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> CONNECT username/password@database AS SYSDBA;
```

3. Execute the following SQL statement:

```
SQL> select * from dba_ts_quotas where username = <user>;
```

where <user> is the userid of the person using Discoverer Administrator.

To determine tablespace quotas, for Oracle databases earlier than Oracle9i:

1. From Windows choose Start | Run.
2. Type in one of the following:
  - SVRMGRL (for Oracle 8.0)
  - SVRMGR (for Oracle8i Personal Edition)
3. When in the DBA facility, type `connect internal`
4. Execute the following SQL statement:

```
SQL> select * from dba_ts_quotas where username = <user>;
```

where <user> is the userid of the person using Discoverer Administrator.

To reset tablespace quotas:

1. Reset the tablespace quotas by executing the following SQL statement:

```
SQL> alter user <user> quota <n> on <tablespace>;
```

where <user> is the userid of the person using Discoverer Administrator

where <n> is the quota in K(ilobytes) or M(egabytes) or Unlimited

where <tablespace> is the default tablespace name e.g. USERS

## How to check object/schema name

A user must not have an object in their schema with the same name as their user name. This task shows you how to look for any objects in your schema that have the same name as your database user name.

To check whether there are any objects in your schema with the same name as your user name, do the following:

1. Login to SQL\*Plus as the user.
2. Execute the following SQL statement:

```
SQL> select object_name from user_objects where object_name =  
<user>;
```

where <user> is the same as the login used for SQL\*Plus.

## How to set the start time for summary processing

The summary management processes run within the database on the server, and are controlled by parameters in the initialization file of the Oracle DBMS - the INIT<SID>.ORA file.

### Limiting the number of processing requests that can run simultaneously

The parameter `job_queue_processes` specifies the number of concurrent processes to use to process `DBMS_JOB`. That is, it controls the number of processing requests that can be handled simultaneously. The default value is zero which means processing requests will NOT be created. You should set it to a minimum of 2, or more if you have any other applications that use `DBMS_JOB`.

You need more than one job queue process, because if one job fails for any reason, it may keep getting re-submitted and thus prevent everything else in the queue from being completed. If you wish to have 10 simultaneous processing requests handled then you will need to set this to 10.

The INIT<SID>.ORA parameter `job_queue_interval` is the time in seconds which controls how often the job processes process pending jobs. We recommend that you update the 60 second default to at least 10 minutes (a value of 600). Note that this parameter also affects workbook scheduling.

To enable the above parameters:

1. Locate the INIT<SID>.ORA file.

The INIT<SID>.ORA file is held in <ORACLE\_HOME>\database. The default name of the file is INITORCL.ORA, where ORCL is the <SID> name.

2. Enter 2 lines into the file. For example:

```
job_queue_processes = 2  
job_queue_interval = 600 (Note: this is equivalent to 10 minutes)
```

### **Notes**

The summary management and workbook scheduling features both use this scheduling capability within the Oracle DBMS. The interval you specify and the number of concurrent requests affect both features.

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## Creating summary folders manually

### Creating summary folders manually

This chapter explains how you create summary folders manually using Discoverer Administrator (i.e. instead of using Automated Summary Management), and contains the following topics:

- "What is manual summary folder creation?"
- "What are the prerequisites for creating summary folders manually in Discoverer?"
- "What are summary combinations?"
- "What to consider when defining summary combinations?"
- "Guidelines for setting up summary combinations"
- "When will an expression use a summary folder?"
- "How to create summary folders based on items in the EUL"
- "How to create summary folders based on users' queries"
- "How to create summary folders based on external summary tables"
- "How to manually refresh a summary folder"
- "How to edit the properties of summary folders"
- "How to edit summary folders"
- "How to edit database storage properties of summary combinations for a summary folder"
- "How to delete summary folders"

- ["How to view the status of the summary tables/materialized views for a summary folder"](#)

## What is manual summary folder creation?

Manual summary folder creation is the process of creating summary folders yourself, instead of using Discoverer's Automated Summary Management (ASM) functionality (for more information, see [Chapter 14, "Managing summary folders"](#)). You might choose to create summary folders yourself if you want to:

- manually select the combination of EUL items (e.g. when you know the items to use in the summary folder)
- use query performance statistics to choose from a selection of summary folder suggestions (based on queries that have been run)
- use a summary table or view created and/or maintained by an external application (e.g. an external summary table)

You choose whether to create summary folders using ASM or manually in the first step of the Summary Wizard. To create summary folders manually you select the option **I want to specify the summaries myself** and complete one of the following tasks:

- ["How to create summary folders based on items in the EUL"](#)
- ["How to create summary folders based on users' queries"](#)
- ["How to create summary folders based on external summary tables"](#)

For information about summary folders and how Discoverer creates and maintains them automatically see [Chapter 14, "Managing summary folders"](#).

## What are the prerequisites for creating summary folders manually in Discoverer?

To create summary folders, the following requirements must be met:

- The database must support PL/SQL.
- The DBMS\_JOB package must be installed for scheduling summary folder creation and refresh. For more information see [Chapter 14, "How to confirm that DBMS\\_JOB is installed for summary management"](#).
- The User ID that you intend to use to create the summary folders must have the following database privileges:

- CREATE TABLE
- CREATE VIEW
- CREATE PROCEDURE
- SELECT ON V\_\$PARAMETER
- CREATE/DROP/ALTER ANY MATERIALIZED VIEW (Oracle 8.1.7 databases or later)
- GLOBAL QUERY REWRITE (Oracle 8.1.7 databases or later)

For more information, see [Chapter 14, "How to grant the privileges needed to create summary folders"](#).

- The User ID that you intend to use to create the summary folders must have sufficient quota in their default tablespace. For more information, see [Chapter 14, "How to determine and reset tablespace quotas"](#).

### Notes

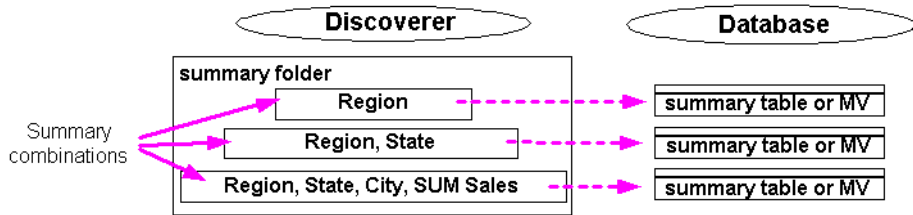
- If a database user was created in Discoverer 3.1 against an Oracle 8.1.7 database (or later) it must have additional privileges granted to enable them to create summary folders (for more information, see [Chapter 14-1, Table 14-1, "Whether a database user created in Discoverer requires additional privileges to create summary folders?"](#)).
- If you want Discoverer to use external summary tables, the EUL owner:
  - must have SELECT access to the external summary tables
  - must have been granted SELECT access explicitly (i.e. not via a database role)

## What are summary combinations?

Summary combinations are groupings of items that make up a summary folder. A summary combination maps directly to a summary table or materialized view in the database. Discoverer creates summary tables or materialized views based on the summary combinations you create. Each summary combination defines a different way of combining two or more items in a summary folder. If a Discoverer Plus user executes a query with a combination of items that closely matches those specified in a particular combination, the query will be run against a summary table or materialized view instead of the detail data.

You can define as many combinations as you need for each summary folder using the Summary Wizard.

**Figure 15–1** The relationship between summary combinations, summary folders and summary tables/materialized views



If you create multiple summary combinations, Discoverer (where possible) builds the higher level combinations (i.e. combinations with a greater number of items) using the lower level combinations (i.e. combinations with fewer items). This improves performance because:

- the detail tables do not have to be queried so often
- summary folders are refreshed more quickly

For example, if we have two summary combinations in a summary folder where the first combination is month, region and revenue and the second combination is year, region and revenue. Discoverer aggregates the data for the revenue by month and region by accessing the detail data directly. Discoverer then uses data aggregated for the first combination to aggregate the data for the second combination, saving both processing and cpu overhead.

**Note:** Summary combinations are only available when Discoverer manages the refresh of a summary folder. When Discoverer uses external summary tables, summary combinations are not available.

## What to consider when defining summary combinations?

There are three things to consider when defining summary combinations:

- how much database space is required to store summary data?
- how quickly do you want a query to run?
- how often is a query run?



The key to good summary folder design is to create the most appropriate summary combinations for the pattern of system usage.

Typically you will want queries that are run most often to run the most quickly, even if this requires more database space. Similarly, it is usually desirable for queries that run less frequently to use less database space, even if this means the queries run more slowly.

When creating summary combinations, look for:

- summary combinations for popular and frequent queries

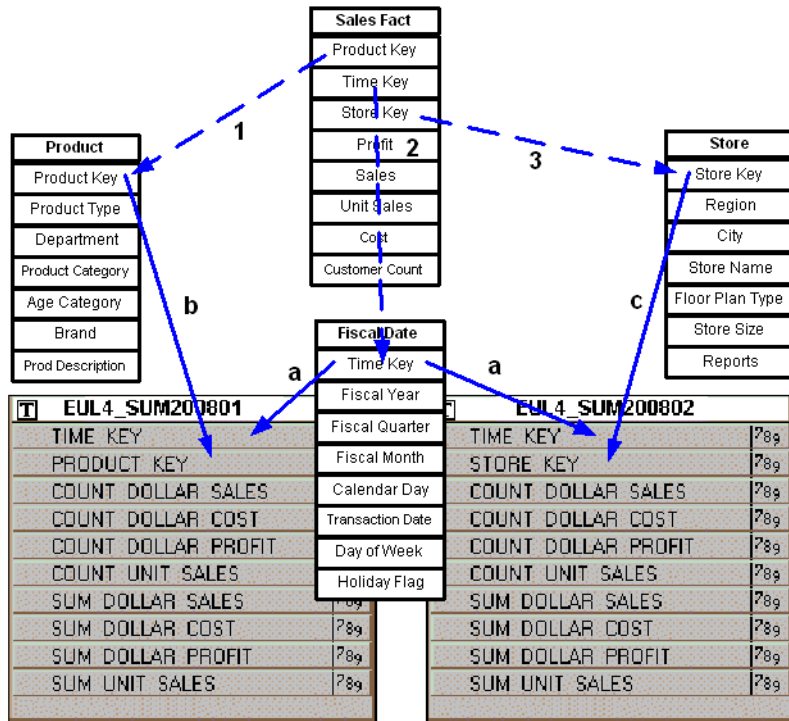
If you are creating a summary combination for a popular query, include all the items and joins used in the query. Note that such a summary combination might require considerable database space, but the query will run much more quickly.

- summary combinations that meet ad hoc, less frequent queries

Summary combinations for the more ad hoc environment (where queries are far less predictable) are typically based on different combinations of keys in the main fact table.

For example, the columns of the two summary tables EUL4\_SUM200801 and EUL4\_SUM200802 below are mapped to appropriate items in the Sales Fact folder.

**Figure 15–2 Sample summary tables and joins to fact and dimension tables**



Key to the figure above:

The tables EUL4\_SUM200801 and EUL4\_SUM200802 represent the summary tables that Discoverer creates in the database.

The numbers 1, 2 and 3 represent existing joins between the Sales Fact table and the dimension tables.

The letters a, b and c represent joins to the following dimension tables:

- a. FISCAL DATE
- b. PRODUCT
- c. STORE

Discoverer will join one of these summary tables to one or more of the dimension tables (STORE, PRODUCT, or FISCAL DATE) to obtain a quick answer. The requirement is that the target dimension table must be joined to the fact table by items

defined in the EUL, and that the summary table contains the foreign key items in the fact folder.

If the user requests Product Category, Month and SUM(Dollar Profit), Discoverer will join EUL4\_SUM200801 to PRODUCT and FISCAL DATE to obtain results. Discoverer knows about the foreign and primary keys between SALES\_FACT and the two tables, and can apply them to EUL4\_SUM200801.

## Guidelines for setting up summary combinations

We suggest that you build summary combinations in stages. Concentrate first on frequent queries, then on less frequent queries, and finally create a 'catch-all' summary combination.

**Table 15–1 Guidelines for setting up summary combinations**

	Number of items	Notes
<b>Frequent queries</b>	3-4	Create many summary combinations that combine only three or four axis items (dimension values). This minimizes space and maximizes performance gain.
<b>Less frequent queries</b>	5-7	Create less summary combinations that combine, for example five to seven axis items. More space is required but large performance gains are still realized. The more items you create in a summary combination the wider the variety of queries that is served.
<b>A catch all</b>	all	When you choose to specify summaries yourself, create one summary combination that contains all of the items in a summary folder (the total number must be less than the number of items in the source folder(s)). Although the speed of the query results are slower, performance is still considerably better than if the detailed tables are queried. Discoverer Administrator creates this summary combination automatically

- Include all data point items in all of the summary combinations. Additional data point items take up little extra room in the summary tables.
- Include aggregates (with the possible exception of STDEV and VARIANCE, which are rarely used). Multiple aggregates do not require much space and can improve performance significantly. Keep in mind that AVG requires the inclusion of SUM and COUNT, which Discoverer uses to calculate the average.

## Notes

You do not have to include items at all levels of a hierarchy in a summary combination. If you include items at the bottom level, queries that use items higher up in the hierarchy can still use the summary table. However, for this to work the summary folder must contain a foreign key to the folder that contains the hierarchy. Creating a summary combination for all levels in a hierarchy achieves only a marginal performance gain. For example, the hierarchy from Year to Quarter only saves a 4:1 aggregation because quarters are added up to years.

## When will an expression use a summary folder?

An expression will use a summary folder except under specific conditions. For this reason it is useful to be able to identify when an expression will use a summary folder. The following examples show when an expression will use a summary folder, if that summary folder contains the item SUM(Salary) and SUM(Comm):

**Table 15–2** *Examples of when an expression will use a summary folder*

Expression	Use summary table	Notes
SUM(Salary + Comm)	No	This expression will not use a summary folder even though SUM(Salary) and SUM(Comm) are available as summarized items. This occurs because SUM(Salary + Comm) is not relationally equal to SUM(Salary) + SUM(Comm). Because the results could be wrong, the expression will not be used.
SUM(Salary) * 12	Yes	You can query expressions such as this, and as SUM(Salary) is summarized it will use the summary folder.
NVL(SUM(Comm),0)	Yes	Expressions that use SQL functions such as NVL(SUM(Comm),0) will use a summary because SUM(Comm) is available in a summary.
SUM(NVL(Comm,0))	No	An expression such as SUM(NVL(Comm,0)) will not use a summary, because no direct match exists between a part of the expression and the available summarized item, SUM(Comm).

In essence, an expression will only use a summary folder when the expression or parts of it and the summarized expression are relationally equal.

## How to create summary folders based on items in the EUL

Use this option to manually select combinations of EUL items that you want to include in a summary folder.

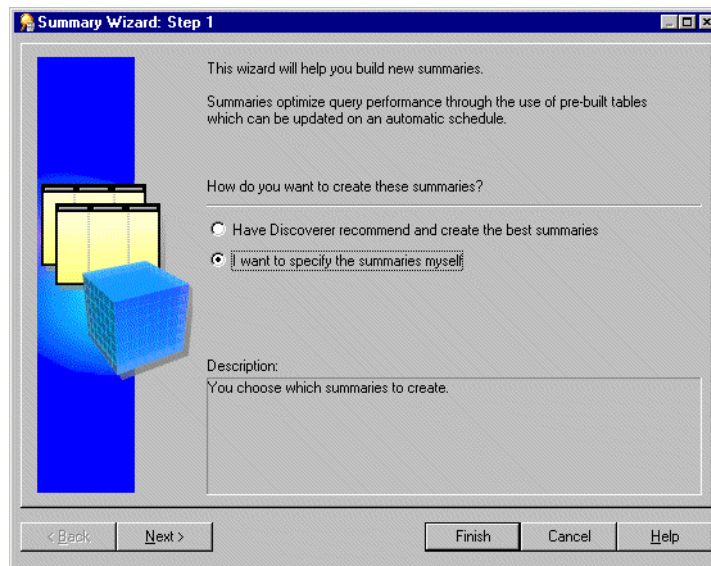
You might select this option if, for example:

- you have switched off the **Collect Query Statistics** privilege (for more information, see [Chapter 7, "How to specify the tasks a user or role \(responsibility\) can perform"](#))
- you want to manually select the combinations of EUL items that make up a summary folder

To create summary folders based on items in the EUL.

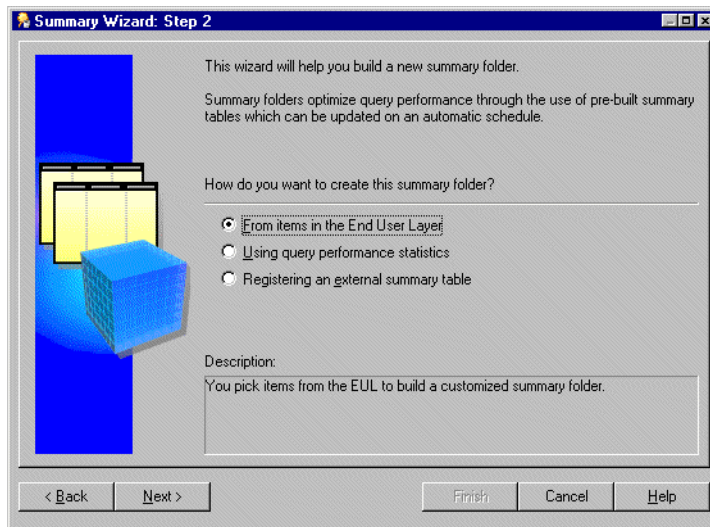
1. Select **Insert | Summary** to display "[Summary Wizard: Step 1 dialog](#)".

*Figure 15–3 Summary Wizard: Step 1 dialog*



2. Select the **I want to specify the summaries myself** radio button and click **Next** to display "[Summary Wizard: Step 2 dialog](#)".

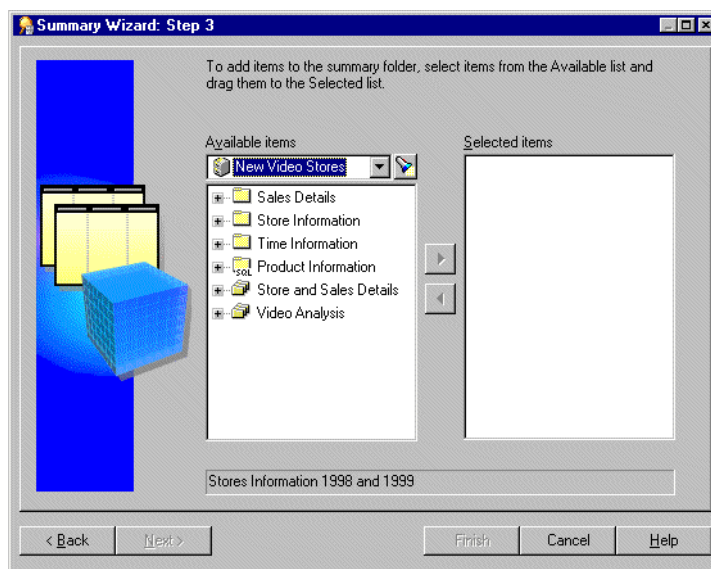
**Figure 15–4 Summary Wizard: Step 2 dialog**



3. Select **From items in the End User Layer** to create a summary folder.

This option is only available if the summary folders feature is enabled. For more information, see [Chapter 14, "How to configure the database for summary folders"](#).

4. Click Next to display the "[Summary Wizard: Step 3](#)".

**Figure 15–5 Summary Wizard: Step 3 dialog**

5. Move the items that you want to include in the new summary folder from the **Available items** list to the **Selected items** list.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

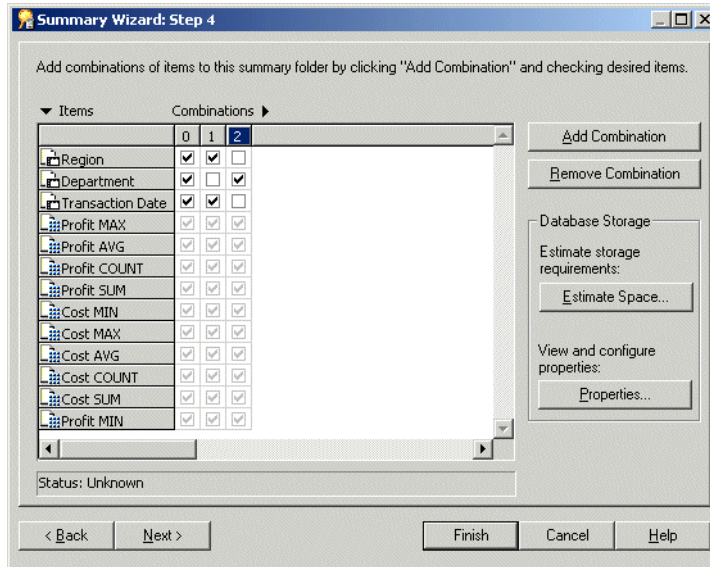
Remember to include:

- all aggregate functions for each data point item - for more information, see ["Guidelines for setting up summary combinations"](#).
- items from complex folders (where necessary) - for more information, see [Chapter 16, "What are the conditions for query rewrite by Discoverer?"](#).
- derived items (where necessary) - for more information, see [Chapter 16, "What are the conditions for query rewrite by Discoverer?"](#).

**Note:** You can select any items and math functions. However, if you select items from different folders, a join must already exist between the folders.

6. Click Next to display the "Summary Wizard: Step 4" to define the summary combinations in the new summary folder.

**Figure 15–6 Summary Wizard: Step 4 dialog**



The Summary Wizard: Step 4 dialog enables you to define the summary combinations in the new summary folder.

By default, all the items you selected in the Summary Wizard: Step 3 are included in the first summary combination (in column 0).

7. Click Add Combination to add a new summary combination.  
The summary combination appears in a new numbered column.
8. Select the relevant check boxes to include items in the summary combination.
9. Add as many summary combinations as necessary

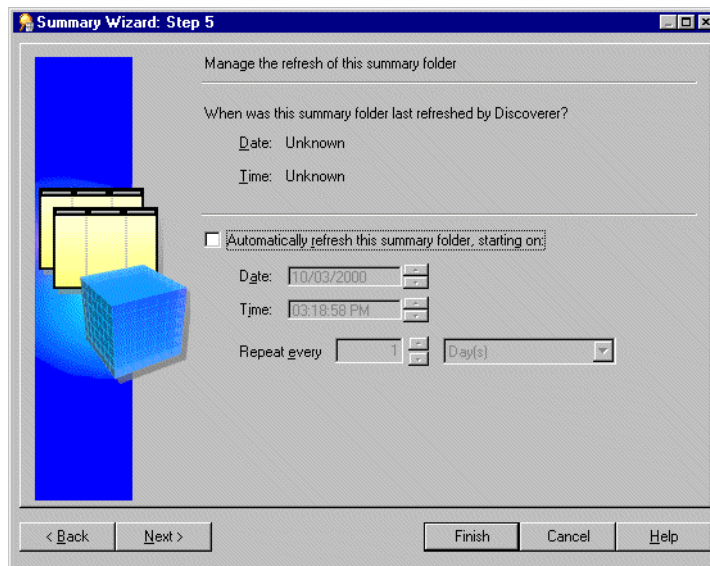
For more information, see "[What are summary combinations?](#)"

**Hints:**



- If you are not sure whether the performance gains offered by using the specified summary combinations are outweighed by the amount of tablespace they occupy, click Estimate Space.
  - You can view and edit database storage properties for a selected summary combination by clicking Properties. For more information, see ["How to edit database storage properties of summary combinations for a summary folder"](#).
  - To remove an unwanted summary combination, select the relevant column number and click Remove Combination.
10. Click Next to display the ["Summary Wizard: Step 5"](#) to specify a refresh schedule for the summary folder.

**Figure 15–7 Summary Wizard: Step 5 dialog**



11. Select the **Automatically refresh this summary folder** check box to specify the date, time and frequency that Discoverer will automatically refresh this summary folder.

**Hint:** Do not select this check box if the data is static and will not change, or if you want to refresh the summary folder manually. For more information about

manually refreshing summary folders, see "[How to manually refresh a summary folder](#)".

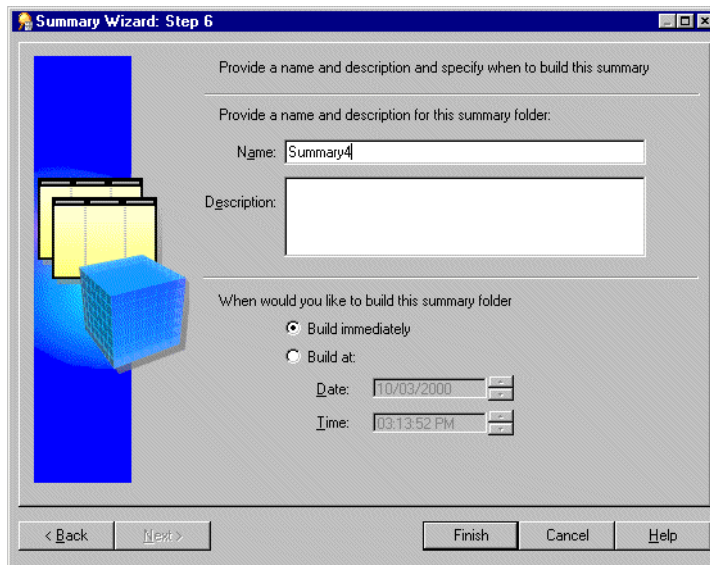
12. Set the date and time you want Discoverer to start the first refresh.

13. Set the **Repeat every** fields for the refresh interval you want.

The refresh period you specify here is the period of time that will elapse before Discoverer refreshes and updates the data. This refresh pattern will continue until you change the settings.

14. Click Next to display "[Summary Wizard: Step 6](#)".

**Figure 15–8 Summary Wizard: Step 6 dialog**



15. Specify a name and description for the summary folder.

16. Specify when you want to build this summary folder as follows:

- select the **Build immediately** radio button if you have smaller summary tables, or if you want to build the summary tables immediately.

- Select the **Build at** radio button if you have larger summary tables that are best built at off-peak hours. Enter the time and date you want to build the summary tables.

17. Click Finish.

When Discoverer builds the summary folder, it creates:

- a summary folder and summary tables (Oracle 8.1.5 databases or earlier)
- a summary folder and materialized views (Oracle 8.16 databases or later)

The build process generates the summary data and marks the summary table/materialized view as Ready to use.

When the process completes Discoverer displays the new summary folder in the "[Workarea: Summaries tab](#)".

## How to create summary folders based on users' queries

Query performance statistics are automatically generated when the **Collect Query Statistics** privilege is switched on for users (for more information, see [Chapter 7, "How to specify the tasks a user or role \(responsibility\) can perform"](#)).

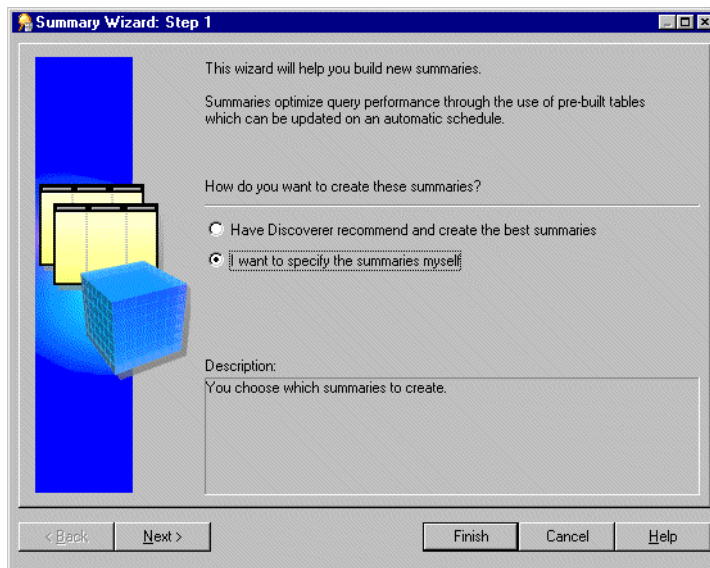
You can create a new summary folder based on query performance statistics rather than choosing the items yourself. Discoverer suggests the summary folder items for you based on the query performance statistics that are generated from Discoverer end user queries.

You might select this option if you know that you want to create one or more summary folders based upon specific queries and you do not necessarily want Discoverer to create any other summary folders.

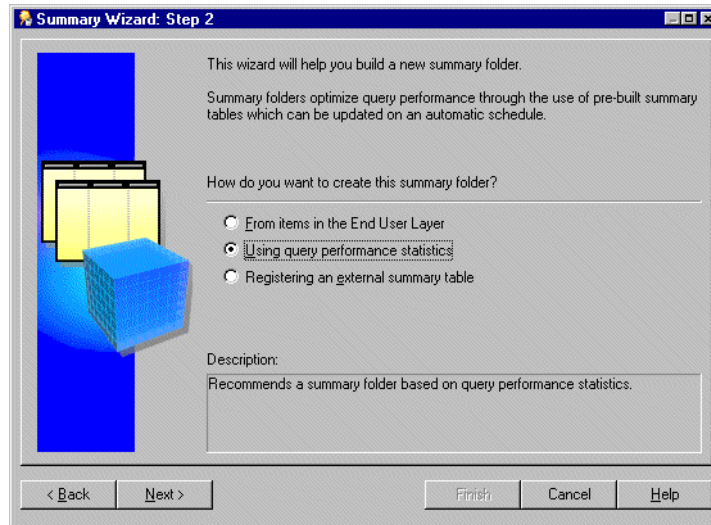
To create summary folders based on query performance statistics:

1. Choose Insert | Summary to display "[Summary Wizard: Step 1 dialog](#)".

**Figure 15–9 Summary Wizard: Step 1 dialog**



2. Select the **I want to specify the summaries myself** radio button and click Next to display "Summary Wizard: Step 2 dialog".

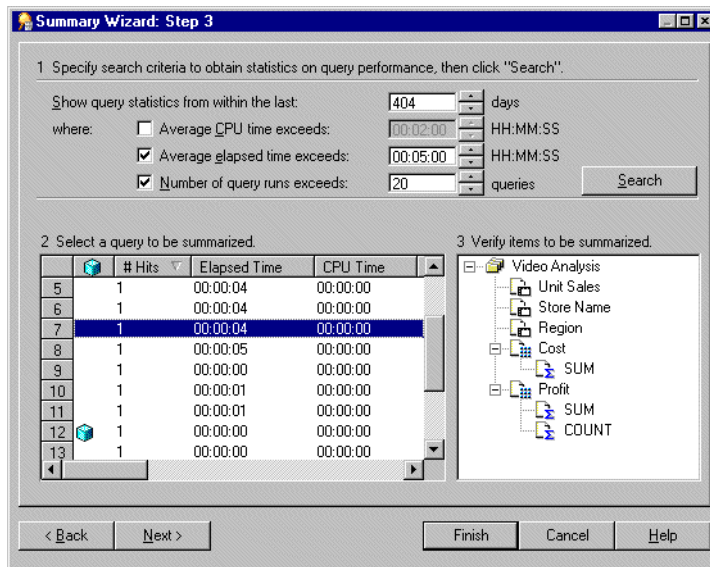
**Figure 15–10 Summary Wizard: Step 2 dialog**

3. Select the **Using query performance statistics** option.

This option creates a summary table or materialized view. It is only available if the summary management feature is enabled. For more information see [Chapter 14, "How to configure the database for summary folders"](#).

4. Click Next to display the "Summary Wizard: Step 3".

**Figure 15–11 Summary Wizard: Step 3 dialog**



The Summary Wizard: Step 3 dialog is divided into three sections:

---

**Section 1 - Specify search criteria to obtain statistics on query performance.**

This section enables you to specify search criteria to obtain statistics on query performance.

---

**Section 2 - Select a query to be summarized.**

This section shows queries that meet the search criteria.

---

**Section 3 - Verify items to be summarized**

This section shows a selected query's folders, joins and items.

---

5. Specify the values in Section 1 that you want to use to search for previously run queries.
6. Click Search.

If the search time is significant, Discoverer displays a progress bar.

All the queries that match the threshold values in Section 1 are displayed in Section 2. To narrow or expand this list further, re-specify the threshold values.

If a query in the list uses items that are already summarized, a cube icon appears beside the query.

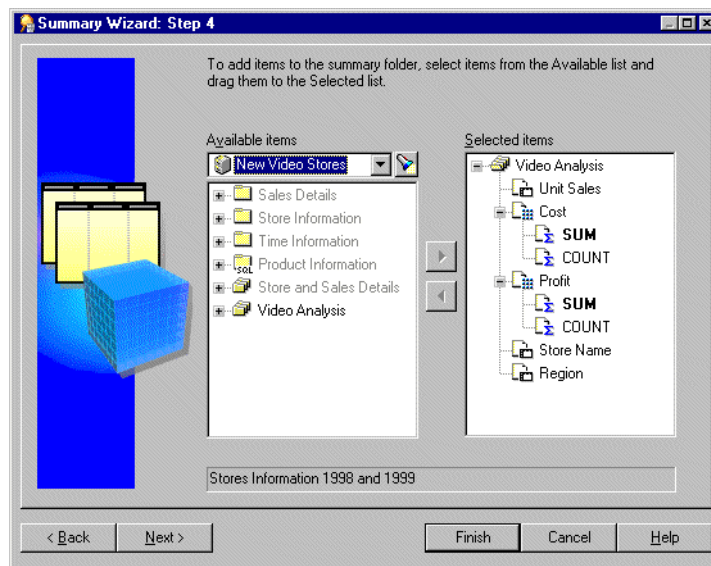
To sort the display order of items in a column in Section 2, click the relevant column heading.

7. Select the row that represents the query you want to summarize from the list in Section 2.

The query's folders, joins, and items appear in Section 3.

8. Click Next to display the "Summary Wizard: Step 4".

**Figure 15–12 Summary Wizard: Step 4 dialog**



The Summary Wizard: Step 4 dialog enables you to select items to include in the summary folder. By default, the **Selected items** list contains the items from the query you selected on the previous page of the Summary Wizard.

9. Move the items that you want to include in the new summary folder from the **Available items** list to the **Selected items** list.

You can select more than one item at a time by holding down the Ctrl key and clicking another item.

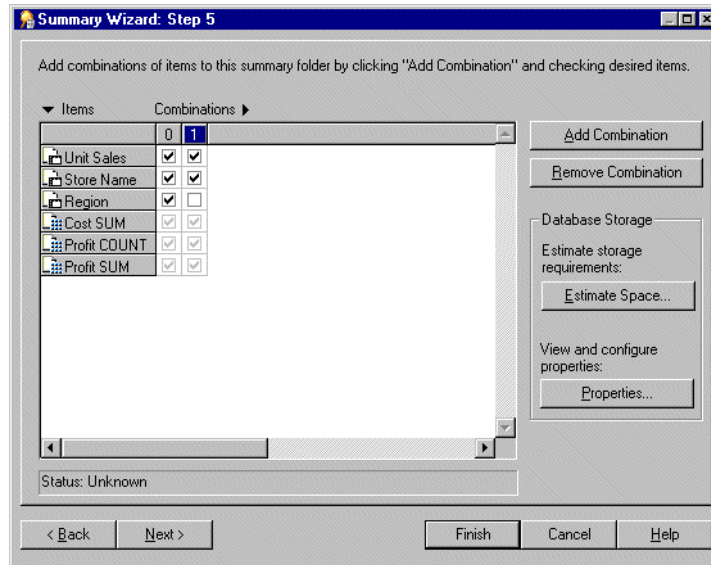
Remember to include:

- all aggregate functions for each data point item (for more information, see ["Guidelines for setting up summary combinations"](#))
- items from complex folders, where necessary (for more information, see [Chapter 16, "What are the conditions for query rewrite by Discoverer?"](#))
- derived items, where necessary (for more information, see [Chapter 16, "What are the conditions for query rewrite by Discoverer?"](#))

**Note:** You can select any items and math functions. However, if you select items from different folders, a join must already exist between the folders.

10. Click Next to display the ["Summary Wizard: Step 5"](#).



**Figure 15–13 Summary Wizard: Step 5 dialog**

The Summary Wizard: Step 5 dialog enables you to define the summary combinations in the new summary folder.

By default, all the items you selected in Summary Wizard: Step 4 are included in the first summary combination (in column 0).

11. Click Add Combination to add a new summary combination.

The summary combination appears in the new numbered column.

12. Select the relevant check boxes to include items in the new summary combination.
13. Add as many summary combination as necessary.

For more information, see ["What are summary combinations?"](#).

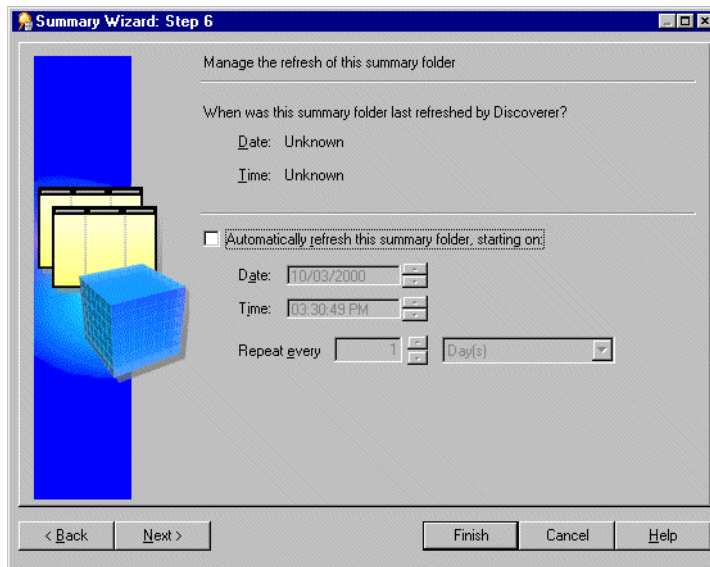
14. Click Estimate Space to help you decide whether the performance gains offered by using the specified summary combinations are outweighed by the amount of tablespace they occupy.
15. Click OK.

**Note:** You can view and edit database storage properties for a selected Summary Combination by clicking Properties. For more information, see ["How to edit database storage properties of summary combinations for a summary folder"](#).

**Hint:** To remove an unwanted summary combination, select the relevant column number and click Remove Combination.

16. Click Next to display the ["Summary Wizard: Step 6"](#) to specify a refresh schedule for the summary folder.

**Figure 15–14 Summary Wizard: Step 6 dialog**



17. Select the **Automatically refresh this summary folder** check box to specify the date, time and frequency of automatic refresh for this summary.

**Hint:** Do not select the check box if the data is static and will not change, or if you want to refresh the summary folder manually. For more information about manually refreshing summary folders, see ["How to manually refresh a summary folder"](#).

18. Set the **Date** and **Time** you want Discoverer to start the first refresh.

19. Set the **Repeat every** fields for the refresh interval you want.

The refresh period you specify here is the period of time that will elapse before Discoverer refreshes and updates the data. This refresh pattern will continue until you change the specification.

20. Click Next to display the "Summary Wizard: Step 7".

**Figure 15–15 Summary Wizard: Step 7 dialog**

21. Specify a name and description for the summary folder.
22. Specify when you want to build this summary folder.
23. Click Finish.

When Discoverer builds the summary folder, it creates:

a summary folder and summary tables (Oracle 8.1.5 databases or earlier)

a summary folder and materialized views (Oracle 8.1.6 databases or later)

The build process generates the summary data and marks the summary table/materialized view as 'Ready to use'.

When the process is complete Discoverer displays the new summary folder in the "[Workarea: Summaries tab](#)".

### **Notes**

The business area named Query Statistics that is supplied with Discoverer includes a workbook that analyzes the following:

- query usage
- the items most frequently used in queries
- the folders containing the items
- query execution times

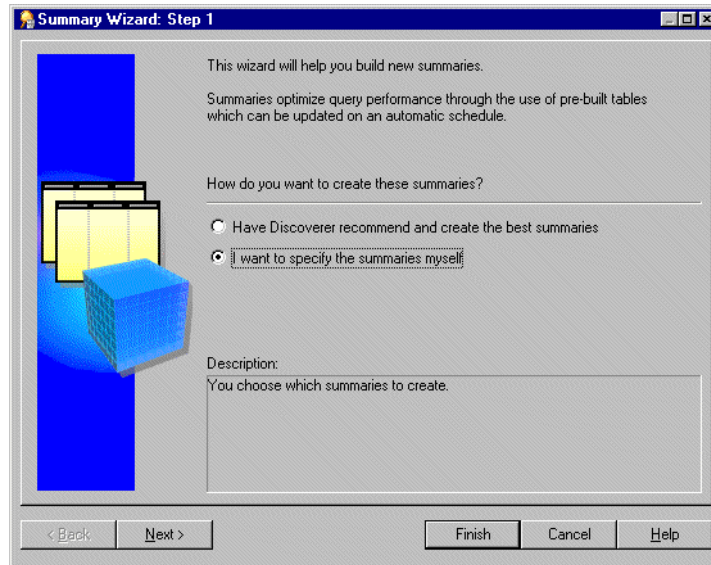
## **How to create summary folders based on external summary tables**

This section describes how to create a new summary folder based on summary tables created by an application other than Discoverer. Summary tables created by an application outside Discoverer are called external summary tables. Note that this task also applies to creating summary folders based on external views.

To create summary folders based on external summary tables:

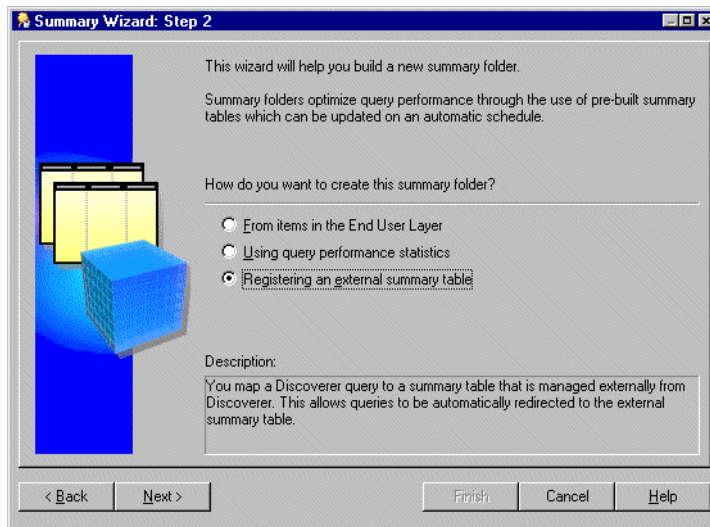
1. Choose Insert | Summary to display "[Summary Wizard: Step 1 dialog](#)".

**Figure 15–16 Summary Wizard: Step 1 dialog**



2. Select the radio button **I want to specify the summaries myself** and click Next to display "**Summary Wizard: Step 2 dialog**".

**Figure 15–17 Summary Wizard: Step 2 dialog**



**3. Select the **Registering an external summary table** radio button.**

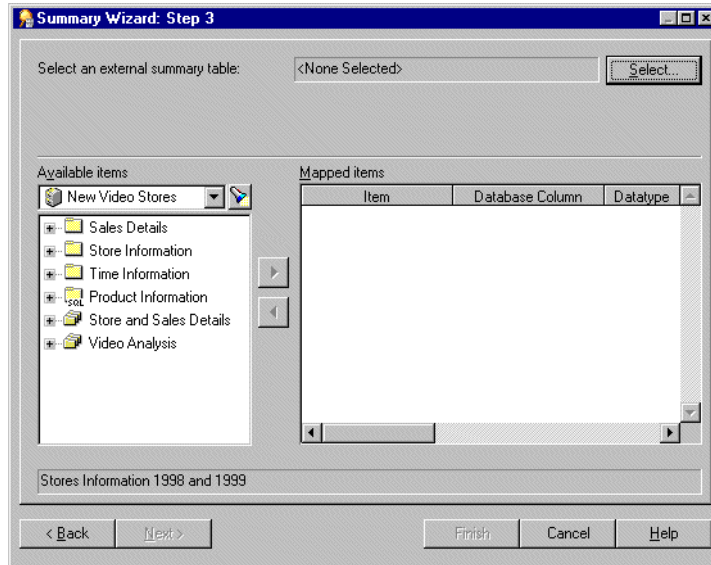
The result of completing this task is that the database will create a materialized view from the summary table created by the external application.

Note that Discoverer will continue to create summary tables under the following conditions:

- If you run Discoverer against an Oracle 8.1.5 database (or earlier).  
For more information, see [Chapter 16, "What is different about summary folders that are based on external summary tables?"](#).
- If you map an external view to EUL items against an Oracle 8.1.7 database (or later).  
For more information, see [Chapter 16, "What is different between mapping external summary tables and views to EUL items, with Oracle 8.1.7 databases \(or later\)"](#).

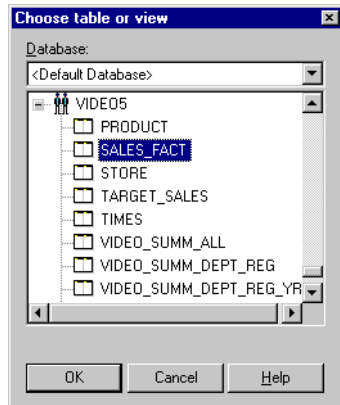
**4. Click Next to display the "Summary Wizard: Step 3 dialog".**

**Figure 15–18 Summary Wizard: Step 3 dialog**



5. Click Select to display the "Choose user or table/view dialog".

**Figure 15–19 Choose table or view dialog**

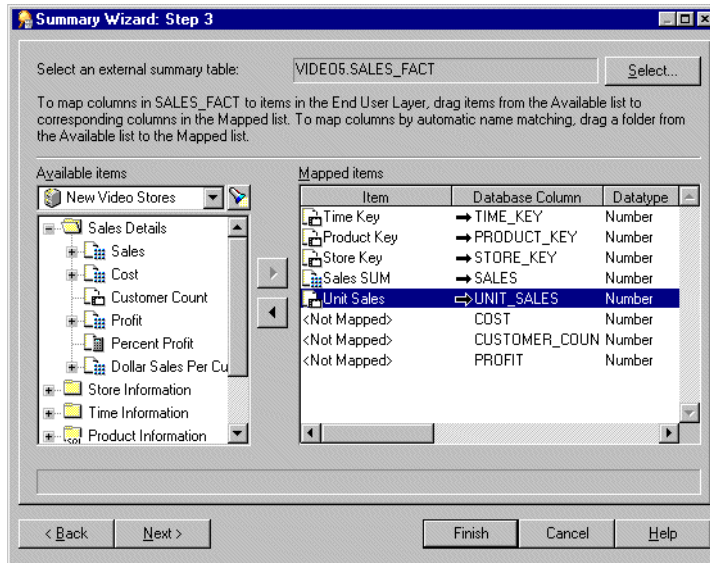


6. Select the database (from the drop down list) that contains the external summary table that you want to register.

**Note:** When connected to an Oracle 8.1.7 database (or later), Oracle prevents a user from registering an external summary over a database link. This is because the database does not allow a materialized view to be created over a database link. However, this may be achieved by creating a view in the database that the EUL is in and referencing the external summary in the view. This view may then be registered within Discoverer as an external summary.

7. Select the external summary table that you want to register with Discoverer Administrator.
8. Click OK to display all the database columns found in the external summary table in the mapped items list.

**Figure 15–20 Summary Wizard: Step 3 dialog**



You now map each database column in the external summary table to a corresponding item in the EUL.

9. For each database column, drag the corresponding item from the **Available items** list onto the database column in the **Mapped items** list

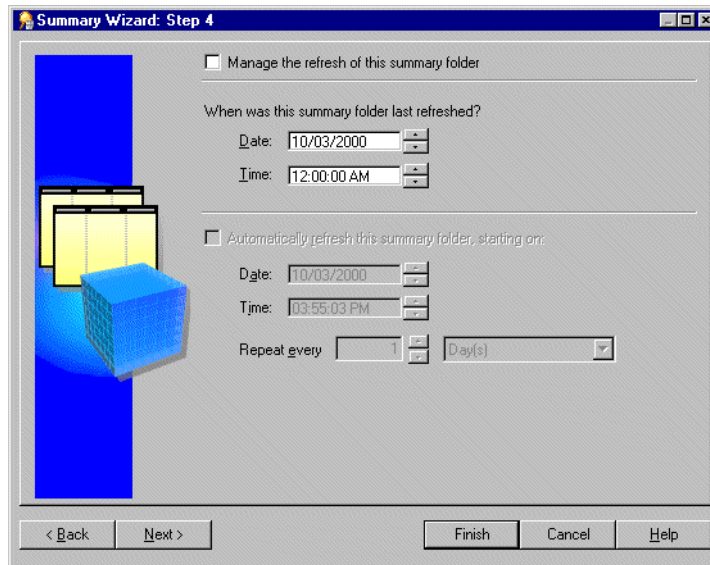


**Hint:** If several items from the same folder correspond to columns in the external summary table, you can drag and drop the folder onto an item in the **Mapped items** list. Discoverer Administrator attempts to map the correct items to the database columns using the item names. Note that you will have to map items to any columns for which Discoverer Administrator cannot identify corresponding items.

**Hint:** To remove the mapping between a database column in the external summary table and an item in the EUL, select the relevant row in the **Mapped items** list and click the left arrow button.

10. Click Next to display the "Summary Wizard: Step 4" to specify a refresh schedule for the summary folder.

**Figure 15–21 Summary Wizard: Step 4 dialog**



11. Select the **Manage the refresh of this summary** check box if you want Discoverer to manage the refresh of this external summary table.
12. Select the **Automatically refresh this summary folder** check box to specify the date, time and frequency of automatic refresh for this summary.

**Hint:** Do not select the check box if the data is static and will not change, or if you want to refresh the summary folder manually. For more information about

manually refreshing summary folders, see "[How to manually refresh a summary folder](#)".

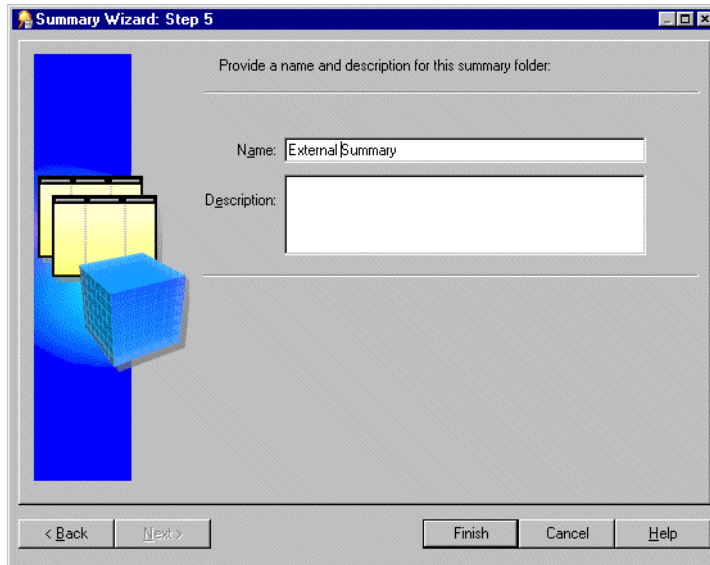
13. Set the Date and Time you want Discoverer to start the first refresh.

14. Set the **Repeat every** fields for the refresh interval you want.

The refresh period you specify here is the period of time that will elapse before Discoverer refreshes and updates the data. This refresh pattern will continue until you change the specification.

15. Click Next to display "[Summary Wizard: Step 5](#)".

**Figure 15–22 Summary Wizard: Step 5 dialog**



16. Specify a name and description for the summary folder

17. Click Finish to create the summary folder in the business area and register the external summary table with Discoverer.

When the process is complete, Discoverer displays the new summary folder in the "[Workarea: Summaries tab](#)".

## Notes

Summary combinations are only available when Discoverer manages the refresh of a summary folder. When Discoverer uses external summary tables, summary combinations are not available.

## How to manually refresh a summary folder

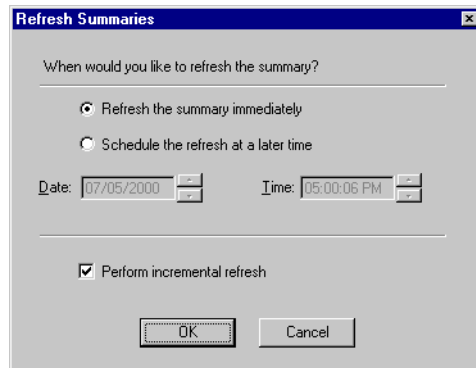
This section describes how you can refresh a summary folder. You might need to refresh a summary folder if the database has changed.

To manually refresh a summary folder:

1. Select the summary folder that you want to refresh in the "[Workarea: Summaries tab](#)".
2. Choose Tools | Refresh Summaries to display the "[Refresh Summaries dialog](#)".

**Note:** Discoverer does not display the Refresh Summaries dialog for externally managed summary folders.

**Figure 15–23** Refresh Summaries dialog



3. Specify when you want to refresh the selected summary folder as follows:
  - select the **Refresh the summary immediately** radio button if you want to refresh the summary folder immediately
  - select **Schedule the refresh at a later time** radio button if you want to refresh the summary folder at a specified time

4. If you selected **Schedule the refresh at a later time**, specify the date and time when you want the refresh to begin.
5. To perform an incremental refresh, select the check box.

You might want to perform an incremental refresh when the detail data in the database tables has changed little since the last refresh. Performing an incremental refresh saves time, as it updates only those changes committed to the database since the last refresh.

For further information on the conditions required for incremental refresh, see *Oracle9i Data Warehousing Guide*.

### Notes

- Sometimes you will want to refresh a summary folder when a process outside Discoverer has completed (e.g. the loading of data into a data warehouse). You can refresh a summary folder from a batch command file using the Discoverer's command line interface option (for more information, see [Chapter 21, "/refresh\\_summary"](#)).

For more information about refreshing summary folders, see:

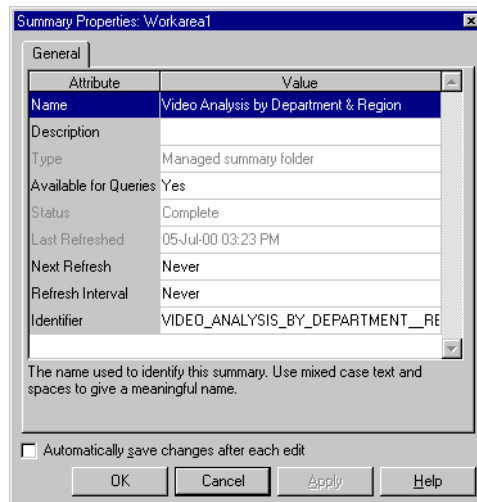
- [Chapter 16, "About refresh options for Oracle 8.1.7 databases \(or later\)"](#)
- [Chapter 16, "About refreshing summary folders following import between Oracle databases"](#)

## How to edit the properties of summary folders

This section describes you how to edit the properties of a summary folder.

To edit the properties of a summary folder:

1. Select one or more summary folders in the "[Workarea: Summaries tab](#)"
2. Choose Edit | Properties to display the "[Summary Properties dialog](#)".

**Figure 15–24 Summary Properties dialog**

**Hint:** You can select more than one summary folder at a time by holding down the Ctrl key and clicking another summary folder. If all the selected folders have the same value for a particular property, that value is shown. If the selected folders have different values for a particular property, no value is shown for the property. Any changes you make here are applied to all selected summary folders.

3. Make your changes as required.
4. Click OK to save the changes you have made.

## How to edit summary folders

You might want to edit a summary folder to:

- change its name or description
- view or edit its properties
- refresh it
- alter its composition (e.g. change items or combinations)
- view or modify database storage properties

- investigate the composition of a broken summary folder and remove broken folders

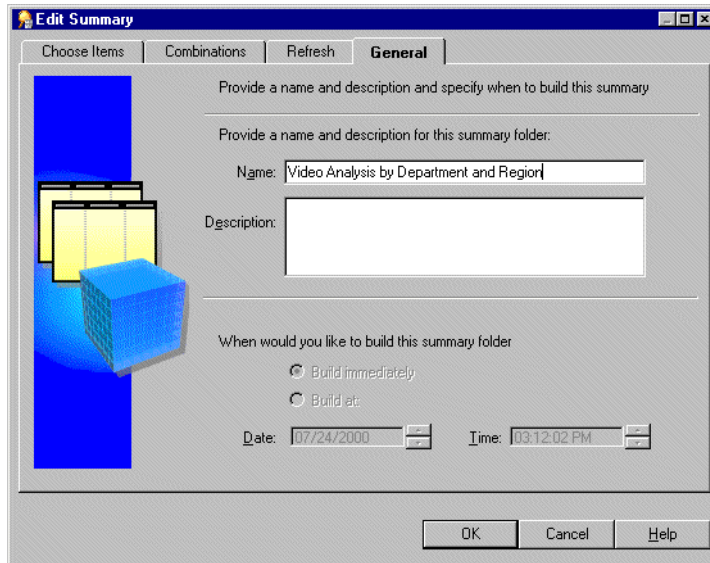
## Notes

You can edit summary folders, regardless of whether they are valid or broken.

To edit a summary folder:

1. Display the "Workarea: Summaries tab".
2. Select the + symbol next to a business area to display its available summary folders.
3. (optional) Choose View | Validate folders to display diagnostic folder information, if required.
4. Click the summary folder and choose Edit | Edit...

**Figure 15–25 Edit Summary dialog: General tab**



5. Edit the summary folder as required.

The Edit Summary dialog is divided into four tabs. Each tab corresponds to a step of the Summary Wizard as follows:

- "Edit Summary dialog: Choose items tab" - use this tab to specify the items in a summary folder.
- "Edit Summary dialog: Combinations tab" - use this tab to edit, add, or delete summary combinations. You can also use this tab to view and configure database storage properties of materialized views or summary tables (depending on database version).

**Note:** The Combinations tab is not displayed for summary folders that are based upon external summary tables.

- "Edit Summary dialog: Refresh tab" - use this tab to set the refresh and refresh interval of the summary folder.
- "Edit Summary dialog: General tab" - use this tab to edit the name, description and to view the build time of the summary folder.

6. Click OK.

### Notes

- If a summary folder is broken, you can view the status of folders within the summary folder by choosing View | Validate Folders. If Discoverer detects a problem with a folder within a summary folder, an error message is displayed beside the folder.
- If a summary folder remains broken following an edit, any modifications made in Discoverer are not written to the materialized view or summary table. Where a summary folder is valid following an edit, any modifications made in Discoverer are also written to the materialized view/summary table.

## How to edit database storage properties of summary combinations for a summary folder

You can use Discoverer Administrator to control how summary combinations (for a summary folder) are stored in the database, by editing the database storage properties.

**Note:** Database storage properties are not available for summary folders that are based on external summary tables.

For more information, see [Chapter 16, "What is different about summary folders that are based on external summary tables?"](#).

To edit the database storage properties of summary combinations for a summary folder:

1. Select a summary folder from the "[Workarea: Summaries tab](#)".
2. Choose [Edit | Edit...](#) to display the Edit Summary dialog.
3. Display the "[Edit Summary dialog: Combinations tab](#)".
4. Select the summary combination with database storage properties that you want to edit.
5. Click [Properties](#) to display the Database Storage Properties dialog (see "[Database Storage Properties dialog: List of tabs](#)").
6. Display the appropriate tab and edit the values as required.

For more information about the Database Storage Properties dialog tabs, see:

- "[Database Storage Properties dialog: Properties tab](#)"
- "[Database Storage Properties dialog: Mappings tab](#)"
- "[Database Storage Properties dialog: Tablespace tab](#)"
- "[Database Storage Properties dialog: 8i Properties tab](#)"

## How to delete summary folders

This section describes how you can delete a summary folder. When you delete a summary folder, the underlying summary tables or materialized views are also deleted.

To delete a summary folder:

1. Select the summary folder that you want to delete from the "[Workarea: Summaries tab](#)".

**Hint:** You can select more than one summary folder at a time by holding down the Ctrl key and clicking another summary folder.

2. Choose [Edit | Delete](#) to display the "[Confirm Delete dialog](#)".

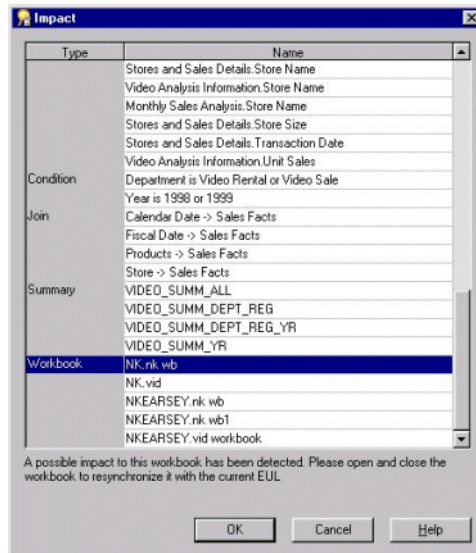
You can review the objects that might be affected by deleting this summary folder.

3. (optional) To see the potential impact of the deletion:



- a. Click Impact to display the "Impact dialog".  
The Impact dialog shows other objects that might be affected by the deletion.
- b. (optional) Select a row to view text indicating what affect the current action will have on the EUL object.

**Figure 15–26 Impact dialog**



- c. When you have finished reviewing the impact of deleting the summary folder, click OK to close the Impact dialog.
4. If you still want to delete the selected summary folder click Yes.  
Discoverer Administrator deletes the selected summary folder from the EUL and drops the summary table/materialized view from the database.

## How to view the status of the summary tables/materialized views for a summary folder

This section describes how you can view the status of the summary table/materialized view for a summary folder.

To view the status of the summary table/materialized view for a summary folder:

1. Select the summary folder that contains the summary table or materialized view you are interested in from the "[Workarea: Summaries tab](#)".
2. Choose Edit | Edit... to display the Edit Summary dialog
3. Display the "[Edit Summary dialog: Combinations tab](#)".
4. Select the numbered column heading for the summary combination that corresponds to the summary table materialized view you are interested in.

Discoverer displays the status of the summary table/materialized view in the status bar at the bottom of the dialog.

5. When you have finished viewing the status of the summary table/materialized view (represented by the summary combination), click OK to close the Edit Summary dialog.

### Notes

The status is not available for summary folders that are based upon external summary tables.

To see additional diagnostic information in the "[Workarea: Summaries tab](#)" use the View | Validate Folders option. This displays any errors that exist within the folders of a summary folder.

For more information about validating folders and summary status messages, see:

- "[Summary Properties dialog](#)"
- [Chapter 5, "How to validate folders in a business area"](#)

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## Additional information about summary folders

### Additional information about summary folders

This chapter provides additional information about Discoverer summary folders and contains the following topics:

- "What is the context and future for Discoverer's use of summary tables/materialized views?"
- "What is query rewrite?"
- "What are the conditions for query rewrite by Discoverer?"
- "About viewing the SQL and execution plan for query rewrite in Discoverer"
- "About configuring how Discoverer displays SQL in the SQL Inspector dialog"
- "Examples of execution plan (in Discoverer) using/not using a materialized view"
- "Example of the SQL (in Discoverer) where Discoverer rewrites the query"
- "Example illustrating the advantages of rewriting a query to use a summary table"
- "What characteristics differ between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or later)?"
- "What is different about summary folders that are based on external summary tables?"
- "What is different between mapping external summary tables and views to EUL items, with Oracle 8.1.7 databases (or later)?"

- "About refresh options for Oracle 8.1.7 databases (or later)"
- "About refreshing summary folders following import between Oracle databases"

## What is the context and future for Discoverer's use of summary tables/materialized views?

Discoverer created the concept of rewriting a query to use a summary table. The idea of creating a summary table and having the SQL automatically rewritten was patented by Oracle.

It became clear that this functionality would be useful for all database users, so Oracle moved the functionality to the database. Discoverer uses materialized views and query rewrite whenever possible and still supports its original query rewrite to Discoverer summary tables if not.

The long term direction is to work with the server query rewrite mechanism and gradually remove the Discoverer-specific mechanism.

## What is query rewrite?

Discoverer uses query rewrite under the following database conditions:

- With Oracle 8.1.7 databases (or later) Discoverer sends a query to the database and the database decides whether a suitable materialized view exists for the query rather than accessing the detail data tables. If one does exist, the database rewrites the query to use the materialized view.
- With Oracle 8.1.5 databases (or earlier). Discoverer rewrites the query to use a suitable summary table rather than accessing the detail data tables.

With Oracle 8.1.7 databases (or later) when mapping a view to items in the EUL, Discoverer rewrites the query to use a suitable summary table.

Query rewrite is transparent to the Discoverer end user and provides exactly the same results as queries that run against the detail tables but returns the results in far less time.

**Note:** Before query rewrite can be used, the option to use summary folders must be set in Discoverer Plus (for further information, see the *Oracle 9iAS Discoverer Plus User's Guide*).

For more information about the rules regarding Oracle 8.1.7 database (or later) rewrite scenarios, see the *Oracle9i Data Warehousing Guide*.

## What are the conditions for query rewrite by Discoverer?

Discoverer rewrites a query to use a summary table instead of the detail data when all of the following conditions are met:

- All the items specified in a query must either:
  - exist in a single summary combination  
For more information, see [Chapter 15, "What are summary combinations?"](#).
  - be able to be joined to a summary table via foreign keys that exist in a summary combination
- Where derived items are used, you must include in the summary combination:
  - the derived items
  - the components used to create the derived items  
For more information about derived items, see [Chapter 11, "What are derived items?"](#).
- Where items are from complex folders, create another summary folder using the same combination of items, but from the source (simple) folders.  
For more information about complex folders, see [Chapter 5, "What are complex folders?"](#).
- Join paths specified in the query must match those specified in the summary combination that satisfies the query. This ensures that the summary result set data matches that in the detail data tables.

However, you can define queries using fewer joins than specified in the summary table, provided that you clear the **Detail foreign keys can have NULL values** check box in the "Join Options dialog".

**Note:** To display the Join Options dialog, click Options... in the "New Join/Edit Join dialog".

- The summary folder must have the **Available for Queries** property set to Yes  
For more information about summary folder properties, see [Chapter 15, "How to edit the properties of summary folders"](#).
- The conditions specified on the Query Governor tab of the Options dialog in Discoverer Plus must be met.

For more information, see the *Oracle 9iAS Discoverer Plus User's Guide*.

- The Discoverer end user running the query must have database SELECT access to the summary table.

For more information about the privileges required to create summary folders, see [Chapter 15, "What are the prerequisites for creating summary folders manually in Discoverer?"](#).

## About viewing the SQL and execution plan for query rewrite in Discoverer

To view the SQL sent to the database server and the execution plan that the database server uses to return the results data from a query, you use the SQL Inspector dialog in Discoverer Plus. The SQL Inspector dialog displays the SQL and includes the name of the materialized view or the summary table used. For more information about the SQL Inspector dialog, see the *Oracle 9iAS Discoverer Plus User's Guide*.

## About configuring how Discoverer displays SQL in the SQL Inspector dialog

In Oracle9iAS Discoverer Plus and Oracle9iAS Discoverer Desktop, end users can look at SQL being generated by Discoverer to create worksheets. The SQL that is shown in the SQL Inspector is not necessarily the same as that which is sent to the RDBMS.

Discoverer always sends SQL that contains inline views to the RDBMS. Because inline views can be difficult for end users to read, you can configure Discoverer to reformat SQL to make it easier to read. Reformatted SQL is also known as 'flattened' SQL.

To configure how Discoverer displays SQL, edit the `\Discoverer5\Database\SQL-Type` registry setting (for more information, see "[Discoverer registry settings](#)" and "[How to edit Discoverer Administrator and Discoverer Desktop registry settings](#)").

## Examples of execution plan (in Discoverer) using/not using a materialized view

You can tell whether a query is subject to query rewrite by invoking the SQL Inspector dialog in Discoverer Plus. The table below illustrates how the server execution plan might be displayed when used in a query for which no suitable materialized

view exists. In this example the server completes a full table scan of three VIDEO5 data tables to return the result set.

**Table 16–1 Example execution plan for a Discoverer Plus query where the VIDEO5 tables are accessed and no materialized view is used**

A SQL statement that Discoverer displays in the SQL Inspector dialog: Plan tab
<pre> SELECT STATEMENT SORT GROUP BY TABLE ACCESS FULL VIDEO5.Sales TABLE ACCESS FULL VIDEO5.Product TABLE ACCESS FULL VIDEO5.Time                     </pre>

The table below illustrates how the server execution plan might be displayed when used in a query for which a suitable materialized view exists. In this example the server uses the materialized view to return the result set.

**Table 16–2 Example execution plan for a Discoverer Plus query where the server rewrites the query to use a materialized view**

An execution plan that Discoverer displays in the SQL Inspector dialog: Plan tab
<pre> SELECT STATEMENT SORT GROUP BY TABLE ACCESS FULL NICK.EUL5_MV101510                     </pre>

The SQL statement in the table above illustrates how the server can rewrite a query to use a suitable materialized view.

The materialized view is identified in the execution plan by the table name EUL5\_MV{Identifier}

## Example of the SQL (in Discoverer) where Discoverer rewrites the query

When Discoverer runs against an Oracle 8.1.5 database (or earlier), Discoverer controls query rewrite to use a suitable summary table. Discoverer displays the SQL sent to the database server in the SQL Inspector dialog: SQL tab.

The table below displays the SQL statement used for a Discoverer worksheet using items from the Video Analysis folder (for more information, see *Oracle9i Discoverer Administrator Tutorial*). The SQL statement shows that the summary table EUL5\_SUM100750 is referenced.

**Table 16–3 Example Discoverer Plus SQL statement showing how a query is rewritten to use the summary table EUL5\_SUM100750**

**A SQL statement that Discoverer Plus might display in the SQL Inspector dialog: SQL tab**

```
SELECT EUL5_SUM100750,"Department", EUL5_SUM100750, "Region",
EUL5_SUM100750,"Calendar Date Year", SUM(EUL5_
SUM100750,"Profit SUM")
FROM ADMIN_TUTORNF806.EUL5_SUM100750 EUL5_SUM100750
GROUP BY EUL5_SUM10075."Department", EUL5_SUM10075."Region",
EUL5_SUM10075."Calendar Date Year";
```

Discoverer automatically chooses the most appropriate summary table to process the query efficiently. This action is completely transparent to the Discoverer end user.

The next table below displays the SQL statement for the same Discoverer worksheet as above, except that the end user has now drilled down from Year to Month.

The SQL statement shows that Discoverer has rewritten the first part of the query to the summary table EUL5\_SUM100750 (as above). However, Discoverer has rewritten the second part of the query (the drill down) to the summary table EUL5\_SUM100774.



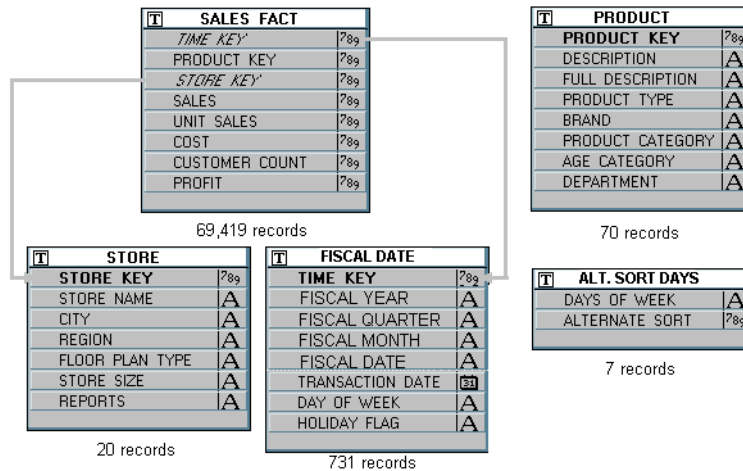
**Table 16–4 Example Discoverer Plus SQL statement showing how the drill down section of the query is rewritten to a summary table EUL5\_SUM10074**

<p><b>A SQL statement that Discoverer Plus might display in the SQL Inspector dialog: SQL tab following a drill down</b></p> <pre> SELECT EUL5_SUM100750,"Department", EUL5_SUM100750, "Region", EUL5_SUM100750,"Calendar Date Year", SUM(EUL5_ SUM100750,"Profit SUM") FROM ADMIN_TUTORNF806.EUL5_SUM100750 EUL5_SUM100750 GROUP BY EUL5_SUM100750."Department", EUL5_ SUM100750."Region", EUL5_SUM100750."Calendar Date Year"; SELECT EUL5_SUM100774,"Department", EUL5_SUM100774, "Region", EUL5_SUM100774,"Calendar Date Month", EUL5_ SUM100774,"Calendar Date Year", SUM(EUL5_SUM100774,"Profit SUM") FROM ADMIN_TUTORNF806.EUL5_SUM100774 EUL5_SUM100774 WHERE (EUL5_SUM100774."Calendar Date Year" = TO_ DATE('200001011000000','YYYYMMDDHH24MISS')) GROUP BY EUL5_SUM100774."Department", EUL5_ SUM100774."Region", EUL5_SUM100774,"Calendar Date Month", EUL5_SUM100774."Calendar Date Year"; </pre>
--

## Example illustrating the advantages of rewriting a query to use a summary table

This example consists of five tables, one of which has almost 70,000 records (for more information, see the figure below). The schema and data are taken from the tutorial data.

**Figure 16–1 Example schema and data**



Consider a query requiring the following items:

- Region - (from the STORE table)
- Department - (from the PRODUCT table)
- Fiscal Year - (from the FISCAL DATE table)
- SUM (Dollar\_Profit) - (from the SALES FACT table)

This would require a five-table join and an aggregation of all matching rows in SALES\_FACT (the table with almost 70,000 rows). Producing results for the query could take several minutes depending on the capability of the server.

On the other hand, if the query could be rewritten to use a single table that already contains the data for Region, Department, Fiscal Year, and SUM (Profit) (see the Sample summary table figure), then the query would produce an almost instantaneous response.

What characteristics differ between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or

**Figure 16–2 Sample summary table**

EUL5_SUM100801	
DEPARTMENT	A
REGION	A
YEAR	81
QUARTER	81
MONTH	81
COUNT SALES	?89
COUNT COST	?89
COUNT PROFIT	?89
COUNT UNIT SALES	?89
SUM SALES	?89
SUM COST	?89
SUM PROFIT	?89
SUM UNIT SALES	?89

The Sample summary table above stores the information needed by the query at the month level, and only has to be aggregated to the year level. Discoverer therefore uses a single table rather than aggregating from a five table join and performing a full table scan.

## What characteristics differ between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or later)?

A number of characteristics differ between summary folders when using different database versions and are compared in the following table:

For more information about summary folders, see [Chapter 14, "About folders and summary folders in Discoverer"](#) and [Chapter 15, "What is manual summary folder creation?"](#).

**Table 16–5 Comparison between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or later)**

Question?	Oracle 8.1.5 databases or earlier	Oracle 8.1.7 databases or later
How are summary folders stored in the database?	Stored as summary tables	Stored as materialized views or summary tables
How are summary folders refreshed?	Full refresh only	Full or incremental refresh
What kind of refresh is available?	Refresh is On Demand only	Refresh can be On Demand/On Commit

**Table 16–5 Comparison between summary folders in Oracle 8.1.5 databases (or earlier) and Oracle 8.1.7 databases (or later)**

<b>Question?</b>	<b>Oracle 8.1.5 databases or earlier</b>	<b>Oracle 8.1.7 databases or later</b>
How is refresh performed?	Discoverer performs the refresh	The server performs the refresh
What performs the summary rewrite?	Discoverer performs the summary rewrite	The server performs the query rewrite
What are the terms used to define summary folders?	Summary folders are defined in terms of items and folders	Summary folders are defined in terms of tables and columns
Can other applications take advantage of them?	No, only Discoverer	Yes, other applications can take advantage of materialized views

### **Notes**

Since materialized views are stored in the server, they are available for refresh by other client applications. For example, a materialized view created when using Discoverer can be refreshed through SQL\*Plus using the supplied DBMS\_MVIEW package.

## **What is different about summary folders that are based on external summary tables?**

Discoverer creates summary folders based on:

- Discoverer summary tables or materialized views
- external summary tables

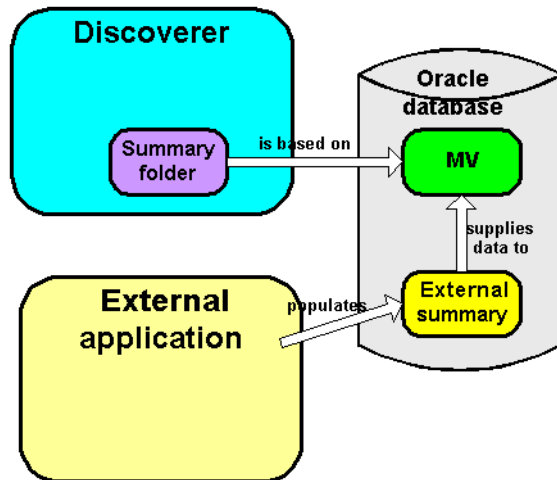
The main differences about summary folders that are based on external tables are outlined below.

**Table 16–6** *The main differences between summary folders based on Discoverer summary tables/materialized views and summary folders based on external summary tables*

Question?	Summary folders based on Discoverer summary tables/materialized views	Summary folders based on external summary tables
How are they populated and maintained?	Automatically by Discoverer Administrator or the Oracle 8.1.7 database (or later).	Using another application (e.g. SQL*Plus).
How are they created?	Using Discoverer Administrator.	Using another application.
How are they refreshed?	Automatically at regular intervals (defined by the Discoverer manager in Discoverer Administrator).	Using another application.

The figure below illustrates how Discoverer creates a summary folder that is based on a Materialized View. The Materialized View is supplied with data from an external summary, which is populated by an external application.

**Figure 16–3** *Discoverer using external summaries*



When you create a summary using Discoverer Administrator, you specify how the summary is refreshed, which is in one of the following ways:

- by Discoverer - the **Manage the refresh of this summary** check box has been selected on the "[Refresh Summary Folder dialog](#)"
- by an external application - the **Manage the refresh of this summary** check box has been cleared on the "[Refresh Summary Folder dialog](#)"

External summary tables are useful when:

- you are working with existing warehouse applications that have already generated the summary tables using some other method and you want to maintain them externally
- you are using a non-Oracle database

**Note:** If you are using a non-Oracle database, Discoverer only supports external summary tables and will not create summary folders.

## What is different between mapping external summary tables and views to EUL items, with Oracle 8.1.7 databases (or later)

You can create summary folders in Discoverer Administrator by mapping external summary tables or views to EUL items, with Oracle 8.1.7 databases (or later). However, when you map a view to EUL items, materialized views are not created. This is a restriction imposed by Oracle 8.1.7 (or later) databases. Where materialized views are not created, query rewrite to Discoverer summary tables is used instead. For more information about query rewrite, see "[What is query rewrite?](#)".

The differences are highlighted in the table below:

**Table 16–7 Mapping external summary tables or views to EUL items with Oracle 8.1.7 databases (or later)**

Mapping a table	Mapping a view
Where an external summary table is mapped to EUL items, a materialized view definition is created.  In this case the materialized view definition is used for the Oracle 8.1.7 database's (or later) query rewrite.	Where an external view is mapped to EUL items, a materialized view is not created.  In this case summary folders behave in the same manner as for Oracle 8.1.5 databases (or earlier) where Discoverer rewrites queries to use Discoverer summary tables.

## About refresh options for Oracle 8.1.7 databases (or later)

Oracle 8.1.7 databases (or later) support incremental refresh (when available) enabling you to work with large data warehouses/databases. Parallelism (for more information, see below) is also supported for the refresh operation.

For further information on the conditions required for incremental refresh, see *Oracle9i Data Warehousing Guide*.

## About refreshing summary folders following import between Oracle databases

### **Export from an Oracle 8.1.5 database (or earlier) to an Oracle 8.1.7 database (or later)**

If you export a business area with summary folders from an Oracle 8.1.5 database (or earlier) and then import it into an Oracle 8.1.7 database (or later), materialized views need to be created for these summary folders. For the database server to create the materialized views, you must refresh the summary folders in Discoverer.

### **Export from an Oracle 8.1.7 database (or later) to an Oracle 8.1.5 database (or earlier)**

If you export a business area with summary folders from an Oracle 8.1.7 (or higher) database and then import it into a Oracle 8.1.5 database (or earlier), Discoverer needs to create summary tables based on the summary folders. For Discoverer to do this, you must refresh the summary folders.





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# Using Discoverer with Oracle Applications

## Using Discoverer with Oracle Applications

This chapter explains how Discoverer supports access to Oracle Applications databases using Oracle Applications security and contains the following topics:

- "What are Oracle Applications?"
- "What are Oracle Applications responsibilities?"
- "What features does Discoverer support for Oracle Applications users?"
- "What are the prerequisites for using Discoverer with Oracle Applications?"
- "What is different about running Discoverer in Oracle Applications mode?"
- "How to configure the Connect dialog for Oracle Applications users"
- "How to create an Oracle Applications EUL"
- "How to grant task privileges to all Oracle Applications users via the Public user"
- "How to specify the Oracle Applications users/responsibilities who can access a business area"
- "How to specify the business areas that an Oracle Applications user/responsibility can access"
- "How to specify the tasks an Oracle Applications user or responsibility can perform"
- "How to specify the Oracle Applications users/responsibilities who can perform a specific task"

## What are Oracle Applications?

Oracle Applications are Oracle's integrated enterprise resource planning (ERP) and customer relationship management (CRM) solutions. Oracle Applications enable companies to run and manage their worldwide operations from a central site. For further information see <http://www.oracle.com/>.

## What are Oracle Applications responsibilities?

Oracle Applications responsibilities are akin to database roles. They are an abstraction to which privileges can be assigned and which can apply to many users. Oracle Applications responsibilities are used to control Oracle Applications users functional and data access.

An Oracle Applications user connects to an Oracle Applications database and chooses a single Oracle Applications responsibility. Each Oracle Applications responsibility can have a set of privileges associated with it.

This means that an Oracle Applications user will by default assume the task privileges granted to the chosen responsibility (for more information see "[How to specify the Oracle Applications users/responsibilities who can perform a specific task](#)"). To change responsibility but keep the same user you must reconnect.

## What features does Discoverer support for Oracle Applications users?

Discoverer supports the following features for Oracle Applications:

- Ad-hoc query access to Oracle Applications databases using Oracle Applications user names, passwords and responsibilities
- Oracle Applications mode EULs

An Oracle Applications mode EUL is a Discoverer End User Layer based on an Oracle Applications schema (containing the Oracle Applications FND (Foundation) tables and views). Oracle Applications EULs employ Oracle Applications user names and responsibilities whereas standard EULs use database users and roles.

The only database user (i.e. non-Oracle Applications user) that can connect to an Oracle Applications mode EUL is the EUL owner. The EUL owner is the database user that is used to create the EUL. However, the EUL owner can grant administration privileges to Oracle Applications users. The authorized Oracle Applications users can then connect to the Oracle Applications mode EUL using Discoverer Administrator.

- Oracle Applications row level security  
Many Oracle Applications tables and views are user-sensitive, and will return different results depending on which user/responsibility is used to access these tables/views. Discoverer correctly runs queries that respect these user-sensitive tables and views.
- Oracle Applications multiple reporting currencies  
When connecting to Discoverer as an Oracle Applications user/responsibility, Discoverer will automatically connect to the correct schema (either APPS or APPS\_MRC) to support Oracle Applications instances that have implemented the multiple reporting currencies feature.
- Oracle Applications multiple organizations  
Using Discoverer with Oracle Applications multiple organizations support enables you to work with data from more than one organization. Discoverer end users can query and analyze data from a set of organizations to which they have been granted access. The folders in the EUL you are connecting to must be based on Oracle Business Views (available in Oracle Applications 11i).

These features are only available when Discoverer is running in Oracle Applications mode. In other words, when Discoverer is running with an Oracle Applications mode EUL against an Oracle Applications database.

## What are the prerequisites for using Discoverer with Oracle Applications?

To start Discoverer as an Oracle Applications user the following conditions must be met:

- Oracle Applications must be installed before Discoverer can be used in applications mode
- Discoverer must be running against one of the following Oracle Applications versions:
  - Release 10.7
  - Release 11
  - Release 11i

## What is different about running Discoverer in Oracle Applications mode?

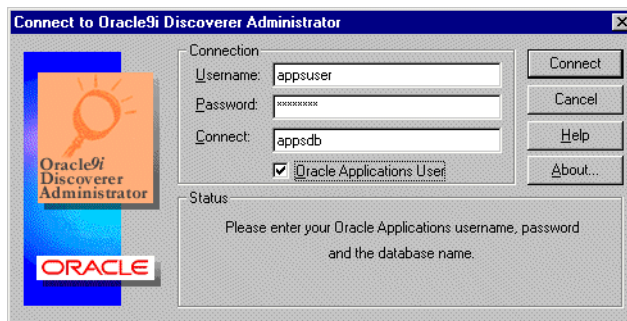
The following differences apply in Discoverer when running in Oracle Applications mode:

- ["Differences with the Discoverer Connect dialog in Oracle Applications mode"](#)
- ["Differences with Discoverer security in Oracle Applications mode"](#)
- ["Differences with Discoverer summary folders in Oracle Applications mode"](#)
- ["Differences with Discoverer and secure views/language settings in Oracle Applications mode"](#)

### Differences with the Discoverer Connect dialog in Oracle Applications mode

When you run Discoverer in Oracle Applications mode the ["Connect to Oracle9i Discoverer Administrator dialog \(for Oracle Applications users\)"](#) will either display or not display the Oracle Applications user check box.

**Figure 17-1** *Connect to Oracle9i Discoverer Administrator dialog (for Oracle Applications users)*



For more information, see ["How to configure the Connect dialog for Oracle Applications users"](#).

The following conditions apply when the Connect dialog is configured for Oracle Applications users:

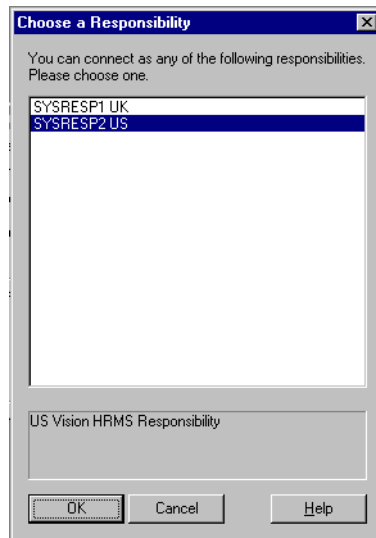
- if the Oracle Applications user check box is not displayed you connect to Discoverer as an Oracle Applications database user

- if the Oracle Applications user check box is displayed, you select the check box to connect to Discoverer as an Oracle Applications user. Alternatively, you may leave it unselected to connect as an Oracle database user.

Once you have entered details into the Connect dialog and clicked OK a Responsibilities dialog is displayed and you can choose the responsibility with which to connect (if the Oracle Applications user you are connecting with has more than one responsibility).

You can bypass the Choose a Responsibility dialog by entering both the Oracle Applications user and the responsibility into the **Username** field in the form 'user:responsibility'.

**Figure 17-2** Choose a Responsibility dialog



## Differences with Discoverer security in Oracle Applications mode

When you run Discoverer Administrator as an Oracle Applications user, then the Discoverer Privileges and Security dialogs display Oracle Applications user names and responsibilities. You can assign privileges and security to Oracle Applications user names and responsibilities. When you run Discoverer Administrator as a database user then the Discoverer Privileges and Security dialogs display database users and database roles.

For more information about using privileges to control access to information, see [Chapter 7, "About Discoverer and security"](#).

## Differences with Discoverer summary folders in Oracle Applications mode

As the Discoverer manager of an Oracle Applications mode EUL you must be aware of the following:

- Some Oracle Applications database views contain row level security and return differing result sets depending upon the currently active responsibility. This means that materialized views (summary tables in Oracle 8.1.5 databases or earlier) will contain different data depending on the responsibility of the user refreshing the external summary folder.
- A summary folder based on an Oracle Applications secure view or Oracle Applications business view must be registered in Discoverer as an external summary folder (for more information, see [Chapter 15, "How to create summary folders based on external summary tables"](#)).
- Where an external summary folder is mapped against a table or view with Oracle Applications row level security, it is your responsibility as Discoverer manager to make sure the external table or view provides secure access. If you are not sure, ask your database administrator.
- If a managed summary folder is found that satisfies a query (based on data with Oracle Applications row level security), Discoverer informs the end user that no rows satisfy the query criteria. Discoverer does this to ensure that end users do not see data they should not have access to.
- If a managed summary folder is found that satisfies a query (based on data without Oracle Applications row level security), Discoverer returns the rows unaffected. Discoverer does this because the data can be safely accessed by all end users.
- Some Oracle Applications views with row-level security support "public" rows (particularly Human Resources).

## Differences with Discoverer and secure views/language settings in Oracle Applications mode

When a Discoverer end user uses a workbook that accesses Oracle Applications secure views, the user might see different results on different machines (even when using the same connection information) if the machines have different local language (NLS) settings.

When using Oracle Applications secure views, the local language setting of the machine affects the data retrieved by Discoverer. Discoverer will display data consistently across machines with the same language setting.

To change a machines local language setting (on Windows NT), choose Start | Settings | Control Panel | Regional Settings and change the language value.

For more information on secure views, see [Chapter 20, "How to use query prediction with secure views"](#).

You can also define a language setting (NLS) for a user, responsibility, application or site using the Profiles setting in Oracle Applications. For more information see the Oracle Applications documentation.

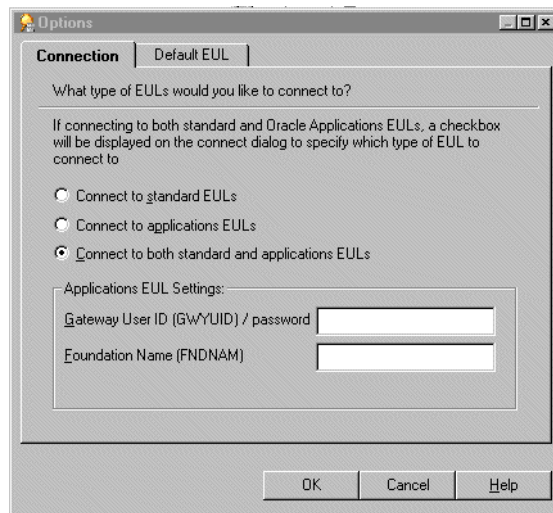
## How to configure the Connect dialog for Oracle Applications users

Before you connect to Oracle Discoverer as an Oracle Applications user, you must configure the Connect dialog to default to Oracle Applications users.

To configure the Connect dialog for Discoverer Administrator and Discoverer Desktop:

1. Select Tools | Options to display the "[Options dialog: Connection tab](#)":

**Figure 17–3 The Options dialog: Connection tab**



2. Specify the type of EUL to connect to by selecting one of the following option:

Option	Use this option to:
Connect to standard EULs	The <b>Oracle Applications User</b> check box is not displayed in the Connect dialog and Discoverer expects standard database users.
Connect to applications EULs	The <b>Oracle Applications User</b> check box is not displayed in the Connect dialog but Discoverer expects users to connect using an Applications user id/password and Oracle Applications database connect string.
Connect to both standard and applications EULs	The <b>Oracle Applications User</b> check box is displayed in the Connect dialog and (depending on whether the check box is cleared or selected) you can connect to either standard or Oracle Applications database EULs.

### Notes

- To configure the Connect dialog for Discoverer Desktop, repeat the steps described above for Discoverer Administrator, but within Discoverer Desktop.
- To configure the Connect dialog for Discoverer Plus and Viewer to validate Oracle Applications user names and passwords, see the *Oracle9iAS Discoverer Configuration Guide*.

### About entering details into the fields GWYUID/Password and FNDNAM

When you use the Options dialog: Connections tab and you select either the **Connect to applications EULs** radio button or the **Connect to both standard and applications EULs** radio button you can enter values into these fields, but Discoverer uses default values if you do not. The fields and default values are as follows:

- Gateway User ID (GWYUID)/Password  
You can enter your Gateway User ID and Password here (the default value used is 'applsypub/pub' if you enter nothing here).
- Foundation Name (FNDNAM)  
You can enter the Foundation Name (the default value used is 'apps' if you enter nothing here).

If you do not know the values to enter into the above fields contact your Oracle Applications database administrator.



## How to create an Oracle Applications EUL

You create an Oracle Applications EUL in two ways:

- using the Create EUL dialog
- using the command line interface

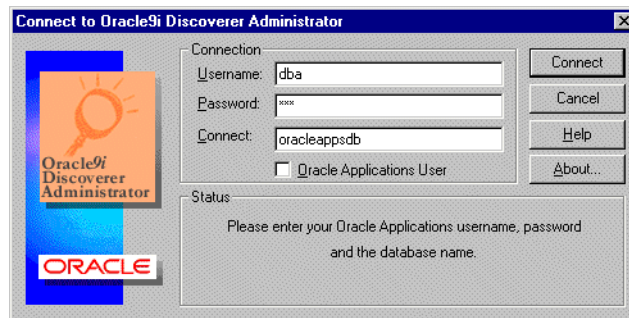
To create an Oracle Applications EUL using the Create EUL dialog:

1. Start Discoverer Administrator and display the "[Connect dialog](#)".
2. Enter the user name, password and connect string for a DBA user.

For example, dba/dbapassword@oracleappsdb.

**Note:** You must not specify the user name of an Oracle Applications user. The EUL owner is always a database user.

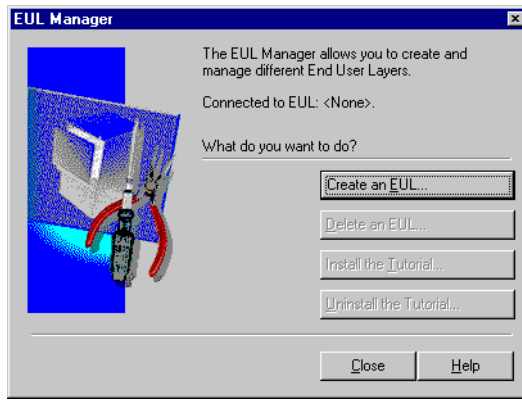
*Figure 17-4 Connect to Oracle9i Discoverer Administrator dialog*



**Note:** The Oracle Applications user Connect dialog may display the Oracle Applications User check box. For more information see "[How to configure the Connect dialog for Oracle Applications users](#)".

3. Clear the **Oracle Applications User** check box.
4. Click Connect.
5. If no EULs exist Discoverer displays a dialog for you to choose whether to create an EUL now. Click Yes.
6. Discoverer displays the "[EUL Manager dialog](#)".

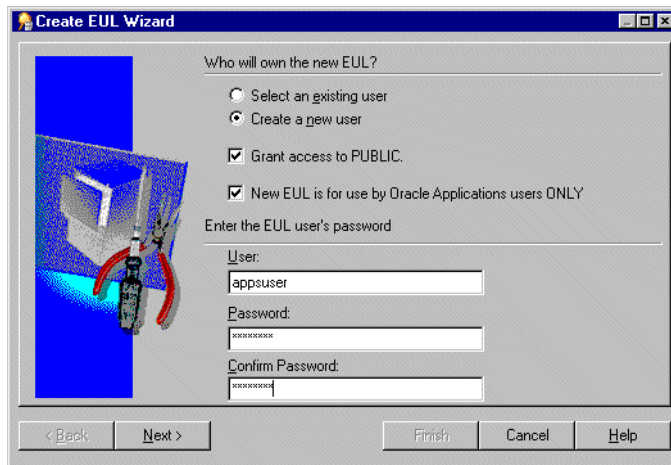
**Figure 17-5 EUL Manager dialog**



7. Click Create an EUL to display the "Create EUL Wizard dialog".

This is where you create a new database user and Oracle Applications EUL.

**Figure 17-6 Create EUL Wizard dialog**



8. Specify whether an existing or new user is to own the Oracle Applications EUL by selecting one of the following radio buttons:

- **Select an existing user**

then select a user from the drop down list in the **User** field

- **Create a new user**

then enter a user name, password/confirmation for the new user

**Note:** The EUL owner is always a database user. Please specify a database user.

9. (optional) Select the **Grant access to PUBLIC** check box.

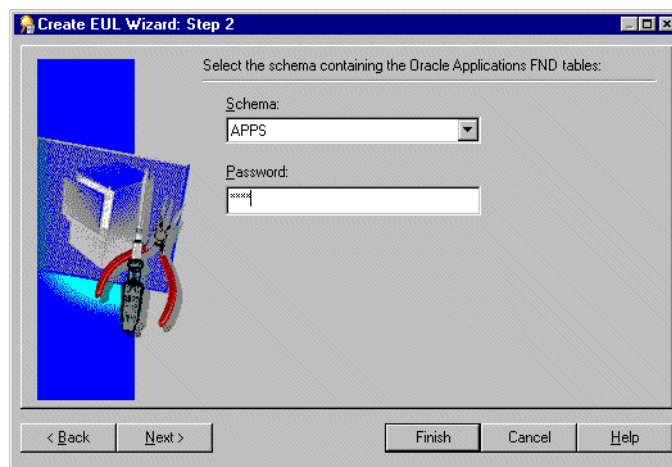
**Hint:** We recommend that you select the **Grant access to PUBLIC** check box to grant public access to your EUL tables.

If you want to explicitly give access to your EUL tables do not select the **Grant access to PUBLIC** check box. If you do not select the **Grant access to PUBLIC** check box you will need to grant access to your EUL tables manually.

10. Select the **New EUL is for Oracle Applications users ONLY** check box to create an Oracle Applications mode EUL.

11. Click Next to display the "[Create EUL Wizard: Step 2 dialog](#)" where you select the Oracle Applications schema and enter the schema password.

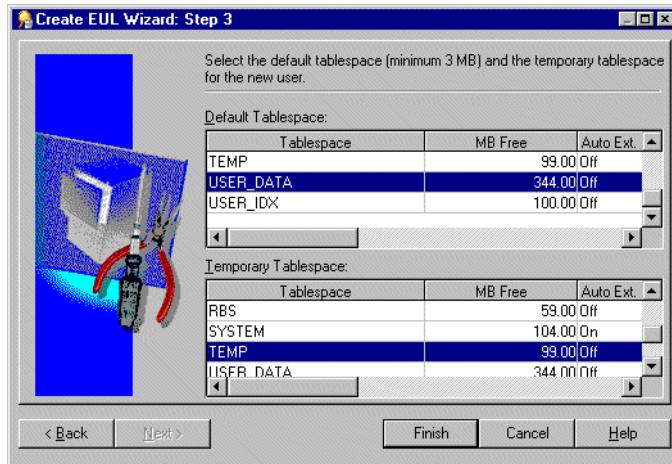
**Figure 17–7 Create EUL Wizard: Step 2**



12. Use the **Schema** drop down list to select the Oracle Applications schema containing the Oracle Applications FND tables.

13. Enter the password for the Oracle Applications schema and click Next.
14. (if creating a new user) If you are creating a new user Discoverer displays the "Create EUL Wizard: Step 3 dialog" where you select the default and temporary tablespaces for the new database user/schema.

**Figure 17–8 Create EUL Wizard Step 3**



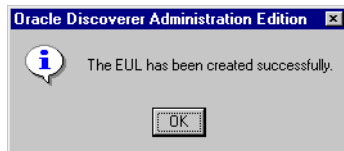
15. (if creating a new user) Highlight the required Default and Temporary tablespaces you want to use for the Oracle Applications EUL owner.

**Hint:** Ask your Oracle Applications database administrator if you are not sure.

16. Click Finish to create the tables and views for the new Oracle Applications mode EUL and populate them with default data.

Discoverer displays a dialog to confirm the creation of the new EUL:

**Figure 17–9 Create EUL wizard - success**



17. Click OK to close the confirmation dialog.

Discoverer displays a dialog that gives you the option to install tutorial data into the new EUL.

18. Click Yes or No to specify whether to install the tutorial data.

Discoverer displays a dialog that gives you the option to reconnect to the database as the owner of the new Oracle Applications EUL you have just created, or to remain connected as the DBA.

### Notes

- Having created an Oracle Applications EUL you can now:
  - grant task privileges to an Oracle Applications user so that they have the ability to carry out tasks in Discoverer Administrator or Discoverer Plus using this Oracle Applications EUL (for more information, see ["How to specify the tasks an Oracle Applications user or responsibility can perform"](#))
  - create a new business area using the Oracle Applications tables (for further information, see [Chapter 4, "What are business areas?"](#))
- When you create a new Oracle Applications business area, the schema objects you load into the business area must be based on secure views. This retains the row-level security associated with a specific Oracle Applications responsibility. Ask your Oracle Applications database administrator for further information.
- You can also create an Applications mode EUL via the command line (for more information see [Chapter 21, "/create\\_eul /apps\\_mode"](#)).

## How to grant task privileges to all Oracle Applications users via the Public user

You can grant task privileges to all Oracle Applications users in one action by using the Public user.

To grant task privileges to all Oracle Applications users:

1. Start Discoverer Administrator and connect as an Oracle Applications user.
2. Choose Tools | Privileges to display the ["Privileges dialog: Privileges tab"](#)

The Privileges dialog contains the Public user. The public user is not an Oracle Applications user but represents all Oracle Applications users. You can grant a privilege to every Oracle Applications user by granting that privilege to the Public user. You can subsequently modify individual users' privileges as required.

3. Grant privileges to the Public user as required.

For more information, see [Chapter 7, "How to specify the tasks a user or role \(responsibility\) can perform"](#).

## How to specify the Oracle Applications users/responsibilities who can access a business area

This task describes how to grant (or deny) access permission for business areas to specific users or responsibilities.

For information about Oracle Applications responsibilities, see ["What are Oracle Applications responsibilities?"](#).

**Note:** When completing the following task there is a notable difference between what Oracle database users and Oracle Applications users will see in the dialog:

- Oracle database users will see the words Users and Roles
- Oracle Applications database users will see the words Users and Responsibilities

For more information about this task see [Chapter 7, "How to specify a user or role \(responsibility\) that can access a business area"](#).

## How to specify the business areas that an Oracle Applications user/responsibility can access

This task describes how to specify which business areas a specific Oracle Applications user or responsibility can access.

For information about Oracle Applications responsibilities, see ["What are Oracle Applications responsibilities?"](#)

**Note:** When completing the following task there is a notable difference between what Oracle database users and Oracle Applications users will see in the dialog:

- Oracle database users will see the words Users and Roles

- Oracle Applications database users will see the words Users and Responsibilities

For information about this task see [Chapter 7, "How to specify the business areas a user or role \(responsibility\) can access"](#).

## How to specify the tasks an Oracle Applications user or responsibility can perform

This section describes how to specify the tasks a specific user or responsibility can perform.

For information about Oracle Applications responsibilities, see "[What are Oracle Applications responsibilities?](#)".

**Note:** When completing the following task there is a notable difference between what Oracle database users and Oracle Applications users will see in the dialog:

- Oracle database users will see the words Users and Roles
- Oracle Applications database users will see the words Users and Responsibilities

For information about this task see [Chapter 7, "How to specify the tasks a user or role \(responsibility\) can perform"](#).

## How to specify the Oracle Applications users/responsibilities who can perform a specific task

This section describes how to specify the users or responsibilities that can perform a specific task.

For information about Oracle Applications responsibilities, see "[What are Oracle Applications responsibilities?](#)".

**Note:** When completing the following task there is a notable difference between what Oracle database users and Oracle Applications users will see in the dialog:

- Oracle database users will see the words Users and Roles
- Oracle Applications database users will see the words Users and Responsibilities

For information about this task see [Chapter 7, "How to specify a user or role \(responsibility\) to perform a specific task"](#).





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# Using Discoverer with components of Oracle9i Application Server

## Using Discoverer with components of Oracle9i Application Server

This chapter explains how to use Discoverer with components of Oracle9i Application Server (Oracle9iAS), such as Oracle9iAS Web Cache and Oracle9iAS Portal, and contains the following topics:

- ["Using Discoverer with Oracle9iAS Enterprise Manager"](#)
- ["Using Discoverer with Oracle9iAS Reports"](#)
- ["Using Discoverer with Oracle9iAS Web Cache"](#)
- ["Using Discoverer with Oracle9i Warehouse Builder"](#)
- ["Using Discoverer with Oracle9iAS Portal"](#)

## Using Discoverer with Oracle9iAS Enterprise Manager

Oracle9iAS Enterprise Manager provides a common look and feel, behavior and security infrastructure to configure the middle tier web components of Oracle9iAS with a single tool. Using a single tool for all Oracle9iAS components reduces the time spent on administration and configuration. You can use Oracle9iAS Enterprise Manager to configure Discoverer's middle tier web components.

You can use Oracle9iAS Enterprise Manager to make the following settings for Discoverer's middle tier web components:

- Add new public connections.
- Delete public connections.

- Edit public connection name, description, default locale, username, password, database, EUL, login type, show database details, Oracle Applications responsibility, Oracle Applications security group.
- Switch on/off ability to create user defined connections.
- Set the time to wait in Viewer for a query before showing a progress page.
- Set the target version of the XML schema to use on the Servlet when running Viewer.
- Set the path on which to find the XSL style sheets when running Viewer.
- Set the minimum and maximum style sheets to pool when running Viewer.
- Set which transport to use when running Plus.
- Set how many sessions the Portlet Provider should pool.
- Set the minimum and maximum number of XSL style sheets to pool.
- Set the fallback default locale.
- Switch ON/OFF Graph.

For more information, see the Oracle9iAS Enterprise Manager Help topic - *Managing Oracle9iAS Discoverer*.

## Using Discoverer with Oracle9iAS Reports

Discoverer users can share workbooks, export them to Oracle9iAS Reports (V7.0 and later) enabling Reports users to open a Discoverer workbook. The workbook SQL, additional formatting and calculations are passed to Oracle9iAS Reports using an XML based workbook. The workbook is translated into an Oracle9iAS Reports-compatible format that can be modified using Oracle9iAS Reports.

In Oracle9iAS Reports the look and feel of the original Discoverer workbook is retained so that the Oracle9iAS Reports user can continue to work on the Report in a standalone fashion. To further emphasize this point: no further interaction with the Discoverer server is required for the Reports user to enhance the file

For more information, see the *Oracle9iAS Discoverer Plus User's Guide*.

## Using Discoverer with Oracle9iAS Web Cache

Oracle9iAS Web Cache helps e-businesses improve Web site performance issues. Oracle Web Cache is a content-aware server accelerator that improves the

performance, scalability and availability of Web sites that run on Oracle9i Application Server and Oracle8i databases (or later). High accessibility is achieved at high speed by applying the latest caching techniques provided by Oracle9iAS Oracle9iAS.

By storing frequently accessed URLs in memory, Oracle9iAS Web Cache eliminates the need to repeatedly process requests for those URLs on the application Web server. Unlike legacy proxy servers that handle only static documents, Oracle9iAS Web Cache caches both static and dynamically generated content from one or more application Web servers. Because Oracle9iAS Web Cache is able to cache more content than legacy proxy servers, it provides optimal performance by greatly reducing the load on application Web servers.

For more information, see the *Oracle9iAS Discoverer Plus and Viewer Configuration Guide*.

## Using Discoverer with Oracle9i Warehouse Builder

Oracle9i Warehouse Builder(OWB) can generate Discoverer metadata. You can use OWB and Discoverer Bridge to access OWB's meta layer and create a Discoverer export file (.EEX file). The .EEX file can be imported into a Discoverer EUL using Discoverer Administrator (for more information, see [Chapter 3, "How to import EUL objects from a file using the Import Wizard"](#)). The Discoverer EUL retains the folder and item lineage from OWB. You can display the folder and item lineage from OWB by using a Discoverer Lineage workbook. For more detailed information, see the Discoverer Release Notes.

## Using Discoverer with Oracle9iAS Login Server

The Oracle9iAS Login Server provides a framework which allows any web-based client, inside or outside of Oracle9iAS Portal, to use Oracle's Single Sign On (SSO) services. Oracle9iAS Login Server is intended for use with an LDAP server which provides the means for storing and managing all the user credentials.

## Using Discoverer with Oracle9iAS Portal

You can publish Discoverer workbooks and worksheets to Oracle9iAS Portal quickly and easily. Oracle9iAS Portal's intuitive user interface guides you through the publishing process step by step, enabling you to create powerful business intelligence portals with ease.

This section explains how to publish Discoverer content using Oracle9iAS Portal, and includes the following topics:

- ["What is Oracle9iAS Portal?"](#)
- ["About Oracle9iAS Portal"](#)
- ["What you need to publish Discoverer content in Oracle9iAS Portal"](#)
- ["About portlet types available in Discoverer"](#)
- ["About adding portlets"](#)
- ["How to add a list of database workbooks portlet"](#)
- ["How to add a worksheet portlet"](#)
- ["How to edit a portlet"](#)

## What is Oracle9iAS Portal?

Oracle9iAS Portal enables non-technical business users to create enterprise information portals (EIPs). EIPs are internet or intranet sites that provide a personalized, single point of interaction with a company's suite of applications. EIPs also enable you to provide a consistent look and feel to users. EIPs are specifically designed for easy access to different information providers, the presentation of which can be tailored to individual users' requirements.

Figure 18–1 An enterprise information portal developed using Oracle9iAS Portal 3.0

The screenshot shows a Netscape browser window titled "My CED Portal : Home - Netscape". The address bar shows "http://CEDportalcanoer.o/D/ceohome\_01.htm". The browser toolbar includes Back, Forward, Reload, Home, Search, Netscape, Print, Security, Snap, and Stop. The page content includes the Oracle logo, a personalized welcome message "Welcome, James Maxwell!", and navigation buttons for Login, Customize Desktop, Customize Mobile, Preferences, and Help. There are also buttons for Home, Manager, and Work.

Below the navigation area, there is a Search section with a "Categories" dropdown and a "Go" button. To the left is a Calendar for October 2000, showing a grid of dates from 1 to 31. Below the calendar are links for "Appointments", "Addresses", and "Resource Scheduler".

On the right side, there is a "Results Set" section titled "Analysis of Video Rentals and Video Sales". It shows "Department: Video Sales" and a table with the following data:

Region	Profit SUM			
	Year	1998	1999	2000
Central		667,084	697,921	668,495
East		610,555	614,462	610,637
West		627,097	607,177	622,092

Below the table, it says "Last updated: 15 NOV 2000 1:01 PM (refreshes every 2)" and provides a link "Open this worksheet in Discoverer".

## About Oracle9iAS Portal

Oracle9iAS Portal provides an easy-to-use framework for creating and maintaining EIPs. Using Oracle9iAS Portal, you define business portals consisting of a number of different areas (known as portlets). You can customize the presentation of portlets on a per user and/or per group basis.

For example, the example below shows a business intelligence (BI) portlet in an EIP. The BI portlet (called Analyze Sales Reports) contains links to three Discoverer workbooks (called Video Analysis, Regional Analysis, and Mike's sales areas). Users see different BI applications depending on their requirements.

**Figure 18–2 An example EIP containing a Business Intelligence portlet**

The screenshot shows a web page with a navigation bar at the top containing links for Home, Budget, Drq Chart, New Employees, and a Customize button. Below the navigation bar are several portlets:

- News**: Contains several news items with titles like "Oracle Buys Thinking Machines" and "Oracle Gets Analytical With Data Mining Acquisition".
- Analyze Sales Reports**: A Business Intelligence portlet containing a table with columns: Name, Updated, Accessed, Scheduled, and Description. It lists three workbooks: Video Analysis, Regional Analysis, and Mike's sales areas.
- Announcements**: Contains an announcement for "Festival of Colors" from 2000.
- My Picks**: A portlet with links for People Search, Scheduler, BugDE, Legal, Internal Orders, Corporate Cafes, Y2K Initiative, and Customer Newsgroups.
- Competition**: A portlet with links for Competitive Analysis, Product Benchmarks, Product Reviews, and Press Release.
- HR**: A portlet with links for My Benefits, Corporate Holiday, Vacation Balance, and 401k Portfolio.
- Expenditures**: A portlet with a table showing Dept and Total.

Key to figure:

- An EIP page.
- A Business Intelligence portlet containing links to Discoverer workbooks
- Examples of other portlets for different information providers. For example, commonly used applications (My Picks), competitor analysis (Competition), and human resources (HR).

## What you need to publish Discoverer content in Oracle9iAS Portal

To publish Discoverer content in Oracle9iAS Portal, you need:

- to register Discoverer as an Oracle9iAS Portal - see the Oracle9iAS Configuration Guide for more information.

- a Discoverer database account
- authentication as an Oracle9iAS Portal user - i.e. you must login to Oracle9iAS Portal
- privileges to create or customize pages in Oracle9iAS Portal, to allow you to add portlets to a portal page or customize portlets in a portal page

### Notes

Contact the Oracle9iAS Portal Administrator if you require create or edit page privileges.

## About portlet types available in Discoverer

Discoverer users can create two types of portlet for Discoverer content:

- a List of database workbooks portlet - see "[About the List of database workbooks portlet](#)"
- a Worksheet portlet - see "[About the Worksheet portlet](#)"

Discoverer content is generated when it is first published and optionally refreshed on a regular schedule.

### About the List of database workbooks portlet

A List of database workbooks portlet contains URL links to Discoverer workbooks. When you click a URL link in a workbook portlet, you open the selected workbook in Discoverer Viewer. Once in Discoverer Viewer, you can use Discoverer's powerful analytic features such as pivot, drill etc.

In the figure below, the Analyze Sales Reports portlet contains three URL links, to 'Video Analysis', 'Regional Analysis', and 'Mike's sales areas'.

**Figure 18–3** A workbook portlet in an Oracle9iAS Portal page

Name	Updated	Accessed	Scheduled	Description
<a href="#">Video Analysis</a>	28-MAY-2000	06-JUN-2000	28-JUN-2000	Sales for each...
<a href="#">Regional Analysis</a>	01-JUN-2000	14-JUN-2000	24-JUN-2000	Sales and profi...
<a href="#">Mike's sales areas</a>	02-JUN-2000	15-JUN-2000	25-JUN-2000	Best and worst...

### About the Worksheet portlet

A Worksheet portlet contains Discoverer worksheets and graphs.

**Note:** A link is provided to enable users to open the worksheet in Discoverer Viewer for further analysis (e.g. drill, pivot, etc.).

In the figure below, the worksheet portlet contains a Discoverer worksheet for analyzing profit figures for regions across two years.

**Figure 18–4** A worksheet portlet in an Oracle9iAS Portal page

		Profit SUM		
		Year	2001	2002
Region	City			
Central			\$74,735	\$95,486
East			\$115,690	\$147,786
West			\$65,113	\$80,115

## About adding portlets

Creating Discoverer portlets involves two steps:

- add a portlet with default settings - for more information, see ["How to add a list of database workbooks portlet"](#) and ["How to add a worksheet portlet"](#)
- edit the portlet to suit your needs and publish the results to portal users - for more information, see ["How to edit a portlet"](#)

### Notes

- Refer to the Oracle9iAS Portal Online Help for information about using the Oracle9iAS Portal toolbars and wizards.
- When you edit portlet pages, the **Edit defaults** options differs from the **Customize** option as follows:
  - **Edit defaults** - in this mode, changes that you make are visible to all users of the page.
  - **Customize** - in this mode, changes that you make are visible only to yourself.



## How to add a list of database workbooks portlet

You add a list of database workbooks portlet when you want to provide Discoverer workbook links to a page in Oracle9iAS Portal. For example, to publish a link for a sales workbook to colleagues in a sales department.

For more information, see:

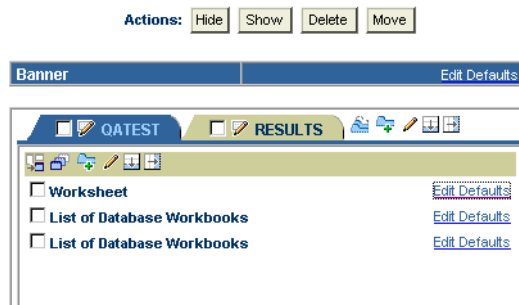
["About the List of database workbooks portlet"](#)

To add a List of database workbooks portlet:

1. Start an internet browser.
2. Display the portal page to which you want to add a Discoverer portlet.
3. If you are not already logged in, click Login and enter your login details.
4. Click **Edit Page** to display the "Modify the Contents of the Page" page.

### Modify the Contents of the Page

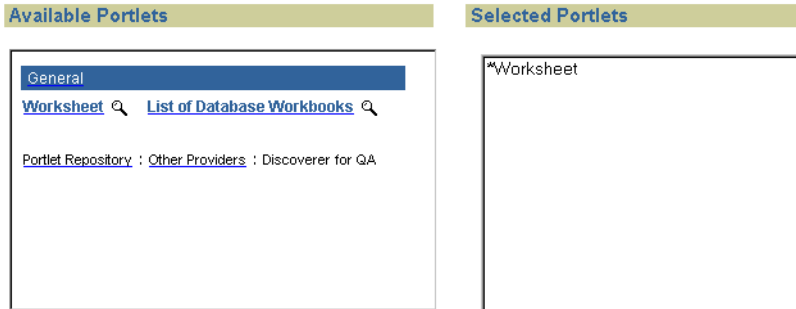
Add portlets to a region, or remove or edit existing portlets. You can also add, delete, or edit regions and tabs, and edit the page banner.



5. Click the **Add Portlets** icon to display the "Add Portlets to Region" page. To add portlets, you move portlets from the **Available Portlets** list to the **Selected Portlets** list.
6. In the **Available Portlets** area, choose Discoverer or navigate to where the Discoverer portlets are located.

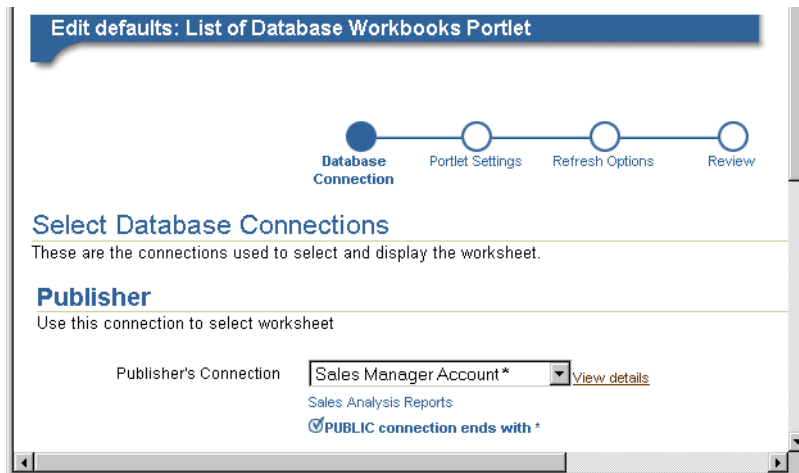
## Add Portlets To Region

Drill down to the appropriate provider, then click the portlet name to add the portlet to this region.



The two Discoverer portlet types (Worksheet and List of Database Workbooks) are displayed.

7. Click **List of Database Workbooks** to add the portlet to the **Selected Portlets** list.
8. Click OK to close the "Add Portlets to Region" page.  
Having added a portlet, you now edit the portlet to suit your needs.
9. Click **Edit Defaults** next to the portlet that you have just created to start the portlet wizard.



10. Use the Database Connections page to specify how portal users may access the portlet.
11. Use the Portlet Settings page to specify the portlet name, the order of workbooks, and the maximum number of workbooks to display. For example, you might want to display a maximum of ten workbooks in alphabetical order.
12. Use the Refresh Options page to specify when the workbook list is refreshed.
13. Use the Review page to check that you have selected the correct portlet options.
14. Click Finish to save the defaults.

You can now view the Discoverer worksheet in the portlet. It may take a few moments for the portlet to retrieve its content for the first time.

## How to add a worksheet portlet

You add a Worksheet portlet when you want to add Discoverer worksheet data to a page in Oracle9iAS Portal. For example, to publish a sales report to everyone in a sales department.

For more information, see:

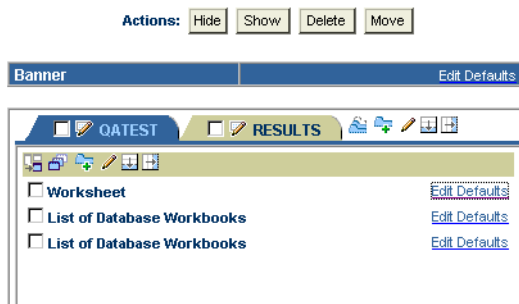
["About the Worksheet portlet"](#)

To add a Worksheet portlet:

1. Display the portal page to which you want to add a Discoverer portlet.
2. Click **Edit Page** to display the "Modify the Contents of the Page" page.

### Modify the Contents of the Page

Add portlets to a region, or remove or edit existing portlets. You can also add, delete, or edit regions and tabs, and edit the page banner.



3. Click the Add Portlets icon to display the "Add Portlets to Region" page.

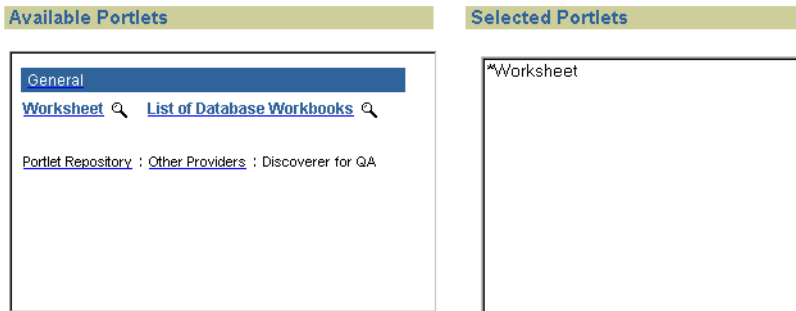
To add portlets, you move portlets from the **Available Portlets** list to the **Selected Portlets** list.

4. In the **Available Portlets** area, choose **Discoverer** or navigate to where the Discoverer portlets are located.

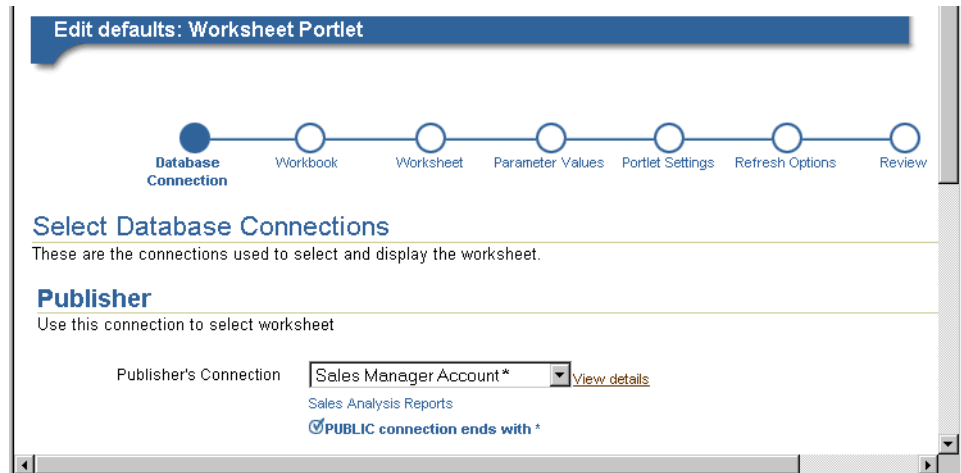
The two Discoverer portlet types (Worksheet and List of Database Workbooks) are displayed.

### Add Portlets To Region

Drill down to the appropriate provider, then click the portlet name to add the portlet to this region.



5. Click **Worksheet** to add a portlet to the **Selected Portlets** list.
6. Click OK to close the Add Portlets to Region page.  
Having added a portlet, you now edit the portlet to suit your needs.
7. Click **Edit Defaults** next to the portlet that you have just created to start the portlet wizard.



8. Use the "Database Connections page" to specify how portal users may access the portlet.
9. Use the "Select Workbook page" to specify the workbook in which the worksheet is stored.
10. Use the "Select Worksheet page" to specify which worksheet you want to publish to the portal.
11. (optional) If parameters are defined for the worksheet, use the "Edit Parameters page" to specify parameter values. Parameter values are used to provide dynamic input to worksheets. For example, to focus on specific information, or provide input to calculations.
12. Use the "Portlet Settings page" to specify what parts of the worksheet to publish. For example, you might want to publish the worksheet data only, the worksheet's graph only, or worksheet data and a worksheet's graph.
13. Use the "Refresh Options page" to specify when the worksheet data is refreshed.
14. Use the "Review page" to check that you have selected the correct portlet options.
15. Click Finish to save the defaults.

You can now view the Discoverer worksheet in the portlet. It may take a few moments for the portlet to retrieve its content for the first time.

## How to edit a portlet

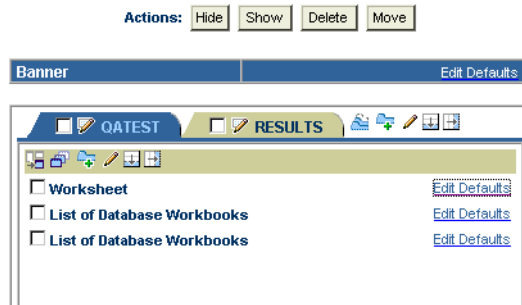
You edit portlet when you want to change how a portlet is displayed to portal users.

To edit a portlet:

1. Display the Portlet Provider page that contains the portlet you want to edit.
2. Click **Edit Page** to display the Modify the Contents of the Page page.

### Modify the Contents of the Page

Add portlets to a region, or remove or edit existing portlets. You can also add, delete, or edit regions and tabs, and edit the page banner.



3. Click **Edit Defaults** next to the portlet that you want to edit to start the portlet wizard for that style of portlet (List of Database Workbooks or Worksheet).
4. Follow the steps in the portlet wizard.
5. Click Finish to save changes to the portlet.

You can now view the updated Discoverer worksheet in the portlet.

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## EUL status workbooks

### EUL status workbooks

This chapter explains how to use Discoverer Administrator's EUL status workbooks and contains the following topics:

- "What are EUL status workbooks?"
- "About the Discoverer EUL V5 business area"
- "How to install the standard EUL status workbooks"
- "How to install Oracle Applications EUL status workbooks"
- "How to run Oracle Applications EUL status workbooks"
- "How to uninstall the Discoverer EUL V5 business area"
- "About the EUL Data Definition workbook"
- "About the Query Statistics workbook"
- "Notes on EUL status workbooks and the table DBA\_JOBS\_RUNNING"

### What are EUL status workbooks?

EUL status workbooks are Discoverer workbooks that provide useful reports for managing and documenting Discoverer End User Layers (EULs). The EUL status workbooks query information from folders in the Discoverer EUL V5 business area. You can analyze EUL status workbooks in Discoverer Plus or Discoverer Viewer.

You can give any Discoverer user access to the EUL status workbooks. However, the EUL status workbooks are intended primarily for administrative purposes.

The following EUL status workbooks are supplied with Discoverer:

- EUL Data Definition - this workbook contains information about data in the EUL
- Query Statistics - this workbook contains query statistics collected by Discoverer

Instructions explaining how to use each workbook are contained within individual worksheets.

Although the EUL status workbooks are supplied with Discoverer, they are not installed by default. How to install the workbooks depends on the type of EUL as follows:

- if you are running Discoverer against a standard EUL, follow the instructions in "[How to install the standard EUL status workbooks](#)"
- if you are running Discoverer against an Oracle Applications EUL, follow the instructions in "[How to install Oracle Applications EUL status workbooks](#)"

The EUL status workbooks are installed into the <ORACLE\_HOME>\discv902 directory.

Having installed the EUL status workbooks, you can:

- edit the Discoverer EUL V5 business area
- edit the supplied EUL status workbooks
- create your own EUL status workbooks

Note that you can only run the EUL status workbooks against Oracle databases.

## About the Discoverer EUL V5 business area

You can edit the workbooks or the Discoverer EUL V5 business area to suit your requirements. You can also create your own EUL status workbooks.

The Discoverer EUL V5 business area is similar to any other business area in the EUL. The folders within Discoverer EUL V5 business area include:

---

Folder	Description
BA & Folders	Business areas and folders defined in the EUL
Folders & Items	Folders and items defined in the EUL
Joins	The structures of joins defined in the EUL
Hierarchies	The structure of hierarchies



Folder	Description
Item Classes	The structure of Item Classes or LOVs
Summary Mappings	Mapping of summary tables to folders
Security	Users access to business areas
Privileges	Users Discoverer privileges
Workbook Management	List of workbooks saved to the database and who can access them

You can use the folders in the Discoverer EUL V5 business area to build your own workbooks to analyze and document the structure of your Discoverer business areas.

Note that certain folders in the Discoverer EUL V5 require the EUL owner to have SELECT access to the DBA\_JOBS\_RUNNING database table. For more information, see ["Notes on EUL status workbooks and the table DBA\\_JOBS\\_RUNNING"](#).

If you want to modify the supplied EUL status workbooks, we recommend you save a copy with a different name and modify the copy. Otherwise, any changes you make could be lost because the supplied EUL status workbooks are replaced with each new version of Discoverer.

## How to install the standard EUL status workbooks

Follow these steps if you are running Discoverer against a standard EUL.

**Note:** You must have an EUL installed (for more information, see [Chapter 3, "Creating and maintaining End User Layers"](#)).

To install the standard EUL status workbooks:

1. Start SQL\*Plus (if it is not already running) and connect as the EUL owner.  
For example, if SQL\*Plus is already running, you might type the following at the command prompt:  

```
SQL> connect jchan/tiger
```

  
Where jchan is the EUL owner and tiger is the EUL owner password.
2. Run the SQL file EUL5.sql  
For example you might type the following at the command prompt:

```
SQL> start d:\<ORACLE_HOME>\discv902\sql\EUL5.sql
```

Where <ORACLE\_HOME> is where Discoverer Administrator is installed.

The EUL5.sql file creates some custom PL/SQL functions required by the Discoverer EUL V5 business area.

3. Exit the SQL\*Plus session.
4. Start Discoverer Administrator.
5. Import the file EUL5.eex as follows:
  - a. Choose File | Import to display the "Import Wizard: Step 1 dialog"
  - b. Click Add to display the Open dialog
  - c. Select the file d:\<ORACLE\_HOME>\discv902\EUL5.eex, where d:\<ORACLE\_HOME> is where Discoverer Administrator is installed.
  - d. Click Open to return to the "Import Wizard: Step 1 dialog".

The selected SQL file EUL5.eex appears in the Import file list.
  - e. Click Next to display the "Import Wizard: Step 2 dialog".

The default settings are acceptable.
  - f. Click Next to display the "Import Wizard: Step 3 dialog".

This dialog enables you to start the import and monitor its status as each EUL object is processed.
  - g. Click Start to begin importing the EUL status workbooks.

When the import is complete, the 'Import Successful' message is displayed.
  - h. Click Finish to close the "Import Wizard: Step 3 dialog".

Having imported the EUL status workbooks you can now open them using Discoverer Plus or Discoverer Viewer.

## Notes

If you have upgraded from Discoverer Release 4, the EUL might contain a business area called EUL for Discoverer V4. This business area is no longer required, so delete it. Having deleted the EUL for Discoverer V4 business area remove the associated PL/SQL functions:

```
EUL4_GET_ANALYZED  
EUL4_GET_COMPLEX_FOLDER
```

EUL4\_GET\_HEIRLVL  
EUL4\_GET\_HIERORD  
EUL4\_GET\_ITEM  
EUL4\_GET\_ITEM\_NAME  
EUL4\_GET\_OBJECT  
EUL4\_GET\_OBJECT\_NAME  
EUL4\_GET\_SIMPLE\_FOLDER

**Hint:** For more information about how to remove PL/SQL functions, see the appropriate steps contained in "[How to uninstall the Discoverer EUL V5 business area](#)").

## How to install Oracle Applications EUL status workbooks

Follow these steps if you are running Discoverer against an Oracle Applications EUL.

**Note:** You must have an Oracle Applications EUL installed (for more information, see [Chapter 17, "Using Discoverer with Oracle Applications"](#)).

To install the Oracle Applications EUL status workbooks:

1. Start SQL\*Plus (if it is not already running) and connect as the EUL owner.

For example, if SQL\*Plus is already running, you might type the following at the command prompt:

```
SQL> connect jchan/tiger
```

Where jchan is the EUL owner and tiger is the EUL owner password.

2. Run the SQL file EUL5\_APPS.sql

For example you might type the following at the command prompt:

```
SQL> start d:\<ORACLE_HOME>\discv902\sql\EUL5_APPS.sql
```

Where <ORACLE\_HOME> is where Discoverer Administrator is installed.

The EUL5\_APPS.sql file creates some custom PL/SQL functions required by the Discoverer V5 EUL business area.

You are prompted for the username of the Oracle Applications FNDNAM schema.

3. Enter the username of the FNDNAM schema.

**Note:** Only enter the FNDNAM schema's username. Do not enter a password

You are prompted to check the username you entered.

4. Make sure the username you entered is correct.

If the name is not correct, re-run the script.

5. Start Discoverer Administrator.

6. Import the file EUL5\_APPS.eex as follows:

- a. Choose File | Import to display the "Import Wizard: Step 1 dialog"

- b. Click Add to display the Open dialog

- c. Select the file d:\<ORACLE\_HOME>\discv902\EUL5\_APPS.eex, where d:\<ORACLE\_HOME> is where Discoverer Administrator is installed.

- d. Click Open to return to the "Import Wizard: Step 1 dialog".

The selected SQL file EUL5\_APPS.eex appears in the Import file list.

- e. Click Next to display the "Import Wizard: Step 2 dialog".

The default settings are acceptable.

- f. Click Next to display the "Import Wizard: Step 3 dialog".

This dialog enables you to start the import and monitor its status as each EUL object is processed.

- g. Click Start to begin importing the EUL status workbooks.

When the import is complete, the 'Import Successful' message is displayed.

- h. Click Finish to close the "Import Wizard: Step 3 dialog".

Having imported the EUL status workbooks you can now open them using Discoverer Plus or Discoverer Viewer.

## How to run Oracle Applications EUL status workbooks

To run the EUL status workbooks with an Oracle Applications EUL in Discoverer Plus, you must connect as an Oracle Applications User or Responsibility. You cannot run the EUL status workbooks as the EUL owner.

To run Oracle Applications EUL status workbooks:

1. Start Discoverer Administrator as the EUL owner
2. Grant access to the EUL5 business area to either an Oracle Applications User or an Oracle Applications Responsibility.

For more information about granting access to business areas, see [Chapter 7, "Controlling access to information"](#).

3. Start Discoverer Plus or Discoverer Viewer as the User or Responsibility to which you granted access.

### Notes

The EUL status workbooks are shared with the PUBLIC user and are owned by the EUL owner. In other words, all users who can access the Discoverer EUL V5 business area can successfully run both the EUL Data Definition and Query Statistics workbooks.

## How to uninstall the Discoverer EUL V5 business area

To uninstall the Discoverer EUL V5 business area:

1. Connect to Discoverer Plus as the EUL Owner and delete the following workbooks:
  - EUL Data Definition
  - Query Statistics
2. Start Discoverer Administrator as the owner of the EUL containing the Discoverer EUL V5 business area
3. Open the Discoverer EUL V5 business area.
4. Highlight the Discoverer EUL V5 Business Area in the workarea.
5. Choose Edit | Delete to display the Confirm Business Area Delete dialog.
6. Select **Delete this Business Area and its Folders**.
7. Click Yes to delete the Discoverer EUL V5 business area and its folders.

You can now remove the PL/SQL functions associated with the Discoverer EUL V5 business area.

8. Choose Tools | Register PL/SQL Functions to display the PL/SQL Functions dialog.
9. Highlight the following functions:

```
EUL5_GET_ANALYZED  
EUL5_GET_APPS_USERRESP  
EUL5_GET_COMPLEX_FOLDER
```

EUL5\_GET\_HEIRLVL  
EUL5\_GET\_HIERORD  
EUL5\_GET\_ISITAPPS\_EUL  
EUL5\_GET\_ITEM  
EUL5\_GET\_ITEM\_NAME  
EUL5\_GET\_OBJECT  
EUL5\_GET\_OBJECT\_NAME  
EUL5\_GET\_SIMPLE\_FOLDER

10. Click Delete for each of the functions to delete the Custom PL/SQL Functions associated with the Discoverer EUL V5 business area.

You have now successfully removed the EUL status workbooks.

## About the EUL Data Definition workbook

The EUL Data Definition workbook provides reports on the objects contained in the EUL. You would use the EUL Data Definition workbook to learn more about how EUL objects are configured. The workbook consists of the following worksheets:

<b>Worksheet</b>	<b>Description</b>
EUL Version	The version of the Discoverer EUL you are currently using.
Business Areas and Folders	The folders in each business area
Folders and Items	The items in each folder in each business area
Joins	The joins defined in each business area.
Conditions	The conditions defined in each business area.
Hierarchies	The hierarchies defined in each business area.
Item Classes - LOVs	The List of Values defined in each business area.
Security	Access to business areas, by Users/Roles/Responsibilities.
Privileges	Access privileges, by Users/Roles/Responsibilities.
Summary Mappings	Mapping of folders to summaries, by business area.
Workbook Management	List of workbooks saved to the database and who can access them.

## About the Query Statistics workbook

The Query Statistics workbook displays statistical information about the queries that end users have run. You would use the Query Statistics workbook to learn more about the nature of end user queries. The workbook consists of the following worksheets:

Worksheet	Description
Query Statistics	The version of the Discoverer EUL to which you are currently connected.
Workbooks Queried by User	Workbooks queried by user.
Workbook Query Statistics	Query statistics about each workbook.
Workbooks that have used summaries.	Which workbooks have used summaries.
Ad-hoc Queries by User	Shows the User and the Folders and Items queried but not saved to the database.
Ad-hoc Queries by Workbook	Shows the workbooks queried but not saved to the database.
Ad-hoc Queries that used a Summary	Shows the queries not saved to the database that used a summary.

## Notes on EUL status workbooks and the table DBA\_JOBS\_RUNNING

Certain folders (specifically the EUL5\_DBA\_JOBS\_RUNNING folder) in the Discoverer EUL V5 business area require the EUL owner to have SELECT access to the DBA\_JOBS\_RUNNING database table. Without SELECT access to this table, the ORA-01031 message regarding insufficient privileges is displayed.

To grant SELECT access to DBA\_JOBS\_RUNNING:

1. Start SQL\*Plus (if it is not already running) and connect as a user with DBA privilege.

For example, if SQL\*Plus is already running, you might type the following at the command prompt:

```
SQL> connect dba_user/dba_password
```

2. Grant **SELECT** access to **DBA\_JOBS\_RUNNING** to the EUL owner by typing the following at the command prompt:

```
SQL> grant select on dba_jobs_running to <EUL owner>;  
SQL> commit;
```

To confirm that the EUL owner has select access to the **DBA\_JOBS\_RUNNING** database table:

1. Start **SQL\*Plus** (if it is not already running) and connect as the EUL owner.

For example, if **SQL\*Plus** is already running, you might type the following at the command prompt:

```
SQL> connect jchan/tiger
```

Where **jchan** is the EUL owner and **tiger** is the EUL owner password.

2. Describe the **DBA\_JOBS\_RUNNING** database table by typing the following at the command prompt:

```
SQL> desc DBA_JOBS_RUNNING
```

If the EUL owner has select access to **DBA\_JOBS\_RUNNING**, a list of columns in the table is displayed. Otherwise, a message indicating the object does not exist is displayed.



---

---

## Predicting query performance

### Predicting query performance

This chapter explains how to use query prediction in Discoverer Administrator and contains the following topics:

- "About predicting query performance"
- "How does query prediction work in Discoverer Plus?"
- "Why might query prediction not be available?"
- "About improving the speed and accuracy of query prediction"
- "How to make the necessary database views available for query prediction"
- "How to verify and change the `timed_statistics` parameter for query prediction"
- "How to analyze data tables"
- "How to verify and change the `optimizer_mode` parameter for query prediction"
- "How to reduce long query prediction times"
- "How to use query prediction with secure views"
- "How to delete old query prediction statistics"

### About predicting query performance

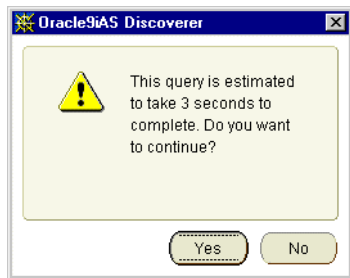
Discoverer includes functionality to predict the time required to retrieve the information in a Discoverer query. The query prediction appears before the query begins, enabling Discoverer users to decide whether or not to run the query. This is

a powerful facility that enables Discoverer users to control how long they wait for large reports.

Query Prediction uses the Cost-Based Optimizer (CBO) in the Oracle RDBMS. Therefore query prediction is not available when running against other databases.

## How does query prediction work in Discoverer Plus?

Discoverer end users can specify that they be informed when a query is predicted to take longer than a defined time. A dialog displays the query prediction details and the option to cancel the query.



If the user chooses to cancel the query they can schedule the workbook for Discoverer to run the query later, for example, overnight so that the user can open the worksheet the next morning (for more information about scheduling workbooks in Discoverer Plus, see the *Oracle 9iAS Discoverer Plus User's Guide*). For more information about enabling end users to schedule workbooks using Discoverer Administrator, see [Chapter 8, "Scheduling workbooks"](#).

## Why might query prediction not be available?

Discoverer end users might find that query prediction is not available when running a worksheet. To see possible reasons (in Discoverer Administrator), choose Help | Database Information to display the "[Database Information dialog](#)". Query prediction might not be available for any of the following reasons:

**Table 20–1** *Reasons query prediction might not be available, and solutions*

Reason	Solution
Connection to a database that does not support query prediction (e.g. Oracle 7.1.x)	Upgrade the database.

Reason	Solution
Views required for query prediction are not available.	Refer to " <a href="#">How to make the necessary database views available for query prediction</a> "
The timed-statistics parameter in init<sid>.ora is set to FALSE (the default value).	Refer to " <a href="#">How to verify and change the timed_statistics parameter for query prediction</a> "
Data tables have not been analyzed.	Refer to " <a href="#">How to analyze data tables</a> "
The optimizer mode parameter in init<sid>.ora is set to RULE instead of CHOOSE	Refer to " <a href="#">How to verify and change the optimizer_mode parameter for query prediction</a> "

## About improving the speed and accuracy of query prediction

When users have confidence in the speed and accuracy of query prediction, they will be more likely to schedule long-running queries to run later. With accurate query prediction, the load placed on the server is typically reduced and query performance is improved for all users.

To implement query prediction effectively:

- Analyze the tables that users will query using the ANALYZE TABLE command. Use the Business Areas and Folders worksheet of the EUL Data Definition workbook to display when the folders in the EUL were analyzed. For information about how to analyze data tables, see "[How to analyze data tables](#)".
- Grant your users access to the system view V\$SQL (for more information, see "[How to use query prediction with secure views](#)")

## How to make the necessary database views available for query prediction

Various database views must have the SELECT privilege granted to the public user before query prediction is enabled in Discoverer. For more information, see the Oracle9i documentation.

To make the necessary views available for query prediction, for Oracle9i databases:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> CONNECT username/password@database AS SYSDBA;
```

The username must have sufficient privileges to complete the following grants.

3. Grant `SELECT` access on the views necessary for query prediction by typing the following at the command prompt:

```
SQL> grant select on v_$session to public;
SQL> grant select on v_$sesstat to public;
SQL> grant select on v_$parameter to public;
```

**Note:** To grant `SELECT ON V_$PARAMETER` you must be logged in as the `SYS` user. If you are unsure about the `SYS` user name and password, see your database administrator.

To make the necessary views available for query prediction, for Oracle databases earlier than Oracle9i:

1. From NT choose Start | Run.
2. Type in one of the following:
  - `SVRMGRL` (for Oracle 8.0)
  - `SVRMGR` (for Oracle8i Personal Edition)
3. When in the DBA facility, type `connect internal`
4. Grant `SELECT` access on the views necessary for query prediction by typing the following at the command prompt:

```
SQLDBA> grant select on v_$session to public;
SQLDBA> grant select on v_$sesstat to public;
SQLDBA> grant select on v_$parameter to public;
```

**Note:** To grant `SELECT ON V_$PARAMETER` you must be logged in as the `SYS` user. If you are unsure about the `SYS` user name and password, see your database administrator.

## How to verify and change the `timed_statistics` parameter for query prediction

The `timed_statistics` parameter found in the database view `v_$parameter` must be set to `TRUE` to enable query prediction in Discoverer.

To verify that `timed_statistics` is set to `TRUE`:

1. Start `SQL*Plus` (if it is not already running) and connect as the `DBA` user.

For example, if SQL\*Plus is already running, you might type the following at the command prompt:

```
SQL> connect dba_user/dba_password@database
```

Where `dba_user` is the username and `dba_password` is the password of the DBA user and `database` is the name of the database that holds the data to be queried.

2. Type the following query:

```
SQL> select value from v$sqlparameter where name = 'timed_statistics';
```

If the query returns the value `TRUE`, `timed_statistics` is set correctly for query prediction. If the query returns the value `FALSE`, query prediction will not be available unless you change the value of the `timed_statistics` parameter in the `init<sid>.ora` file.

To edit the `init<sid>.ora` file:

1. Locate the `INIT<SID>.ORA` file.

The `INIT<SID>.ORA` file is held in `<ORACLE_HOME>\database`. The default name of the file is `INITORCL.ORA`, where `ORCL` is the `<SID>` name.

2. Edit the file to include the following line:

```
timed_statistics = TRUE
```

3. For the change to take effect, shut down and restart the database.

## How to analyze data tables

Discoverer uses the results of data table analysis for query prediction. Data table analysis generates information about the database tables (e.g. the size of a table). For more information, see the Oracle9i database documentation.

To analyze data tables:

1. Start SQL\*Plus (if it is not already running) and connect as the owner of the data tables you want to analyze.

For example, if SQL\*Plus is already running, you might type the following at the command prompt:

```
SQL> connect tabowner/tabpass@database
```

Where tabowner is the username, tabpass is the password of the data table owner and database is the name of the database that holds the data to be queried.

2. Type the following query:

- For Oracle 8.0 (and later) databases:

```
SQL> analyze table <tabowner.tablename> compute statistics for all
columns;
```

### Notes

If you expect the table contents to change significantly over time, analyze the data tables at regular intervals.

If your end users find that query prediction itself takes a long time (i.e. > 10 seconds) this suggests that the tables have not been analyzed. For example, if it takes 25 seconds or so for Discoverer to display the query prediction but the query runs in less than 2 seconds.

## How to verify and change the optimizer\_mode parameter for query prediction

To verify that the optimizer\_mode parameter is set to CHOOSE:

1. Start SQL\*Plus (if it is not already running) and connect as the DBA user.

For example, if SQL\*Plus is already running, you might type the following at the command prompt:

```
SQL> connect dba_user/dba_password@database
```

Where dba\_user is the username and /dba\_password is the password of the DBA user and database is the name of the database that holds the data to be queried.

2. Type the following query at the command prompt:

```
SQL> select value from v$parameter where name = 'optimizer_mode';
```

If the query returns the value `CHOOSE`, `optimizer_mode` is set correctly for query prediction. The system will use the Cost Based Optimizer if the tables have been analyzed, and the Rule Based Optimizer if the tables have not.

If the query returns the values `FIRSTROWS` or `ALLROWS`, `optimizer_mode` is also set correctly for query prediction

Both `FIRSTROWS` and `ALLROWS` force the use of the Cost Based Optimizer, even if the tables have not been analyzed.

If the query returns the value `RULE`, query prediction will not be available unless you change the value of the `optimizer_mode` parameter in the `init<sid>.ora` file.

To edit the `init<sid>.ora` file:

1. Locate `INIT<SID>.ORA`.

The `INIT<SID>.ORA` file is held in `<ORACLE_HOME>\database`. The default name of the file is `INITORCL.ORA`, where `ORCL` is the `<SID>` name.

2. Edit the file to include the following line:

```
optimizer_mode = CHOOSE
```

3. For the change to take effect, shut down and restart the database.

## How to reduce long query prediction times

Discoverer uses the Cost-Based Optimizer within the query prediction process. Note that the Cost-Based Optimizer only parses the query statements, and that query execution is usually governed by the server's default optimizer mode.

In a large schema environment (e.g. Oracle Applications), the database can take a long time to parse a statement using the Cost-Based Optimizer. The query prediction process might therefore take several minutes to complete.

If users are having to wait a long time before the query prediction process is complete, consider the following three solutions:

- You could turn off query prediction using the appropriate Discoverer registry setting, as follows:
  - For Discoverer Desktop

In the Windows registry, set the `DWORD` value of the `HKEY_CURRENT_USER\Software\Oracle\Discoverer 902\Database\QPPEnable` registry key to `0` (zero).

If you subsequently decide to re-enable query prediction, either remove the registry key or set it to 1.

For more information about Discoverer registry settings stored in the Windows registry, see [Chapter 22, "About Discoverer Administrator and Discoverer Desktop registry settings"](#).

- For Discoverer Plus and Discoverer Viewer

Change the value of the QPPEnable registry setting in the reg\_key.dc Discoverer registry file. If QPPEnable is set to 01 00 00 00, query prediction is turned on. To turn query prediction off, set QPPEnable to 00 00 00 00.

For more information about Discoverer registry settings stored in the reg\_key.dc file, see [Chapter 22, "About Discoverer Plus and Discoverer Viewer registry settings"](#).

- You could make sure that query prediction does not enforce the use of the Cost-Based Optimizer using the appropriate Discoverer registry setting, as follows:

- For Discoverer Desktop

In the Windows registry, set the DWORD value of the HKEY\_CURRENT\_USER\Software\Oracle\Discoverer 902\Database\QPPCBOEnforced registry key to 0 (zero).

When this registry key is set to zero, use of the Cost-based Optimizer (CBO) is not enforced and will follow the normal rules of the database server.

If you subsequently decide that you want query prediction to force the use of the Cost-Based Optimizer, either remove the registry key or set it to 1.

For more information about Discoverer registry settings stored in the Windows registry, see [Chapter 22, "About Discoverer Administrator and Discoverer Desktop registry settings"](#).

- For Discoverer Plus and Discoverer Viewer

Change the value of the QPPCBOEnforced registry setting in the reg\_key.dc Discoverer registry file. If QPPCBOEnforced is set to 01 00 00 00, query prediction will enforce the use of the cost-based optimizer. To specify that query prediction is to use the default optimizer, set QPPCBOEnforced to 00 00 00 00.

For more information about Discoverer registry settings stored in the reg\_key.dc file, see [Chapter 22, "About Discoverer Plus and Discoverer Viewer registry settings"](#).



- You could tune the way the Cost-Based Optimizer uses indexes. For example, you could adjust the following database parameters:
  - `optimizer_index_cost_adj`
  - `optimizer_index_caching`

For more information about database parameters, see the Oracle9i documentation.

## How to use query prediction with secure views

Discoverer's query prediction feature uses the EXPLAIN PLAN statement to analyze queries. However, EXPLAIN PLAN cannot analyze queries against secure views, with the result that query prediction is not normally able to work in these environments. To work around this limitation, grant your users access to the system view V\$SQL.

To grant your users access to the system view V\$SQL, for Oracle9i databases:

1. Log on to SQL\*Plus as the database administrator.
2. Execute the following SQL statement at the command prompt:

```
SQL> CONNECT username/password@database AS SYSDBA;
```

3. Grant SELECT access on the views necessary for query prediction by typing the following at the command prompt:

```
SQL> grant select on v_$sql to public;
```

To grant your users access to the system view V\$SQL, for Oracle databases earlier than Oracle9i:

1. From NT choose Start | Run.
2. Type in one of the following:
  - SVRMGRL (for Oracle 8.0)
  - SVRMGR (for Oracle8i Personal Edition)
3. When in the DBA facility, type `connect internal`
4. Grant SELECT access on the views necessary for query prediction by typing the following at the command prompt:

```
SQLDBA> grant select on v_$sql to public;
```

### Notes

You can also grant your users access to the system view V\$SQL by running the following script in SQL\*Plus:

```
<ORACLE_HOME>\discv902\sql\eulsuqpp.sql
```

You must know the SYSTEM password to use this script.

## How to delete old query prediction statistics

Query prediction statistics can become obsolete for many reasons. You can delete all query prediction statistics that were created before a specified date.

To delete old query prediction statistics from the database:

1. Start SQL\*Plus (if it is not already running) and connect as the EUL owner.

For example, if SQL\*Plus is already running, you might type the following at the command prompt:

```
SQL> connect jchan/tiger
```

Where jchan is the EUL owner's username and tiger is the EUL owner's password.

2. Run the SQL file EULstdel.sql

For example you might type the following at the command prompt:

```
SQL> start d:\<ORACLE_HOME>\discv902\sql\EULstdel.sql
```

Where <ORACLE\_HOME> is where Discoverer Administrator is installed.

A summary of the query statistics stored in the database is displayed. You are given the option to delete query statistics older than a specified number of days.

3. (optional) Enter the number of days after which query statistics will be deleted (or leave it blank if you do not want to delete any statistics).

If you do not specify a number of days, no query statistics are deleted.

---

---

## Discoverer command line interface

### Discoverer command line interface

This chapter explains how to use the Discoverer command line interface and contains the following topics:

- "What is the Discoverer command line interface?"
- "What is a command?"
- "What is a command modifier?"
- "About using the Discoverer command line interface"
- "What privileges are required to run the command line interface?"
- "Notes on using commands"
- "What command syntax conventions does this guide use?"
- "What is the syntax for commands?"
- "Examples of commands"
- "What is a command file?"
- "How to create a command file"
- "How to run a command file"
- "Examples of command files"
- "Quick guide to Discoverer Administrator commands"
- "Discoverer Administrator command reference"
- "Discoverer Administrator command modifier reference"
- "Discoverer Desktop command reference"

## What is the Discoverer command line interface?

The Discoverer command line interface is a set of text based commands that enable you to perform tasks without running the Discoverer graphical user interface (GUI). For example, using the command line interface you can:

- import EUL objects
- export EUL objects
- refresh EUL objects

In addition, you can create command files that contain multiple commands (much like MS-DOS batch files or Unix script files) to perform groups of administrative tasks automatically.

## What is a command?

In the Discoverer command line interface, a command is an instruction that performs a particular task in Discoverer Administrator or Discoverer Desktop. For example:

- the command `/CONNECT` bypasses the ["Connect dialog"](#) and connects using the user ID, password, and database name specified, for example:

```
dis5adm.exe /connect myname/mypassword@database
```

- the command `/IMPORT` imports EUL objects in the current EUL, for example:

```
dis5adm.exe /connect myname/mypassword@database /import  
c:\data\sales.eex
```

**Note:** Commands are not case-sensitive (for more information, see also ["Notes on using commands"](#)).

## What is a command modifier?

A command modifier is an instruction that qualifies or refines a command. For example:

- the command modifier `/LOG` creates a log file to store processing information during the execution of a command

```
dis5adm.exe /connect myname/mypassword@database /import  
c:\data\sales.eex /log sales_import_logfile
```

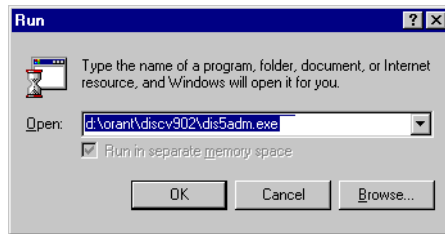
- The command modifier `/ITEM` used in conjunction with the command `/DELETE` specifies which EUL item to remove from an EUL

```
dis5adm.exe /connect myname/mypassword@database /delete  
/item sales.profit
```

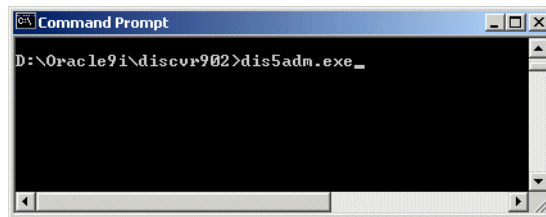
## About using the Discoverer command line interface

You can run Discoverer commands in the following ways:

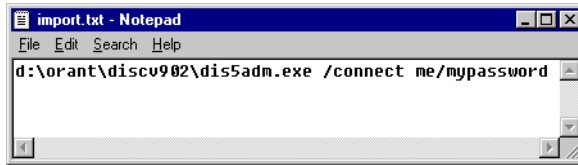
- you can enter a command directly at the Windows Run dialog (which you display by selecting Run from the Windows Start menu).



- You can open an MS-DOS window, and enter a command directly at the command prompt. For example, to display all the available commands available in Discoverer Administrator.



- You can store a series of commands in a text file (known as a command file) and run the text file as a single argument to the Discoverer executable file. For example, to run commands stored in the text file `Import.txt` (see the example command file in Notepad below).



To run the above command file, you might type the following in the command line:

```
Dis5adm.exe /cmdfile import.txt
```

## What privileges are required to run the command line interface?

To use the command line interface, you require the same Discoverer privileges as you do to use the Discoverer graphical user interface.

If you want to perform an operation on an EUL using the command line interface, you must have the correct privileges. If you do not have the correct privileges, the operation will fail.

When using the command line interface, you can explicitly specify an EUL using the modifier `/eul` (for more information, see `"/eul"`) or if you do not specify an EUL, Discoverer will identify the default EUL for the database user.

## Notes on using commands

When using the command line interface, the following rules apply:

- You can display all the commands available in Discoverer Administrator by entering the command `Dis5adm.exe /?` in the Windows Run dialog.
- Commands are not case-sensitive - you can use either upper-case or lower-case characters interchangeably.
- Commands can appear in any order as long as their arguments immediately follow them in the order defined.
- Command modifiers can appear in any order as long as their arguments immediately follow them in the order defined.
- If you do not specify an object name where one is required (e.g an EUL or business area) Discoverer defaults to the Discoverer manager-owned object.
- When specifying Discoverer EUL objects, you can use either a Display Name or an Identifier. For example, if a Discoverer folder has the display name Sales,

and the Identifier SALES\_132388, you can specify this folder as an argument to the `/refresh_folder` command in two ways:

- `/refresh_folder Sales`
- `/refresh_folder SALES_132388 /identifier`

For more information on Identifiers, see [Chapter 3, "What are identifiers?"](#).

When specifying an object's Display Name or Identifier that contains a special character (e.g. a space), enclose the entire string in double quotation marks (" "). For example, enter the name of the folder object Sales Figures as `/folder "Sales Figures"`.

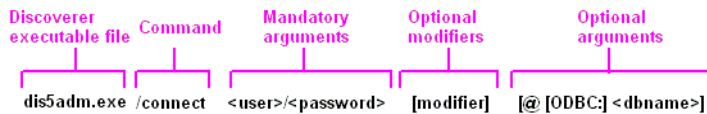
- The `/REFRESH_SUMMARY` command line option only works in conjunction with Oracle databases.
- When using commands, execute them one at a time. If you try to run more than one command at a time, you may cause errors.
- If you are connecting to a non-Oracle database, use the optional `[@[ODBC:]<dbname>]` argument.
- If you use the `/connect` command to bypass the "Connect dialog", arguments that begin with a slash must be enclosed in double-quotes. For example:  
`/connect "/@[ODBC:]<dbname>"`
- If you want to use the Discoverer Desktop command line interface to open a workbook from the database (using the `/opendb` command), the workbook name must not contain a period.

## What command syntax conventions does this guide use?

This guide uses the following command syntax conventions:

- Discoverer commands and modifiers are shown in plain type.
- Mandatory command arguments are enclosed in angle brackets `< >`.
- Optional command arguments are enclosed in square brackets `[ ]`.
- Where command arguments are separated by a pipe character (i.e. `|`), enter one from the list. For example, for the command `'/refresh | /rename'`, enter either `'/refresh'` or `'/rename'`.

**Figure 21–1 Command conventions used in this guide**



## What is the syntax for commands?

Use this syntax for the command line interface (typed in a single line with no line breaks or carriage returns):

```
dis5adm.exe  
[/connect <user>/<password>[@[ODBC:]<dbname>]]  
/<command> [/<argument(s)>]  
[/<modifier(s)> [/<argument(s)>]]
```

Where:

- dis5adm.exe - the name of the Discoverer executable file. The name depends on the version of Discoverer you are using, as follows:
  - Discoverer 3.1 - dis31adm.exe
  - Discoverer 4.1 - dis4adm.exe
  - Discoverer 9.0.2 - dis5adm.exe
- [/connect <userid>/<passwd>[@[ODBC:]<dbname>]] - this optional command argument enables you to bypass the "Connect dialog".
- /<command> [/<argument(s)>] - a valid Discoverer command name followed by any required arguments.
- [/<modifier(s)> [/<argument(s)>]] - one or more valid Discoverer modifiers followed by any required arguments.

## Examples of commands

### Example 1

To delete the Sales folder and Sum1 summary from the eul31 EUL you would use the following command:

```
dis5adm.exe /connect me/mypassword /delete /folder "Sales" /summary  
"Sum1" /eul eul31 /log del.log
```



**Example 2**

To refresh the Sales1 and Sales2 folders you would use the following command:

```
dis5adm.exe /connect me/mypassword /refresh_folder "Sales1, Sales2" /log  
refsum.log
```

**Example 3**

To create an Applications Mode EUL in the database and grant access to it you would use the following command:

```
dis5adm.exe /connect eul_owner:appsresp/appspwd /create_eul /apps_mode  
/apps_grant_details apps/apps
```

## What is a command file?

Command files are text files that contain one or more Discoverer commands that can be run automatically from the command line. Command files work in a similar way to MS-DOS batch files and UNIX script files.

The commands in a command file are treated as though they were entered directly on the command line. Carriage returns embedded in the text file are ignored.

A command file may in turn invoke other command files. This provides a convenient work around for the Microsoft Windows imposed limitation of restricting a command line to not more than 255 characters in length.

## How to create a command file

You can create a command file using a text editor. Type the command into the text editor and save the file using the extension .txt.

## How to run a command file

To run a command file, start the Discoverer Administrator executable (for example, dis5adm.exe) with the name of the command file as an argument to the /cmdfile command. For example, to run commands stored in the text file Import.txt, type:

```
dis5adm.exe /cmdfile Import.txt
```

You can also run more than one command file by repeating the /cmdfile command. For example, to run commands stored in the text file Login.txt, then commands in Import.txt, type:

```
dis5adm.exe /cmdfile Login.txt /cmdfile Import.txt
```

## Examples of command files

Command files are a convenient way to store modular commands, which can then be used in different combinations. For example, the following three command files contain the following commands:

- `connect.txt`  
contains the line `/connect me/mypassword@mydatabase`
- `create.txt`  
contains the line `/create eul /log create.log`
- `delete.txt`  
contains the line `/delete eul /log delete.log`

These three files can then be run from the command line in any of the following three combinations:

- `dis5adm.exe /cmdfile connect.txt`  
This would be a simple connect from the command line.
- `dis5adm.exe /cmdfile connect.cmd /cmdfile create.txt`  
This would connect and create an EUL for the connected user, storing all output into a log file named `create.log`.
- `dis5adm.exe /cmdfile connect.cmd /cmdfile delete.txt`  
This would connect and delete the EUL owned by the connected user, storing all output into a log file named `delete.log`.

## Quick guide to Discoverer Administrator commands

Use the table below to find a brief description of a command.

**Table 21–1** *Alphabetical summary of Discoverer commands*

Command	Description
"/?"	Display online help.
"/apps_fndnam" <foundation name>	Override connection details.
"/apps_user"	Connect as Oracle Applications user.
"/asm" <modifier(s)>	Automate summary management ASM
"/cmdfile"	Run command files
"/connect" <user-name>/<password> [@<database>]	Connect to an EUL.
"/create_eul"	Create an EUL.
"/create_eul /apps_mode"	Create an APPS EUL.
"/delete" <modifier(s)>	Delete EUL objects.
"/delete_bus_area" <business area>	Delete a business area.
"/delete_eul"	Delete an EUL.
"/export (EUL objects)" <export file> <modifier(s)>	Export EUL objects.
"/import (Business Area)" <business area>	Import a business area.
"/import (EUL objects)" <import file(s)> <modifier(s)>	Import EUL objects.
"/load" <business_area>	Load a business area.
"/refresh_bus_area" <bus area name(s)>	Refresh business areas.
"/refresh_folder" <folder name(s)>	Refresh folders.
"/refresh_summary" <summary name(s)> <bus area name>	Refresh summary folders.

Use the table below to find out which command to use for a particular task.

**Table 21–2 Common tasks and related commands**

<b>How to:</b>	<b>Use this command</b>
Automate summary management (ASM)	<code>"/asm" &lt;modifier(s)&gt;</code>
Connect as Oracle Apps user.	<code>"/apps_user"</code>
Connect to an EUL.	<code>"/connect" &lt;user-name&gt;/&lt;password&gt; [@&lt;database&gt;]</code>
Create an EUL.	<code>"/create_eul"</code>
Create an APPS EUL.	<code>"/create_eul /apps_mode"</code>
Delete a Business Area.	<code>"/delete_bus_area" &lt;business area&gt;</code>
Delete an EUL.	<code>"/delete_eul"</code>
Delete EUL objects.	<code>"/delete" &lt;modifier(s)&gt;</code>
Display on-line help.	<code>"/?"</code>
Export EUL objects.	<code>"/export (EUL objects)" &lt;export file&gt; &lt;modifier(s)&gt;</code>
Import a Business Area.	<code>"/import (Business Area)" &lt;business area&gt;</code>
Import EUL objects.	<code>"/import (EUL objects)" &lt;import file(s)&gt; &lt;modifier(s)&gt;</code>
Load a Business Area.	<code>"/load" &lt;business_area&gt;</code>
Override connection details.	<code>"/apps_fndnam" &lt;foundation name&gt;</code>
Refresh Business Areas.	<code>"/refresh_bus_area" &lt;bus area name(s)&gt;</code>
Refresh Folders.	<code>"/refresh_folder" &lt;folder name(s)&gt;</code>
Refresh Summaries.	<code>"/refresh_summary" &lt;summary name(s)&gt; &lt;bus area name&gt;</code>
Run command files	<code>"/cmdfile" &lt;command file name(s)&gt;</code>

## Discoverer Administrator command reference

This section contains detailed reference information about each command in the Discoverer Administrator command line interface. Note the following:

- commands are listed in alphabetical order
- commands can be refined by command modifiers (for more information, see "[Discoverer Administrator command modifier reference](#)")

### /?

This command displays a list of Discoverer commands and their syntax and arguments.

Information	Details
■ Syntax:	" /? "
■ Modifiers:	None
■ Notes:	None
■ Restrictions:	None
■ Example:	Dis5adm.exe /?

### /apps\_fndnam

This command overrides the values for both the fields GWYUID (including Gateway User ID password) and FNDNAM in the Connection tab of the Options dialog.

Information	Details
■ Syntax:	/apps_fndnam <foundation name>
■ Syntax:	/apps_gwyuid <gateway user id>/<password>
■ Example:	dis5adm.exe /connect appsuser:appsresp/appspwd /apps_fndnam apps /apps_gwyuid applsyspub/pub

## /apps\_user

This command enables you to connect to Discoverer as an Oracle Applications user.

Information	Details
■ Syntax:	<code>/apps_user</code>
■ Modifiers	<code>"/apps_responsibility"</code> <code>"/apps_security_group"</code>
■ Example	<code>dis5adm.exe /connect appsuser/appspwd /apps_user /apps_responsibility "UK_Purchasing" /apps_security_group "UK_Managers"</code> Or <code>dis5adm.exe /connect appsuser:UK_Purchasing/appspwd /apps_user /apps_security_group "UK_Managers"</code>

## /asm

This command enables you to execute Discoverer's Automated Summary Management facility (ASM).

Information	Details
■ Syntax:	<code>/asm [/asm_space &lt;bytes&gt;   /asm_space &lt;bytes&gt; /asm_tablespace &lt;tablespace name&gt;]</code>
■ Modifiers:	<code>"/asm_space, /asm_tablespace"</code>
■ Restrictions:	If you specify an <code>/asm_tablespace</code> argument, you must specify an <code>asm_space</code> argument.
■ Example:	<code>dis5adm.exe /connect me/mypassword /asm /asm_space 2182 /asm_tablespace user_data</code>

## /cmdfile

This command enables you to run Discoverer commands stored in a text file automatically.

Information	Details
■ Syntax:	<code>/cmdfile &lt;file name&gt;</code>

Information	Details
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>To create a command file, create a text file containing one or more Discoverer commands using a standard text editor. To run the command(s) in the text file, at the command line enter:</p> <pre>dis5adm.exe /cmdfile &lt;file name&gt;</pre> <p>For more information, see <a href="#">"What is a command file?"</a>.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To run command(s) stored in the text file myFile, type the following command at the command line:</p> <pre>dis5adm.exe /connect me/mypassword /cmdfile myFile</pre>

## /connect

This command enables you to connect to an EUL without having to enter a user name and password at the ["Connect dialog"](#).

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/connect &lt;userid&gt;/&lt;passwd&gt;[@[ODBC:]&lt;dbname&gt;]]</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<pre>"/eul" &lt;eul&gt; "/apps_user" "/apps_responsibility" &lt;responsibility&gt; /apps_gwuid &lt;gwuid&gt; "/apps_fndnam" &lt;fndnam&gt; "/apps_security_group" &lt;security_group&gt;</pre>
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>See also <a href="#">Chapter 17, "Using Discoverer with Oracle Applications"</a></p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<pre>dis5adm.exe /connect user/password@datatbase</pre>

## /create\_eul

This command enables you to create a Discoverer EUL.

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/create_eul</pre>

Information	Details
■ Modifiers:	<code>/apps_mode</code> <code>"/apps_grant_details"</code> <code>/default_tablespace</code> <code>"/eul_language" &lt;language&gt;</code> <code>"/log"</code> <code>"/overwrite"</code> <code>"/password"</code> <code>"/private"</code> <code>"/show_progress"</code> <code>/temporary_tablespace</code> <code>"/user"</code>
■ Notes:	<p>When using the <code>/create_eul</code> command, note the following:</p> <ul style="list-style-type: none"><li>■ Specify a user name and password for the owner of the new EUL. Not specifying a user name and password causes the ownership to default to your user ID.</li><li>■ Specify whether to overwrite any existing EUL owned by the intended owner of the new EUL.</li><li>■ Specify whether the new EUL should be public (default) or private.</li></ul> <p>For more information about the creation and deletion of End User Layers, see <a href="#">Chapter 3, "Creating and maintaining End User Layers"</a>.</p>
■ Example:	<p>To create a private EUL for a user named, "Bob", whose password is welcome, overwriting any existing EUL and recording all log entries in a file named create.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /create_eul /overwrite /user bob /password welcome /private /log create.log</pre>

---

## `/create_eul /apps_mode`

This command enables you to create an Oracle Applications Mode EUL using the Discoverer command line interface. This command starts Discoverer Administrator (in Oracle Applications mode), creates the Applications Mode EUL in the database,



and connects you to it. The example also includes the specification of schema/password.

Information	Details
■ Syntax:	<code>/create_eul /apps_mode</code>
■ Modifiers:	<code>"/apps_grant_details"</code>
■ Example	<code>dis5adm.exe /connect system/manager /create_eul /apps_mode /apps_grant_details apps/apps</code>

## /delete

This command enables you to remove EUL objects from the database. You can also remove an entire EUL using the `"/delete_eul"` command.

Information	Details
■ Syntax:	<code>/delete &lt;modifier(s)&gt; [/identifier]</code>
■ Modifiers:	<p>Modifiers for configuring the deletion:</p> <pre>"/log" &lt;log file name&gt; ["/log_only"] "/show_progress"</pre> <p>Modifiers for defining which EUL object(s) to delete:</p> <pre>/asm_policy &lt;asm policy&gt; "/business_area" &lt;business area&gt; "/ba_link" &lt;business area&gt; &lt;folder&gt; "/condition" &lt;folder&gt;.&lt;condition&gt; "/folder" &lt;folder&gt; "/function" &lt;PL/SQL function&gt; "/hierarchy" &lt; hierarchy&gt; "/hier_node" &lt;hierarchy&gt;.&lt;hierarchy_node&gt; "/identifier" "/item" &lt;folder&gt;.&lt;item&gt; "/item_class" &lt;item class&gt; "/join" &lt;join name&gt; "/parameter" &lt;folder&gt;.&lt;parameter&gt; "/summary" &lt;summary&gt; "/workbook" &lt;workbook&gt;</pre>
■ Notes:	You can delete one or more EUL objects at a time, (see examples below). Parameters (e.g. business areas, folders) must be named explicitly, wildcards are not allowed.

Information	Details
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To delete two Business Areas named Test BA and Final BA, residing in an EUL named eul31, and write to a log file named delba.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /delete /business_area "Test BA, Final BA" /eul eul31 /log delba.log</pre> <p>To delete a Folder named "Sales", and a Summary named "Sum1", residing in an EUL named eul31, and write to a log file named del.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /delete /folder Sales /summary Sum1 /eul eul31 /log del.log</pre>

## /delete\_bus\_area

This command enables you to remove a Discoverer business area from the database. See also ["/delete\\_eul"](#) and ["/delete"](#).

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<code>/delete_bus_area &lt;business area&gt;</code>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<p>Modifiers for configuring the deletion:</p> <pre>"/keep_folder" "/log" &lt;log file name&gt; ["/log_only"] "/show_progress"</pre>
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>This command has been superseded by the <a href="#">"/delete"</a> command, and is included for backwards compatibility. For more information about the <code>/delete</code> command, see <a href="#">"/delete"</a>.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To delete the Business Areas named Test BA and Final BA, and write to a log file named delba.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /delete_bus_ area "Test BA, Final BA" /log delba.log</pre>

## /delete\_eul

This command enables you to delete the current Discoverer EUL. You can also selectively remove individual EUL objects using the `"/delete"` command.

Information	Details
■ Syntax:	<code>/delete_eul</code>
■ Modifiers:	<code>"/log"</code> <code>"/show_progress"</code>
■ Restrictions:	You can only delete EULs for which you are the registered owner.
■ Example:	<code>dis5adm.exe /connect me/mypassword /delete_eul /log "c:\my log dir\delete_eul.log"</code>

## /export (EUL objects)

This command enables you to export EUL objects to a Discoverer export file (EEX file). You can selectively export individual EUL objects (e.g. folders, business areas, functions) or entire EULs (using the `/all` modifier). When you import multiple files, Discoverer automatically resolves references between the files. For example, you can export the Emp folder in fileA.eex and the Dept folder in fileB.eex. If Emp and Dept are joined, the join information will actually be in both files, but neither file contains the information for both folders. If you import both files, the join will be recreated when the second file is processed.

Information	Details
■ Syntax:	<code>/export &lt;filename&gt; [&lt;bus_area_name&gt;]</code> Or <code>/export &lt;filename&gt; &lt;modifier(s)&gt; [/identifier]</code>

Information	Details
<ul style="list-style-type: none"> <li>■ Modifiers:</li> </ul>	<pre> "/all" /asm_policy &lt;asm policy&gt; "/audit_info" &lt;audit details&gt; "/business_area" &lt;business area&gt; "/external_element" &lt;filename&gt; (this filename refers to an xml file, not the export filename) "/folder" &lt;folder&gt; "/function" &lt;function&gt; "/hierarchy" &lt;hierarchy&gt; "/identifier" "/item_class" &lt;item_class&gt; "/log" &lt;log file name&gt; [log_only] "/summary" &lt;summary&gt; /set_created_by &lt;creator name&gt; /set_updated_by &lt;updated name&gt; "/show_progress" "/workbook" &lt;workbook&gt; [XML_workbook] "/xmlworkbook" (takes no parameters) </pre>
<ul style="list-style-type: none"> <li>■ Notes:</li> </ul>	<p>&lt;filename&gt; - The name of the target *.EEX file. If a directory path is not specified, the target file is created in the default Discoverer folder. To override the default target directory setting, specify a directory path for the file, for example c:\data\sales.eex . Note that the directory path must be an absolute path, not a relative path.</p> <p>Wildcards are not allowed for parameters (e.g. business areas, folders) these must be named explicitly.</p> <p>[&lt;bus_area_name&gt;] - Use this option to export an entire business area and contents. If you only want to export the business area definition and metadata for the contents, use the /business_area modifier.</p> <p>When you export a business area using the /business_area modifier, Discoverer exports only business area definitions and links to the folders in the business area. Discoverer will export the folders and workbooks only when they are specified by name.</p> <p>&lt;modifiers&gt; - When specifying parameters, you can use either their Display Name or Identifier.</p> <p>To maintain data relationships, you must also export linked (or joined) objects.</p>

Information	Details
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To export two business areas named Test BA and Final BA, residing in an EUL named eul31, into a file named export.eex, and write to a log file named export.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword@database /export export.eex "Test BA, Final BA" /eul eul31 /log export.log</pre>

## /import (Business Area)

This command enables you to import a Discoverer business area into the database from an EEX file. For more information about selectively importing Discoverer EUL objects, see ["/import \(EUL objects\)"](#).

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/import &lt;file name&gt;</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<pre>"/log" &lt;log file name&gt; [log_only] "/rename" &lt;rename-policy&gt; "/show_progress"</pre>
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>This command has been superseded by the <code>/import (EUL objects)</code> command, and is included for backwards compatibility. For more information about the <code>/import</code> command, see <a href="#">"/import (EUL objects)"</a>.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To import the business area in the file myBA.eex, and write to a log file named impba.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /import myBA.eex /log impba.log</pre>

## /import (EUL objects)

This command enables you to import EUL objects from one or more Discoverer export files (EEX files). Discoverer export files are created using the `/export` command, and contain EUL objects (e.g. folders, business areas, functions, or an entire EUL).

Information	Details
■ Syntax:	<code>/import &lt;"sourcefilename1.eex sourcefilename2.eex etc."&gt; &lt;modifier(s)&gt; [/identifier]</code>
■ Modifiers:	<code>"/eul"&lt;EUL&gt; "/identifier" "/keep_format_properties" "/log" &lt;log file name&gt; [log_only] /preserve_workbook_owner "/refresh"   "/rename" "/show_progress"</code>
■ Notes:	<p>&lt;source filename(s)&gt; - the name(s) of the source *.EEX file(s). You must specify the full path name for the file (e.g. 'c:\data\sales.eex'). Note that the directory path must be an absolute path, not a relative path.</p> <p>Wildcards are not allowed for parameters (e.g. business areas, folders) these must be named explicitly.</p> <p>Where multiple files are being imported, all files must be encapsulated in one pair double quotes and separated by spaces (for example, see syntax above).</p>
■ Example	<code>dis5adm.exe /connect &lt;userid&gt;/&lt;password&gt;@&lt;dbalias&gt; /import "file1.eex file2.eex"</code>

## /load

This enables you to bulk load data from a database into a Discoverer business area.

.

Information	Details
■ Syntax:	/load <bus_area>
■ Modifiers:	<pre> "/aggregate" &lt;aggregate&gt; "/capitalize" "/date_hierarchy" &lt;date_hier&gt; "/db_link" &lt;db_link&gt; "/description" &lt;descrip&gt; "/eul" &lt;eul_name&gt; "/insert_blanks" "/join" &lt;join_policy&gt; "/log" &lt;log_file&gt; "/low" &lt;low&gt; "/object" &lt;obj_name&gt; "/remove_prefix" "/show_progress" "/sort_folders" /sort_items "/source" &lt;source&gt; "/user" &lt;user_id&gt; </pre>

Information	Details
■ Notes:	<p data-bbox="548 265 1100 289">When using the <code>/load</code> command, note the following:</p> <ul style="list-style-type: none"><li data-bbox="548 305 1172 409">■ Specify the source of the data (default is the current database server). If you are loading data from an EUL Gateway, the source name must exactly match the EUL Gateway name.</li><li data-bbox="548 425 1219 529">■ Specify an EUL in which to load the objects (default is the Discoverer manager's own EUL). If you specify the EUL, you must have access privileges to the named EUL in order for the operation to succeed. .</li><li data-bbox="548 545 1219 597">■ Specify an alternative database link from which to fetch the data (default is the current connection).</li><li data-bbox="548 612 1196 664">■ Filter the load by schema name (<code>/user</code>) (default is that no filter is used).</li><li data-bbox="548 680 1176 732">■ Filter the load by object name (default is that no filter is used).</li><li data-bbox="548 748 1210 826">■ Specify pre-formatting of the data with respect to capitalization, prefixes and blank spaces (default is that no pre-formatting is done).</li><li data-bbox="548 841 1200 894">■ Specify a date hierarchy (default is the Discoverer default date hierarchy).</li><li data-bbox="548 909 1200 987">■ Specify which datatypes should have an associated list of values (default is that datatypes have no associated list of values).</li><li data-bbox="548 1003 1219 1055">■ Specify the default aggregate to use on data points (default is SUM).</li><li data-bbox="548 1071 1210 1123">■ Provide a description for the new Business Area (default is NULL).</li><li data-bbox="548 1138 1186 1190">■ Specify the join policy (default is primary key) and a log file.</li><li data-bbox="548 1206 1200 1277">■ <b>Note:</b> When doing a bulk load from an Oracle9i database, constraints on views are also considered when Discoverer creates joins.</li></ul>



Information	Details
<ul style="list-style-type: none"> <li>Restrictions:</li> </ul>	<p><code>/db_link</code> &amp; <code>/source</code> cannot be used in conjunction with an ODBC database.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>You want to bulk load into an EUL named eul31 from an Oracle Designer source on the current connection, creating a new business area named Test BA that:</p> <ul style="list-style-type: none"> <li>contains tables matching the pattern test% owned by user Bob</li> <li>pre-formats columns to remove prefixes, remove blanks, and capitalize them</li> <li>contains no date hierarchy</li> <li>contains lists of values for CHAR, INTEGER, and DECIMAL, using AVG as the aggregate</li> <li>writes to a log file named load.log</li> </ul> <p>To perform the above bulk load, enter:</p> <pre>dis5adm.exe /connect me/mypassword /load "Test BA" /source "Designer 6i - bobsworkarea" /eul eul31 /user bob /object test% /capitalize /remove_prefix /replace_blanks /date_hierarchy " " /lov "CHAR, INTEGER, DECIMAL" /aggregate AVG /log load.log /description "Test BA"</pre>

## `/refresh_bus_area`

This command enables you to refresh one or more Discoverer Business Areas, by retrieving an up-to-date EUL structure from the database.

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/refresh_bus_area &lt;bus_area&gt;</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<pre>"/db_link" "/eul" "/log" "/schema" "/source" "/show_progress"</pre>

Information	Details
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>When using the <code>/refresh_bus_area</code> command, note the following:</p> <ul style="list-style-type: none"> <li>Specify the data source from which to refresh the named Business Area(s).</li> <li>Specify an EUL in which to find the business area(s) to refresh. The Discoverer manager's own EUL is the default. If you specify the EUL, you must have access privileges to the named EUL in order for the operation to succeed.</li> <li>Filter the refresh by schema name. By default, no filter is used.</li> <li>Specify a log file.</li> </ul>
<ul style="list-style-type: none"> <li>Restrictions:</li> </ul>	<p><code>/db_link &amp; /source</code> cannot be used in conjunction with an ODBC database.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To refresh two Business Areas named Test BA and Final BA that reside in an EUL named eul31, from an Oracle Designer source on the current connection that contains tables matching the pattern test% owned by user Bob, and summarize information in a log file named refba.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /refresh_bus_area "Test BA, Final BA" /source "Designer 6i - bobsworkarea" /eul eul31 /user bob /log refba.log</pre>

## `/refresh_folder`

This command enables you to refresh one or more Discoverer folders. The query on which the folder is based is re-run in order to retrieve up-to-date data.

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/refresh_folder &lt;folder&gt;</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<pre>"/log" "/show_progress" "/source" "/user" &lt;username&gt;</pre>

Information	Details
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>When using the <code>/refresh_folder</code> command, note the following:</p> <ul style="list-style-type: none"> <li>The Discoverer manager's own EUL is the default EUL for the search.</li> <li>Specify a log file path (optional). A status message indicating the success or failure of the operation will be output to the specified log file path, or the default log file if one is not specified.</li> </ul>
<ul style="list-style-type: none"> <li>Restrictions:</li> </ul>	<p>This option cannot be used in conjunction with an ODBC database.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<p>To refresh two folders named Sales1 and Sales2, residing in a Business Area named Test BA, found in an EUL named eul31, and write to a log file named reffol.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /refresh_folder "Sales1, Sales2" /log reffol.log</pre>

## **/refresh\_summary**

This command enables you to refresh one or more Discoverer Summary folders. The query on which the summary is based is re-run in order to retrieve up-to-date data.

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/refresh_summary &lt;summary&gt; &lt;bus_area&gt;</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<pre>"/log" "/show_progress"</pre>

Information	Details
■ Notes:	<p>When using the <code>/refresh_summary</code> command, note the following:</p> <ul style="list-style-type: none"><li>■ Specify in which EUL the Business Area can be found. The Discoverer manager's own EUL is the default EUL for the search. If you specify the EUL, you must have access privileges to the named EUL in order for the operation to succeed.</li><li>■ It is necessary to name at least one summary folder and explicitly name the Business Area in which the summary resides.</li><li>■ Specify a log file path (optional).</li><li>■ A status message indicating the success or failure of the operation will be output to the specified log file path, or the default log file if one was not specified.</li></ul>
■ Restrictions:	<p>This command cannot be used in conjunction with an ODBC database.</p>
■ Example:	<p>To refresh two summaries named Summary1 and Summary2, residing in a Business Area named Test BA, found in an EUL named eul31, and write to a log file named refsum.log, enter:</p> <pre>dis5adm.exe /connect me/mypassword /refresh_summary "Summary1, Summary2" "Test BA" /log refsum.log /eul eul31</pre>

## Discoverer Administrator command modifier reference

This section contains detailed reference information about optional command modifiers available in the Discoverer command line interface. Command modifiers are used to refine or qualify commands. Note the following:

- Command modifiers are listed in alphabetical order.
- For more information about commands, see "[Discoverer Administrator command reference](#)".

## /aggregate

The `/aggregate` modifier enables you to specify the default aggregate to be used by a command.

Information	Details
■ Syntax:	<code>/aggregate &lt;SUM MAX MIN COUNT AVG DETAIL&gt;</code>

## /all

The `/all` modifier enables you to select every object in an EUL for import, export, or deletion.

Information	Details
■ Syntax:	<code>/all</code>

## /apps\_grant\_details

The modifier `/apps_grant_details` enables you to specify an Oracle Applications schema and password when creating an Oracle Applications mode EUL. For example, to specify the Oracle Applications foundation name and password (`<fndnam>/<password>`).

Information	Details
■ Syntax:	<code>/apps_grant_details &lt;schema&gt;/&lt;password&gt;</code>

## /apps\_responsibility

The modifier `/apps_responsibility` enables you to specify an Oracle Applications responsibility when connecting as an Oracle Applications database user. This can also be included immediately following a colon (:) placed after the Oracle Applications user name but before the password.

Information	Details
■ Syntax:	<code>/apps_responsibility &lt;"Oracle Applications responsibility name"&gt;</code>

## /apps\_security\_group

The `/apps_security_group` modifier enables you to specify an Oracle Applications security group when connecting as an Oracle Applications database user.

Information	Details
■ Syntax:	<code>/apps_security_group &lt;"Oracle Applications security group name"&gt;</code>

## /asm\_space, /asm\_tablespace

The `/asm_tablespace` modifier ignores any tablespace value set in the ASM policy and uses this tablespace constraint instead. The `/asm_space` modifier ignores any space value set in the ASM policy and uses this space constraint instead. The following are valid combinations of tablespace and space values:

- No command line modifiers - The ASM policy tablespace and space will be used.
- `/asm_space` - The ASM policy tablespace will be used with the specified value of space.
- `/asm_tablespace /asm_space` - The specified values of tablespace and space will be used. An error will be raised if you specify an invalid tablespace.

Information	Details
■ Syntax:	<code>/asm [/asm_space &lt;bytes&gt;   /asm_space &lt;bytes&gt; /asm_tablespace &lt;tablespace name&gt;]</code>

## /audit\_info

The `/audit_info` modifier enables you to export audit fields with every object, (Created By, Created Date, Updated By, Updated Date). You can override the Created By and Updated By fields using the additional modifiers `/set_created_by` and `/set_updated_by`.

Information	Details
■ Syntax:	<code>/audit_info [:/set_created_by&lt;name of creator&gt;] [:/set_updated_by&lt;name of updater&gt;]</code>

## /ba\_link

The `/ba_link` modifier enables you to specify a business area and folder for deletion.

Information	Details
■ Syntax:	<code>/ba_link &lt;business area&gt;.&lt;folder&gt;</code>

## /business\_area

The `/business_area` modifier enables you to specify a business area for import, export, or deletion.

Information	Details
■ Syntax:	<code>/business_area &lt;business area&gt;</code>

## /capitalize

The `/capitalize` modifier enables you to request that folder names have initial capital letters when they are generated from their respective column names during a bulk load.

Information	Details
■ Syntax:	<code>/capitalize</code>

## /condition

The `/condition` modifier enables you to specify a condition for deletion.

Information	Details
■ Syntax:	<code>/condition &lt;condition&gt;</code>

## /date\_hierarchy

The `/date_hierarchy` modifier enables you to specify the date hierarchy to be used during a bulk load.

Information	Details
■ Syntax:	<code>/date_hierarchy &lt;date_hier&gt;</code>

Information	Details
■ Notes:	Any valid date hierarchy name or "". If you set <date_hier> to "", Discoverer Administrator will not create a hierarchy for dates during bulk load.

## /db\_link

The /db\_link modifier enables you to specify the database link to be used by a command.

Information	Details
■ Syntax:	/db_link <db_link>
■ Notes:	<db_link> can be any valid database link.
■ Restrictions:	This modifier cannot be used in conjunction with an ODBC database.

## /description

The /description modifier enables you to specify a description for an object.

Information	Details
■ Syntax:	/description <description>
■ Notes:	<description> can be any string.

## /eul

The /eul modifier enables you to specify an EUL on which to run a command. You must have access privileges to the specified EUL. If not specified, the default EUL for the database user is used.

Information	Details
■ Syntax:	/eul <EUL>
■ Notes:	<EUL> must be the name of a valid EUL.

Note that this does not change the default EUL for the user.



## /eul\_language

The `/eul_language` modifier used (currently by Oracle Applications) with the `/create_eul` command, enables you to specify a language for the EUL.

Information	Details
■ Syntax:	<code>/eul_language &lt;language&gt;</code>

## /external\_element

The `/external_element` modifier is used only with the `/export` command. The `external_element` modifier enables you to place XML code from a specified file at the top of the export file.

Information	Details
■ Syntax:	<code>/external_element &lt;filename&gt;</code>
■ Notes:	<p>To use this modifier you enter the XML (that you want to place at the top of the export file) into a separate file then include this filename as the <code>&lt;filename&gt;</code> argument.</p> <p>The <code>/external_element</code> modifier can be used multiple times in the same export operation (see example below).</p> <p><code>&lt;filename&gt;</code> is the name of the file containing the xml that you want to include in the <code>.eex</code> file.</p>
■ Example	<pre>dis5adm.exe /connect me/mypassword /export myBA.eex bus_area1 /external_element custom1.xml /external_element custom2.xml</pre> <p>This places the xml from the files <code>custom1.xml</code> and <code>custom2.xml</code> into the top of the export file <code>myBA.eex</code>.</p>

## /folder

The `/folder` modifier enables you to specify a folder for import, export, or deletion.

Information	Details
■ Syntax:	<code>/folder &lt;folder&gt;</code>

## **/function**

The `/function` modifier enables you to specify a function for import, export, or deletion.

<b>Information</b>	<b>Details</b>
■ Syntax:	<code>/function &lt;PL/SQL function&gt;</code>

## **/hier\_node**

The `/hier_node` modifier enables you to specify a node in a hierarchy for deletion.

<b>Information</b>	<b>Details</b>
■ Syntax:	<code>/hier_node &lt;hierarchy&gt;.&lt;hierarchy node&gt;</code>

## **/hierarchy**

The `/hierarchy` modifier enables you to specify a hierarchy

<b>Information</b>	<b>Details</b>
■ Syntax:	<code>/hierarchy &lt;hierarchy&gt;</code>

## **/identifier**

The `/identifier` modifier enables you to specify EUL objects by Identifier, rather than by Display Name. If not specified, the object is identified by Display Name by default.

<b>Information</b>	<b>Details</b>
■ Syntax:	<code>/identifier &lt;identifier&gt;</code>

## **/insert\_blanks**

The `/insert_blanks` modifier enables you to request that folder names have spaces instead of underscore characters when they are generated from their respective column names during a bulk load.

Information	Details
■ Syntax:	<code>/insert_blanks</code>

## **/item**

The `/item` modifier enables you to specify an item for deletion.

Information	Details
■ Syntax:	<code>/item &lt;item&gt;</code>

## **/item\_class**

The `/item_class` modifier enables you to specify an item class for import, export, or deletion.

Information	Details
■ Syntax:	<code>/item_class &lt;item class&gt;</code>

## **/join**

The `/join` modifier has two applications depending on which command you use it with:

- Used with the `/load` command, the join modifier enables you to specify how Discoverer Administrator creates joins during a bulk load.

- Used with the `"/delete"` command, the `/join` modifier enables you to remove a specific join.

Information	Details
■ Syntax:	Used with the <code>/load</code> command: <code>/join &lt;NONE COLUMN NAME PRIMARY KEY&gt;</code> Used with the <code>/delete</code> command: <code>/join &lt;join name&gt;</code>

## `/keep_folder`

The `/keep_folder` modifier enables you to leave the folders in place when deleting a business area. If not specified, the folders are removed along with the business area.

Information	Details
■ Syntax:	<code>/keep_folder</code>

## `/keep_format_properties`

The `/keep_format_properties` modifier enables you to keep existing format properties (e.g. display names, descriptions) on import. The default is to change format properties.

Information	Details
■ Syntax:	<code>/keep_format_properties</code>

## `/log`

The `/log` modifier enables you to specify a name for the log file that stores command status messages. After each command is executed, Discoverer Administrator writes a status message indicating whether the command was successful. You can override the name and location of the log file using the `/log` modifier.

Information	Details
■ Syntax:	<code>/log &lt;filename&gt;</code>
■ Notes:	Any valid filename (dependent on the operating system).

## /log\_only

The `/log_only` modifier enables you to simulate a command and generate a log, without changing your data. This option enables you to check for errors and exceptions before changing your data.

Information	Details
■ Syntax:	<code>/log &lt;filename&gt; [/log_only]</code>
■ Notes:	Any valid filename (dependent on the operating system). The optional <code>log_only</code> argument enables you to simulate an import and generate a log, without importing the data. This option enables you to check for import errors before changing your data

## /lov

The `/lov` modifier enables you to specify the data types for which a list of values should be generated during a bulk load.

Information	Details
■ Syntax:	<code>/lov [CHAR   DATE   DECIMAL   INTEGER   KEY]</code>

## /object

The `/object` modifier enables you to specify an object for bulk load, import, export, or deletion.

Information	Details
■ Syntax:	<code>/object &lt;mask&gt;</code>
■ Notes:	Any valid object name. You can use wildcard characters.

## /overwrite

The `/overwrite` modifier enables you to overwrite an existing EUL owned by the intended owner. If omitted, the default is to not overwrite an existing EUL.

Information	Details
■ Syntax:	<code>/overwrite</code>

## /parameter

The `/parameter` modifier enables you to specify a parameter for deletion. When specifying parameters, you can use either their Display Name or Identifier.

Information	Details
■ Syntax:	<code>/parameter &lt;folder&gt;.&lt;parameter&gt;</code>

## /password

The `/password` modifier enables you to specify the password to be used by the operation.

Information	Details
■ Syntax:	<code>/password &lt;password&gt;</code>
■ Notes:	Any valid password associated with the value specified by the user.

## /private

When you create an EUL, the `/private` modifier enables you to define its status as private to the Discoverer manager. If omitted, the status defaults to 'public'.

Information	Details
■ Syntax:	<code>/private</code>

## /refresh

The `/refresh` modifier enables you to merge imported objects with existing objects. By default, merged objects are matched on Display name. Use the `"/identifier"` modifier to match on Identifier.

Information	Details
■ Syntax:	<code>/refresh</code>

## /remove\_prefix

The `/remove_prefix` modifier enables you to request that item names do not include the column name prefix when they are generated from their respective column names during a bulk load.

Information	Details	
■ Syntax:	<code>/remove_prefix</code>	
■ Example:	<u>Columns</u>	<u>Items</u>
	EMP_EMPNO	EMPNO
	EMP_ENAME	ENAME

## /rename

The `/rename` modifier enables you to specify which objects are renamed when importing objects that match existing objects.

Information	Details
■ Syntax:	<code>/rename &lt;NEW OLD NONE&gt;</code>
■ Notes:	NEW - rename the imported objects that match the existing objects. OLD - rename the existing objects that match the imported objects. NONE - abort the operation without importing the objects.

## /schema

The `/schema` modifier enables you to specify a schema (user) for the operation.

Information	Details
■ Syntax:	<code>/schema &lt;schema&gt;</code>

## /show\_progress

The `/show_progress` modifier enables you to monitor a command in operation.

Information	Details
■ Syntax:	<code>/show_progress</code>

## /sort\_folders

The /sort\_folders modifier enables you to specify that Discoverer will alphabetically sort folders during a bulk load.

Information	Details
■ Syntax:	/sort_folders <ON OFF>
■ Notes:	ON is the default

## /sort\_items

The /sort\_items modifier enables you to specify that Discoverer will alphabetically sort items during a bulk load.

Information	Details
■ Syntax:	/sort_items <ON OFF>
■ Notes:	OFF is the default

## /source

The /source modifier enables you to specify the source for the operation.

Information	Details
■ Syntax:	/source <server gateway>
■ Notes:	<server> is the name of a native Oracle database <gateway> is the name of an Oracle Designer object or other gateway. The gateway name must exactly match the gateway name displayed in the Load Wizard. In the case of Oracle Designer, specify "Designer 6i - <workarea name>" (if you are using a version of Oracle Designer prior to Oracle Designer 6i, simply specify "Oracle Designer repository").
■ Restrictions:	This modifier cannot be used in conjunction with an ODBC database.



## /summary

The `/summary` modifier enables you to specify a summary for import, export, or deletion.

Information	Details
■ Syntax:	<code>/summary &lt;summary&gt;</code>

## /user

The `/user` modifier enables you to specify the user ID to be used for the operation.

Information	Details
■ Syntax:	<code>/user &lt;user_id&gt;</code>
■ Notes:	Any valid user ID.

## /workbook

The `/workbook` modifier enables you to specify a workbook for import, export, or deletion.

Information	Details
■ Syntax:	<code>/workbook &lt;workbook&gt;</code>

## /xmlworkbook

The `/xmlworkbook` modifier (used with the `/export` command) forces all workbooks to be exported both in XML format and binary large object (BLOB) format. The `/xmlworkbook` modifier enables you to view exported workbooks in an XML browser.

Information	Details
■ Syntax:	<code>/xmlworkbook</code> (takes no parameters)

## Discoverer Desktop command reference

This section contains detailed reference information about each command in the Discoverer Desktop command line interface. Note that commands are listed in alphabetical order.

## /?

This command displays a list of Discoverer Desktop commands.

Information	Details
■ Syntax:	/?
■ Modifiers:	None
■ Notes:	None
■ Restrictions:	None
■ Example:	dis5usr.exe /?

## /batch

This command enables you to run workbooks without delaying the processing of subsequent workbooks.

Information	Details
■ Syntax:	/batch
■ Modifiers:	None
■ Notes:	Causes the UI not to wait for end user input before continuing. This is intended to allow subsequent workbooks/sheets to be processed even if an earlier one fails.
■ Restrictions:	None

## /connect

This command enables you to connect directly to Discoverer Desktop without having to use the Connect dialog.

Information	Details
■ Syntax:	/connect <username>/<password>[@<database>]
■ Modifiers:	None
■ Notes:	Connects you to the database with the specified username and password. This command skips the Connect dialog provided that the username/password@database information is correct.

Information	Details
<ul style="list-style-type: none"> <li>Restrictions:</li> </ul>	<p>If the login details are insufficient to connect to the database the Desktop displays the Connect dialog with the information you specified in the command line interface.</p> <p>For example if the command line interface specifies:</p> <pre>username@dbname</pre> <p>Discoverer displays the Connect dialog, the user field displays 'username', the database field displays 'dbname' and the password field is empty.</p>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<pre>dis5usr.exe /connect jchan/jchan@dbname</pre>

## /export

This command enables you to export the results of a workbook to a specified file.

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/export &lt;format&gt; &lt;export-file&gt;</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<p>None</p>
<ul style="list-style-type: none"> <li>Notes:</li> </ul>	<p>Exports the results of a workbook to the specified file(e.g. wks, sylk).</p>
<ul style="list-style-type: none"> <li>Restrictions:</li> </ul>	<p>If the end user does not specify a sheet on the command line interface, only the active sheet is exported to the file.</p> <p>If the end user specifies a sheet in the command line interface, only that sheet is exported.</p> <p>If the end user specifies all sheets in the command line interface, each is exported to a separate file, named</p> <pre>&lt;file&gt; &lt;sheet-name&gt;.&lt;ext&gt;</pre>
<ul style="list-style-type: none"> <li>Example:</li> </ul>	<pre>dis5usr.exe /export wks worksheet2.wks</pre>

## /open

This command enables you to open a workbook from a .dis file.

Information	Details
<ul style="list-style-type: none"> <li>Syntax:</li> </ul>	<pre>/open &lt;file-workbook&gt;</pre>
<ul style="list-style-type: none"> <li>Modifiers:</li> </ul>	<p>None</p>

Information	Details
■ Notes:	
■ Restrictions:	
■ Example:	<code>dis5usr.exe /open workbook1.dis</code>

## /opendb

This command enables you to open a workbook from the database.

Information	Details
■ Syntax:	<code>/opendb &lt;db-workbook&gt;</code>
■ Modifiers:	None
■ Notes:	
■ Restrictions:	
■ Example:	<code>dis5usr.exe /opendb workbook1.dis</code>

## /parameter

This command enables you to set a specified parameter to a specified value.

Information	Details
■ Syntax:	<code>/parameter &lt;parameter name&gt; &lt;parameter value&gt;</code>
■ Modifiers:	None
■ Notes:	
■ Restrictions:	If the end user does not specify a value for a parameter in a workbook then Discoverer uses a default value.
■ Example:	<code>dis5usr.exe /parameter year 2001</code>

## /p

This command enables you to print a workbook from a file to a default printer.

Information	Details
■ Syntax:	<code>/p &lt;file&gt;</code>
■ Modifiers:	None

Information	Details
■ Notes:	Print options are saved as part of the workbook.
■ Restrictions:	

## /pt

This command enables you to print a workbook from a file to a specified printer with specified printer driver and port.

Information	Details
■ Syntax:	/pt <file> <printer> <driver> <port>
■ Modifiers:	None
■ Notes:	
■ Restrictions:	

## /sheet

This command enables you execute a query for the specified sheet(s).

Information	Details
■ Syntax:	/sheet {<sheet-name> <sheet-number> ALL}
■ Modifiers:	None
■ Notes:	Discoverer executes a query for : <ul style="list-style-type: none"> <li>■ the specified sheet number &lt;sheet-number&gt;</li> <li>■ the sheet name &lt;sheet-name&gt;</li> <li>■ all sheets (ALL).</li> </ul>
■ Restrictions:	



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## Discoverer registry settings

### Discoverer registry settings

This chapter describes the Discoverer registry settings, and contains the following topics:

- ["What are Discoverer registry settings?"](#)
- ["About Discoverer Plus and Discoverer Viewer registry settings"](#)
- ["About Discoverer Administrator and Discoverer Desktop registry settings"](#)
- ["What are the Discoverer Administrator and Discoverer Desktop registry settings?"](#)
- ["How to edit Discoverer Administrator and Discoverer Desktop registry settings"](#)

### What are Discoverer registry settings?

Discoverer registry settings control how Discoverer behaves under certain conditions. A Discoverer registry setting comprises:

- the name of the registry setting, which is usually a character string (e.g. QPPEnable)
- the value of the registry setting (e.g. 1, 0, a character string)

By default, each registry setting is set to the most commonly required value. However, in some cases you might want to change the value of a registry setting.

The location of Discoverer registry settings depends on the Discoverer product you are using:

- Discoverer Plus and Discoverer Viewer registry settings are held in a registry file called `reg_key.dc`
- Discoverer Administrator and Discoverer Desktop registry settings are held in the Windows registry

## About Discoverer Plus and Discoverer Viewer registry settings

Discoverer Plus and Discoverer Viewer use registry settings stored in a registry file called `reg_key.dc`. The `reg_key.dc` file is located on the middle tier server machine in one of the following locations:

- the `\bin` directory (the default)
- the directory specified by the environment variable `DC902_REG`

When an end user changes a user preference in Discoverer Plus or Discoverer Viewer, Discoverer writes the change (for the current user) to the `reg_key.dc` file under the following registry key:

```
\\HKEY_LOCAL_MACHINE\Software\Oracle\Oracle9iASDiscoverer\...
```

The username of the current user is included in the registry key.

For more information about the Discoverer Plus and Discoverer Viewer registry settings, see the *Oracle9iAS Discoverer Configuration Guide*.

## About Discoverer Administrator and Discoverer Desktop registry settings

Discoverer Administrator and Discoverer Desktop use registry settings stored in the Windows registry.

When an end user changes a user preference in Discoverer Administrator or Discoverer Desktop, Discoverer writes the change (for the current user) to the Windows registry under the following registry key:

```
\\HKEY_CURRENT_USER\Software\Oracle\Discoverer 902\...
```

If you want to change Windows registry settings:

- take a copy of the Windows registry before making any changes
- be careful not to make any unintended modifications



- if in any doubt about what to do, contact your system administrator

## What are the Discoverer Administrator and Discoverer Desktop registry settings?

The following table contains the Discoverer Administrator and Discoverer Desktop registry settings in the Windows registry that you might need to change.

**Hint:** To change the value of a registry setting or to add a registry setting that is not visible in the Windows Registry Editor, see "[How to edit Discoverer Administrator and Discoverer Desktop registry settings](#)".

*Table 22-1 Discoverer Administrator and Discoverer Desktop registry settings*

Directory\Item Key Name	Description	Default/Values
Database\ArchiveCacheFlushInterval	This setting controls the interval between EUL cache flushes during Export and Import of .eex files. Used to avoid excessive memory usage during the Exp or Imp of a very large archive	'Default:1000' >=0 The number of objects that are processed between EUL cache flushes when importing and exporting .eex files
Database\BusinessAreaFastFetchLevel	This setting controls the amount of pre-caching that occurs for folders and items whenever a business area is fetched.  In general terms, the lower the value, the fewer folders and items are immediately fetched into the Navigator dialog.	'Default: 1'  0 - No Fast Fetch  1 - Fast Fetch the folders within each business area  2 - Fast Fetch folders within each business area and items in user mode only  3 - Fast Fetch folders within each business area and items in admin mode only  4 - Fast Fetch folders and items within each business area

**Table 22–1 Discoverer Administrator and Discoverer Desktop registry settings**

Directory\Item Key Name	Description	Default/Values
Administrator\CreateJoinInOtherBAs	<p>This setting enables you to control the extent to which Discoverer Administrator generates joins when you load or refresh a folder. By default, joins are only generated automatically between folders within the same business area. However, you can specify that joins are created automatically across business areas as well.</p> <p>This setting controls that option.</p>	<p>'Default:0'</p> <p>0 - Do not generate/check joins to folders outside the current business area.</p> <p>&gt;0 - Generate/check joins to folders outside the current business area.</p>
Database\DisableAutoOuterJoinsOnFilters	<p>This setting toggles the behaviour of Discoverer when running queries involving an outer join with a condition (or conditions) applied. The effect of this setting is explained in an example in <a href="#">Chapter 10, "Creating and maintaining joins"</a></p>	<p>'Default:0'</p> <p>0 - Do not disable outer joins on filters</p> <p>1 - disable outer joins on filters</p>
Database\DisableMultiJoinDetection	<p>This setting toggles multiple join path detection when creating worksheets in Desktop.</p> <p>When this setting = 1, Desktop selects all join options when creating a worksheet.</p> <p>When this setting = 0 and multiple joins exist, Desktop displays the Join Folders dialog where you choose the join(s) to use for the worksheet.</p> <p><b>Note:</b> It is recommended that Desktop users select all available joins for Discoverer to display accurate results data.</p>	<p>Default:0</p> <p>1 - Disable multiple join detection.</p> <p>0 - Do not disable multiple join detection.</p>
Database\EULUpgradeForceCommitForAllSteps	<p>This affects the commit processing and hence rollback space usage during the upgrade of a previous version EUL. If you are having problems upgrading an EUL due to limited rollback space, it is possible to commit more frequently using this setting.</p>	<p>0</p>

**Table 22–1 Discoverer Administrator and Discoverer Desktop registry settings**

Directory\Item Key Name	Description	Default/Values
Database\EULUpgradeRollbackSegment	If this setting is defined then it should be the name of the rollback segment that you want to be used for the duration of the upgrade. In other words, if set to "Large_RB1", a "SET TRANSACTION USE ROLLBACK SEGMENT Large_RB1" statement would be issued.	'Default type: string' 'Default value: "" '
Database\FormatXML	Set the value to 1 if you want the XML export file to include spaces that make the file more readable, but larger.  If the value is 0 or the entry is not present, the export file will not use indentation thus reducing file size.	'Default: 0' 0 = use indentation 1 = include spaces
Database\MaxNumberJoinPredicates	During bulk load you have an option to create an automatic join based on column names (rather than primary/foreign keys). If you have the same table already loaded, then a join will be created that matches every column in the table. You can stop these being created by specifying the maximum number of predicates in one join using matching column names during bulk load.	'Default:20'
Database\ObjectsAlwaysAccessible	By default, when Desktop displays folders and items in the Item Navigator, it validates that the tables/views they refer to exist and that the user has access to them. This setting enables you to disable this validation.  Disabling this validation speeds up the display of folders and items in the Item Navigator. When a user executes a query, if the database objects do not exist or the user does not have access to them and this setting is set to 1, Desktop displays an error (e.g. "ORA 942 Table or View does not exist")	'Default:0' 0 - Enable object accessibility validation 1 - Disable object accessibility validation

**Table 22–1 Discoverer Administrator and Discoverer Desktop registry settings**

Directory\Item Key Name	Description	Default/Values
Database\QPPCBOEnforced	<p>Will use cost-based optimizer if set to 1. Will use default optimizer if set to 0.</p> <p>Query Prediction needs to parse statements to obtain their cost. The cost is only available when parsing with the cost based optimizer (it is not produced if parsing with the rule based optimizer). The default behavior in Discoverer is to force the use of the cost based optimizer when parsing these statements.</p> <p>If this registry setting is set to 0 Discoverer will use the default optimizer for the database and for the tables involved in the query. In other words if the default optimizer is rule-based and the tables have not been analyzed, query prediction will not be available.</p>	<p>'Default:1'</p> <p>0 - use the default query optimizer</p> <p>1 - use the cost based optimizer</p>
Database\QPPCreateNewStats	<p>Records new statistics if set to 1. These statistics are used by Query Prediction</p> <p>If you set this to zero, Discoverer does not create any new statistics for query prediction.</p>	<p>'Default:1'</p> <p>0 - false</p> <p>1 - true</p>
Database\QPPEnable	<p>This setting enables you to turn Query Prediction on or off.</p> <p>Uses Query Prediction (QPP) if set to 1.</p>	<p>'Default:1'</p> <p>0 - false</p> <p>1 - true</p>
Database\RdbFastSQLOff	<p>This only applies to Discoverer against RDB. If set to 1, it turns off "fast sql" on the RDB server.</p> <p>Only use this registry setting if errors are encountered against Oracle Rdb because it might help avoid some types of problems. See <a href="#">Chapter 23, "Discoverer support for Oracle Rdb and non-Oracle databases"</a> for further information about support for Oracle Rdb.</p>	<p>'Default:1'</p> <p>0 - false</p> <p>1 - true</p>

**Table 22–1 Discoverer Administrator and Discoverer Desktop registry settings**

Directory\Item Key Name	Description	Default/Values
Application\ShowReadOnlyPrompt	You can set the operating system privilege for a file-based workbook to read-only. In this instance, when a user opens the workbook they get a warning message informing them that the workbook cannot be opened for read/write and to save any changes to another workbook. This registry setting enables you to switch this warning on and off.	'Default:0' 0 - false 1 - true
Database\SQLType	This entry determines how SQL is displayed in the SQL Inspector dialog.	'Default:0' 0 - flattened SQL, (i.e standard Oracle format) 1 - odbc SQL 2 - native SQL (i.e. Discoverer SQL sent to the kernel, with inline views)
Database\SummariesAlwaysAccessible	<p>This setting displays summary folders quickly from the Summaries tab and makes them all appear to be accessible (regardless of whether they are or not). This setting avoids validation and checks (which can be slow) and enables users to display/modify summary folders quickly. Only setups with large numbers of summary folders are likely to need to use this setting.</p> <p><b>Note:</b> Be aware that if you enable this setting, invalid summary folders are not shown as being invalid in the UI and the UI will not reflect this until this setting is disabled. This might cause the Discoverer manager to miss required action.</p> <p>Set this to "1" for faster display of summary folders from the Summaries tab.</p> <p>Set this to "0" to validate summary folders before displaying them at the Summaries tab.</p>	'Default:0' 0:-false 1-true

**Table 22–1 Discoverer Administrator and Discoverer Desktop registry settings**

Directory\Item Key Name	Description	Default/Values
Administrator\TablespaceForMVS	Controls which tablespace a user points to on DB2. This registry setting is typically used when installing the End User Layer.	No default

## How to edit Discoverer Administrator and Discoverer Desktop registry settings

You edit Discoverer Administrator and Discoverer Desktop registry settings using the Windows registry editor.

How to start the Registry Editor and edit registry settings will depend on the environment you are using.

To start the Registry Editor and edit Discoverer Administrator and Discoverer Desktop registry settings in a Windows NT4 environment:

1. Choose Run... from the Windows Start menu.
2. In the Run dialog box, type `regedt32` and click OK.
3. Open the `\\HKEY_CURRENT_USER\Software\Oracle\Discoverer 902\` registry key to view the Discoverer Administrator and Discoverer Desktop registry settings.
4. If you want to edit the value of a Discoverer Administrator or Discoverer Desktop registry setting shown in the Registry Editor:
  - a. Double click on the registry setting in the right-hand pane of the Registry Editor to display the DWORD Editor dialog.
  - b. Replace the existing value of the registry setting with a new value and click OK.
5. If you want to edit the value of a Discoverer Administrator or Discoverer Desktop registry setting and the registry setting is not currently shown in the Registry Editor:
  - a. Click on the key name below which the registry setting should appear.  
 For example, if you want to set `QPPEnable` to 0, and `QPPEnable` does not appear in the Registry Editor, click on the `\\HKEY_CURRENT_USER\Software\Oracle\Discoverer 902\Database\` key to select it. For more information about the registry key for a particular registry setting, see

"What are the Discoverer Administrator and Discoverer Desktop registry settings?".

- b. Choose Edit | Add Value to display the Add Value dialog.
- c. Enter the name of the Discoverer registry setting you want to add (e.g. QPPEnable) and click OK.

The String Editor dialog appears.

- d. Enter the value you want the Discoverer registry setting to have (e.g. 1) and click OK.

The registry setting appears in the Registry Editor with the value you specified.

- 6. Choose Registry | Exit to close the Registry Editor.





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# Discoverer support for Oracle Rdb, and non-Oracle databases

## Discoverer support for Oracle Rdb and non-Oracle databases

This chapter contains information about using Discoverer with Oracle Rdb and non-Oracle databases and contains the following topics:

- ["Discoverer support for Oracle Rdb"](#)
- ["Discoverer support for non-Oracle databases using native ODBC drivers"](#)
- ["Discoverer support for non-Oracle databases using generic connectivity"](#)
- ["Discoverer support for non-Oracle databases using the Transparent Gateway"](#)

## Discoverer support for Oracle Rdb

Discoverer can access Oracle Rdb without the need for (and restrictions of) open database connectivity (ODBC). Topics in this section include the following:

- ["What are the software requirements for using Discoverer with Oracle Rdb?"](#)
- ["Which Discoverer features are not supported by Oracle Rdb?"](#)

## What are the software requirements for using Discoverer with Oracle Rdb?

To use Oracle Discoverer directly with Oracle Rdb you must install:

- Oracle9iAS Discoverer V9.0.2, Oracle9i Discoverer Administrator or Desktop
- Oracle Rdb Release 7.0.1.3 or later
- SQL\*Net for Oracle Rdb7 Release 1.0.2. or later

You may find that the version of SQL\*Net for Oracle Rdb7 requires a special patch with bug fixes specifically for Discoverer (for more information, see your database administrator). Providing you have the necessary support agreement, you can obtain this patch by contacting your Oracle support representative.

SQL\*Net for Oracle Rdb7 enables an Oracle Rdb7 server to appear as an Oracle server to the client.

You need to install SQL\*Net for Oracle Rdb7 software only once on each server system. You also need to prepare each Oracle Rdb7 database environment by defining the Oracle functions and the emulated Oracle data dictionary to serve with SQL\*Net for Oracle Rdb7.

For more information about SQL\*Net for Oracle Rdb7, see the following documentation:

- *Guide to SQL\*Net for Rdb7*

This guide helps you set up and use SQL\*Net for Oracle Rdb7 software to configure and develop useful connections between SQL\*Net clients and Oracle Oracle Rdb7 databases.

- *Oracle SQL/Services Release Notes Release 7.1.2*

This manual contains Oracle SQL/Services Release Notes that are specific to SQL\*Net for Oracle Rdb7 Release 7.1.2. The notes describe:

- changed and enhanced features
- upgrade and compatibility information
- new and existing software problems and restrictions
- other software documentation

- *Comparison of SQL Dialects for Oracle and Rdb*

The principal purpose of this manual is to help Discoverer managers (who use SQL\*Net for Oracle Rdb software) to understand differences in the Oracle and Oracle Rdb7 SQL dialects. This manual identifies where differences in the SQL dialects might occur, and provides additional information to help you achieve the desired functions.

## Which Discoverer features are not supported by Oracle Rdb?

The following Discoverer features are not supported when using Discoverer with Oracle Rdb:

**Table 23–1 Features not supported in Discoverer when using Oracle Rdb**

<b>Feature</b>	<b>Reason for non-support</b>
Query Prediction.	Uses Oracle's Cost Based Optimizer.
The Discoverer EUL V5 Workbooks - eul5.eex.	Uses Oracle's PL/SQL.
Register PL/SQL functions.	Uses Oracle's PL/SQL.
Summary folders where refresh is managed by Discoverer.	Uses Oracle's PL/SQL.
Database Roles.	Oracle RDBMS specific.
Parser Hints on Folders.	Oracle RDBMS specific.
Server side scheduled reporting.	Uses Oracle's PL/SQL.
Oracle analytic functions.	Oracle RDBMS specific.

## Which Discoverer features are partially supported by Oracle Rdb?

The following features are partially supported by Oracle Rdb:

**Table 23–2** *Features partially supported in Discoverer when using Rdb*

<b>Feature</b>	<b>Reason for non support</b>
Some functions:	Oracle RDBMS specific
▪ INSTR	
▪ INSTRB	
▪ VSIZE	
▪ UID	
▪ DUMP	
▪ TRANSLATE	
▪ SOUNDEX	
▪ STDDEV	
▪ VARIANCE	
▪ STDDEV_DISTINCT	
▪ VARIANCE_DISTINCT	
Security - Roles and Users	Not supported directly, needs to be set up by the Rdb administrator.

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## Discoverer support for non-Oracle databases using native ODBC drivers

Discoverer supports access to non-Oracle databases using native ODBC drivers (the ODBC drivers supplied by your database vendor).

Discoverer enables you to create an End User Layer on the non-Oracle database in an existing database user (i.e. Discoverer cannot create a new user on the non-Oracle database). Discoverer uses the security features of the non-Oracle database to control access to the EUL on the non-Oracle datasource and the data it defines.

The available functionality depends on the capabilities of both the non-Oracle database and its ODBC driver. Some Discoverer features are not supported or are only partially supported when you connect to a non-Oracle database using native ODBC drivers.

For information about the non-Oracle datasources tested with Discoverer, see the Release Notes.

This section includes the following topics:

- ["What are the software requirements for Discoverer to support non-Oracle databases using native ODBC drivers?"](#)
- ["Which Discoverer features are not supported by non-Oracle databases using native ODBC drivers?"](#)
- ["Which Discoverer features are only partially supported by non-Oracle databases using native ODBC drivers?"](#)
- ["Which Discoverer features are implemented differently by non-Oracle databases using native ODBC drivers?"](#)
- ["Why does Discoverer require a list of known database users?"](#)
- ["How to use Discoverer with non-Oracle databases using native ODBC drivers"](#)

### What are the software requirements for Discoverer to support non-Oracle databases using native ODBC drivers?

For Discoverer to support a non-Oracle database, you must install the ODBC driver supplied by the vendor of the non-Oracle database.

For more information about installing and configuring the ODBC driver, see the documentation supplied with the non-Oracle database.

## Which Discoverer features are not supported by non-Oracle databases using native ODBC drivers?

The following Discoverer features are not supported by non-Oracle databases using native ODBC drivers:

**Table 23–3 Features not supported in Discoverer when using non-Oracle databases and native ODBC drivers**

Feature	Reason for non-support
Database roles.	Oracle specific.
Collect query statistics.	Oracle specific.
Grant Workbook (the ability to grant access to workbooks to other users).	Oracle specific.
Query governor - Query prediction warning.	Oracle specific.
Non-ANSI standard database functions in calculations.	Oracle specific.
Scheduled workbooks.	Requires Oracle PL/SQL to submit jobs for batch execution.
Summary management.	Requires Oracle PL/SQL to perform management functions. <b>Note:</b> Summary folders managed by Discoverer are disabled. External summary folders can still be registered by the Discoverer manager and used in query execution (where appropriate).
Query prediction.	Requires Oracle specific database objects and functions.
Date Hierarchies.	Requires Oracle specific <code>DECODE ( )</code> syntax (non-ANSI standard).
Save workbooks to some databases.	May be restricted by size based on binary large object data type limits.
EUL Gateway.	Requires checkpoints for partial transaction rollback.
Identify and create a new users.	Oracle specific.

**Table 23–3 Features not supported in Discoverer when using non-Oracle databases and native ODBC drivers**

Feature	Reason for non-support
Some Discoverer Administrator commands:	Oracle specific.
<ul style="list-style-type: none"> <li>▪ /load</li> <li>▪ /refresh_bus_area</li> <li>▪ /refresh_folder</li> <li>▪ /refresh_summary</li> <li>▪ /db_link</li> <li>▪ /source</li> </ul>	
Some Desktop commands:	Oracle specific.
<ul style="list-style-type: none"> <li>▪ /opendb</li> <li>▪ /batch</li> </ul>	

## Which Discoverer features are only partially supported by non-Oracle databases using native ODBC drivers?

Some Discoverer features are only partially supported when you connect to a non-Oracle database using native ODBC drivers. Typically, the only disabled aspects of a feature are those aspects that the non-Oracle database (or its ODBC driver) cannot support.

The following Discoverer features are only partially supported when using Discoverer with non-Oracle databases and native ODBC drivers:

**Table 23–4 Discoverer features partially supported by non-Oracle databases when using native ODBC drivers**

Feature	Implementation restriction
EUL management	You can create an EUL on the non-Oracle database for the current database user or an existing database user. The facility to identify and create a new user is not available. Similarly, the tutorial data can only be created if the tutorial user has been created in advance

**Table 23–4 Discoverer features partially supported by non-Oracle databases when using native ODBC drivers**

Feature	Implementation restriction
Count all rows	The facility to return a count of all the rows to be returned by a query will not work for all possible queries. Oracle Discoverer creates a new query to return this count and makes use of more complex SQL (sometimes called an Inline View) to improve performance. As Inline View syntax is not supported by ODBC, it is necessary to "flatten" the SQL before it is sent to the non-Oracle database. If the query whose rows are being counted contains any aggregate functions, this process is not possible. In this case, a message is displayed explaining that a count is not available for the current query.
Creating items using the formula editor	Users can still create derived or complex items using the formula editor by combining items and constants with database functions. However, the available functions are only those functions or their equivalents available via ODBC on the non-Oracle database. For example: <ul style="list-style-type: none"><li>■ DECODE() is an Oracle specific function and is not available on ODBC</li><li>■ SYSDATE is replaced by the ODBC function NOW()</li></ul>

A number of non-Oracle databases escalate locks during intensive processes such as bulk load (for more information about bulk load, see [Chapter 3, "Creating and maintaining End User Layers"](#)). If you run multiple Discoverer Administrator sessions on the same database, processes might lock each other out. Therefore we recommend that you run only one Discoverer Administrator session at a time against a single EUL.

In the case of some non-Oracle databases, multiple databases can share common system objects. The individual databases are said to reside in the same datasources.

You can run multiple copies of Discoverer Administrator against different datasources (or different databases in the same datasource) with no locking contention providing system objects are unique to the individual databases.



## Which Discoverer features are implemented differently by non-Oracle databases using native ODBC drivers?

The following Discoverer features are implemented differently by non-Oracle databases using native ODBC drivers:

**Table 23–5 Discoverer features implemented differently by non-Oracle databases using native ODBC drivers**

Feature	Implementation difference
Folder validation error messages	<p>If you use Discoverer Administrator to validate folders on a non-Oracle database, any error messages will be governed by that non-Oracle database.</p> <p>For example, if an underlying object no longer exists:</p> <ul style="list-style-type: none"> <li>■ connection to an Oracle database displays the following message: ORA-00942 Table or view does not exist</li> <li>■ connection to a SQL Server database displays the following message: [Microsoft][ODBC SQL Server Driver][SQL Server]Invalid object name EMP</li> </ul> <p>The quality of the message depends on both the non-Oracle database and the ODBC driver</p>

## Why does Discoverer require a list of known database users?

Discoverer Administrator requires a list of known database users in order to perform many of its operations. However, some non-Oracle databases return only a list of users that own objects that the currently connected user can see. You can continue to use Discoverer Administrator in this restricted environment but some administrative functions will not be available. To make sure you have access to all the administrative functions, you can create a view on the non-Oracle database that returns more accurate user information (e.g. retrieves all database user names).

The view you create must:

- be created in the EUL owner database user
- be called EUL5\_ODBC\_SCHEMAS
- return a single column called (or aliased to) OS\_SCHEMA\_NAME
- be based on underlying objects that are accessible to all users

- return no duplicates
- only return users (i.e. not groups or aliases)

If you create the view on an Oracle database, the SQL is:

```
SQL> select username from all_users
```

If you create the view on a SQL Server database, the SQL is:

```
SQL> select name from sysusers where suid > 1 and uid <> gid
```

In this case, the first filter removes temporary user id's, while the second removes user groups.

Note that a suitable view is automatically created with an EUL for some non-Oracle databases. If the view was not automatically created, you must:

- create the view manually in the EUL owner database user alongside the standard EUL objects
- grant the same permissions on the view as on other read-only objects in the EUL (e.g. as for the table EUL5\_VERSIONS)

If you have more than one EUL in the database, you might have as many copies of this object as you have EULs.

## How to use Discoverer with non-Oracle databases using native ODBC drivers

You can use Discoverer with non-Oracle databases using native ODBC drivers by connecting in one of two ways:

- using the Connect dialog

Type the following in the **Connect** field on the Connect dialog:

```
ODBC:<dbname>
```

For example:

```
ODBC:sqldb1
```

- using the command line interface

To start Discoverer Administrator using the command line interface, type the following at the command prompt:

```
dis5adm.exe /connect <username/password>@ODBC:<dbname>
```

For example:

```
dis5adm.exe /connect jchan/jchan@ODBC:sqlldb1
```

In both cases, <dbname> is the name of the non-Oracle database defined in the ODBC Data Source Administrator (in the Windows Control Panel program group).

## Discoverer support for non-Oracle databases using generic connectivity

Discoverer fully leverages the Oracle8i database generic connectivity feature. For more information about this feature, see the *Oracle9i Heterogeneous Connectivity Administrator's Guide*.

This section includes the following topics:

- ["What is generic connectivity?"](#)
- ["How to set up generic connectivity"](#)
- ["What are the advantages of using generic connectivity?"](#)

### What is generic connectivity?

Generic connectivity is the ability of the Oracle database to provide users with access to ODBC or OLE DB (object linking and embedding database) databases. You can use the Oracle database's generic connectivity feature to connect to non-Oracle databases with Oracle Discoverer. The databases must comply sufficiently with the ODBC standard (for more information about ODBC and OLE DB connectivity requirements, see the *Oracle9i Heterogeneous Connectivity Administrator's Guide*).

For Discoverer, the major difference between using the Oracle database generic connectivity feature and using ODBC drivers to connect to a non-Oracle database is as follows:

- with generic connectivity, the EUL is stored in the Oracle database
- with ODBC drivers the EUL is stored in the non-Oracle database

### How to set up generic connectivity

For more information about how to set up generic connectivity, see the *Oracle9i Heterogeneous Connectivity Administrator's Guide*.

## What are the advantages of using generic connectivity?

Using Discoverer with the Oracle database's generic connectivity feature rather than the native ODBC drivers when connecting to a non-Oracle database, has the following advantages:

- enables connections to a greater number of ODBC databases  
Generic connectivity provides access to any ODBC database that is compliant with the ODBC standard. Compliance varies with both databases and ODBC drivers.
- enables Discoverer end users to query data from multiple different databases simultaneously  
For example, you can create a single business area with folders based on tables held in Sybase, DB2 and Oracle databases. An end user query can return data joined across multiple databases.
- enables query prediction on non-Oracle databases  
Discoverer's query prediction uses query statistics that are generated when end users run queries and which are saved in the EUL. Because the EUL is in the Oracle database, Discoverer is able to carry out query prediction with ODBC data.
- enables batch support for scheduling workbooks  
Discoverer uses the batch scheduler in the Oracle database. Because the EUL is in the Oracle database, Discoverer is able to schedule workbooks with ODBC data.
- enables you to apply Oracle analytical functions (and other Oracle functions) to data provided from an ODBC database  
The data is brought into the Oracle database and the function is applied. This enables access to very powerful analytical functions against ODBC data.

## Discoverer support for non-Oracle databases using the Transparent Gateway

In addition to generic connectivity and native ODBC drivers, you can also use the Transparent Gateway with Oracle databases to provide Discoverer users with access to ODBC and OLE DB databases. The databases must comply with the ODBC standard (for more information about the Transparent Gateway and how to set it up, see the Discoverer Release Notes).

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## Upgrading to Discoverer Version 9.0.2

### Upgrading to Discoverer Version 9.0.2

This chapter explains how to upgrade to Discoverer Version 9.0.2, and includes the following topics:

- "Upgrading to Discoverer Version 9.0.2"
- "About upgrading to Discoverer Version 9.0.2"
- "What are the prerequisites for upgrading to Discoverer Version 9.0.2?"
- "Upgrade step 1: Back up the Release 4.1 EUL"
- "Upgrade step 2: Upgrade the Release 4.1 EUL"
- "Upgrade step 3: Refresh summary folders"
- "Upgrade step 4: Migrate users to Discoverer Version 9.0.2"
- "Upgrade step 5: Remove the Release 4.1 EULs"
- "Upgrade step 6: Remove Discoverer Release 4.1 products from client machines"
- "Notes about upgrading EULs that contain analytic functions"

### About upgrading to Discoverer Version 9.0.2

To use Discoverer Version 9.0.2, Discoverer users must have access to a Discoverer Version 5.1 End User Layer (EUL). If users have access to a Discoverer Release 4.1 EUL, that EUL must be upgraded before the users can access it using Discoverer Version 9.0.2.

The EUL upgrade process creates new Version 5.1 EUL tables, and then copies data from the Release 4.1 EUL tables into the new tables. Existing users can continue

working with Discoverer Release 4.1 during the upgrade process because the upgrade process is non-destructive (i.e. the Release 4.1 EUL tables are not deleted).

For each EUL you want to upgrade, follow the upgrade steps below:

- ["Upgrade step 1: Back up the Release 4.1 EUL"](#)
- ["Upgrade step 2: Upgrade the Release 4.1 EUL"](#)
- ["Upgrade step 3: Refresh summary folders"](#)

When you are satisfied that all Release 4.1 EULs have been successfully upgraded, follow the upgrade steps below:

- ["Upgrade step 4: Migrate users to Discoverer Version 9.0.2"](#)
- ["Upgrade step 5: Remove the Release 4.1 EULs"](#)

When you have upgraded all users and removed all Release 4.1 EULs, follow the upgrade step below:

- ["Upgrade step 6: Remove Discoverer Release 4.1 products from client machines"](#)

## What are the prerequisites for upgrading to Discoverer Version 9.0.2?

Before you can upgrade to Discoverer Version 9.0.2, Oracle9i Developer Suite Release 2 (including Discoverer Version 9.0.2) must already be installed.

In addition, to upgrade End User Layers, the EUL owners must have the following privileges:

- CREATE PROCEDURE
- CREATE SESSION
- CREATE TABLE
- CREATE VIEW
- CREATE SEQUENCE

If upgrading to an Oracle 8.1.6 (or above) database, summaries are implemented as materialized views and the EUL owners therefore require the following privileges:

- CREATE ANY MATERIALIZED VIEW
- DROP ANY MATERIALIZED VIEW
- ALTER ANY MATERIALIZED VIEW
- GLOBAL QUERY REWRITE

**Important:** To maintain the consistency of data transferred to the Version 5.1 EUL, it is very important that no Discoverer Administrator sessions are opened on the Release 4.1 EUL while the upgrade is in progress

## Upgrade step 1: Back up the Release 4.1 EUL

Before you can upgrade an EUL to Discoverer Version 9.0.2, you must first back up the EUL tables by exporting the EUL owner using the standard database export utility.

How to export the EUL owner will depend on:

- the version of the Oracle client software installed on your machine
- the version of the Oracle database on which the Release 4.1 EUL resides

We recommend that the version of the Oracle database and the version of the Oracle database client software installed on your machine are the same. If the versions are not the same (e.g. if the EUL is on an Oracle8*i* database and Oracle9*i* client software is installed on your machine), you might not be able to follow the instructions below. If you are unable to export the EUL, contact your database administrator and ask them to export the EUL for you.

To back up a Release 4.1 EUL (assuming the EUL resides on an Oracle9*i* database and you are using a machine on which you have installed Oracle9*i*DS), follow the steps described in [Chapter 3, "How to export an EUL using the standard database export utility"](#) and [Chapter 3, "How to import an EUL using the standard database import utility"](#).

Having backed up the Release 4.1 EUL, you are now ready to upgrade it to Version 5.1.

## Upgrade step 2: Upgrade the Release 4.1 EUL

Having backed up a Release 4.1 EUL, you can now upgrade the EUL to Version 5.1. The same database user that owned the Release 4.1 EUL will own the Version 5.1 EUL.

Note that Release 4.1 users are not affected by the upgrade and can continue using the Release 4.1 EUL.

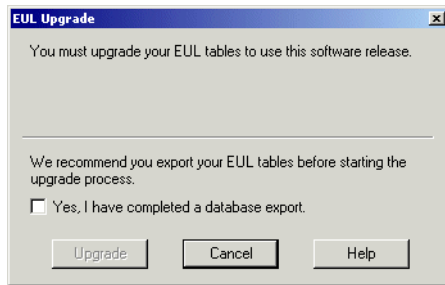
**Important:** To maintain the consistency of data transferred to the Version 5.1 EUL, it is very important that no Discoverer Administrator sessions are opened on the Release 4.1 EUL while the upgrade is in progress.

To upgrade a Release 4.1 EUL to Version 5.1:

1. Choose Programs | Oracle Discoverer | Oracle9i Discoverer Administrator from the Windows Start menu to display the Connect dialog.
2. Enter the database user name and password of the owner of the Discoverer Release 4.1 EUL that you want to upgrade.
3. Click OK.

The EUL Upgrade dialog is displayed.

**Figure 24–1 EUL Upgrade dialog**



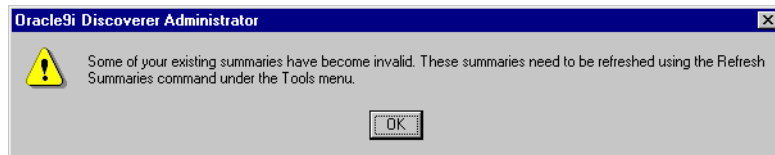
**Note:** If you have not already exported the Release 4.1 EUL, click Cancel and export the EUL (for more information, see "[Upgrade step 1: Back up the Release 4.1 EUL](#)").

4. Select the **Yes, I have completed a database export** check box to confirm that you have exported the Discoverer Release 4.1 EUL.
5. Click Upgrade to create a new Version 5.1 EUL using data copied from the Release 4.1 EUL.

The EUL Upgrade progress bar displays the status of the upgrade.

If there are summary folders in the upgraded EUL, the following message dialog is displayed, indicating that the summary folders are invalid and must be refreshed.



**Figure 24–2 Invalid summaries warning message dialog**

6. If the above message dialog is displayed, click OK.  
The Load Wizard is displayed.
7. Click Cancel to close the Load Wizard.  
The EUL upgrade is complete. You can use this EUL to connect to the database using Discoverer Administrator Version 9.0.2.

## Upgrade step 3: Refresh summary folders

If there are summary folders in the EUL you have upgraded, you must refresh the summary folders.

The definitions of any Release 4.1 summary folders are copied into the new Version 5.1 EUL and the status of any upgraded summary folders is changed to “Refresh Required”. The database tables or materialized views on which the upgraded summary folders are based are not actually created until the summary folders are refreshed.

When you refresh upgraded summary folders:

- on Oracle 8.1.5 (or earlier) databases, Discoverer creates summary tables
- on Oracle 8.1.6 (or later) databases, Discoverer creates materialized views

When the summary tables or materialized views have been created, Discoverer can then use the summary folders to optimize queries.

For more information about summary folders, summary tables, and materialized views, see the [Chapter 14, "Managing summary folders"](#).

To refresh upgraded summary folders:

1. Connect to Discoverer Administrator as the owner of the upgraded EUL.
2. Open the business area containing the summary folders that you want to refresh.

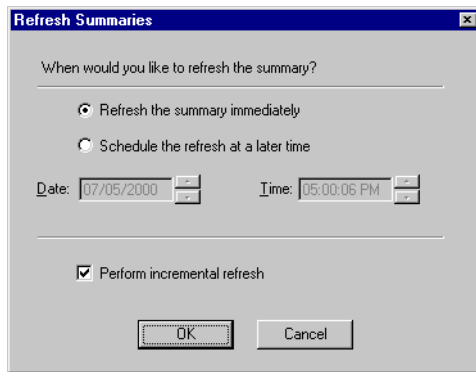
3. Display the Summaries tab of the Workarea.
4. Select the summary folders that you want to refresh.

You will have to refresh all of the summary folders before Discoverer can use them. However, depending on the amount of data, you might not want to refresh all the summary folders at the same time.

5. Select Tools | Refresh Summaries.

For any summary folders not based on external summary tables, the Refresh Summaries dialog is displayed.

**Figure 24–3 Refresh Summaries dialog**



6. Specify refresh options as required.

You can refresh summary folders immediately or specify a time for the refresh. Depending on the amount of data, you might want to schedule the refresh for an off-peak time.

7. Click OK to refresh the summary folders.

### Notes

If an upgraded EUL contains summary folders based on external summary tables, you must also refresh those summary folders. During the refresh, Discoverer updates EUL metadata for summary folders based on external summary tables. If you are using Oracle 8.1.6 (or later), Discoverer creates a materialized view that references the external summary table.

## Upgrade step 4: Migrate users to Discoverer Version 9.0.2

When you have upgraded all Release 4.1 EULs and you are satisfied that the upgraded EULs are ready for use, migrate Discoverer users to Discoverer Version 9.0.2.

While you are rolling out the migration across the organization, users can continue to work in either Release 4.1 or Version 9.0.2. However, note that any changes you make using one version of Discoverer Administrator will not be available to users of the other version of Discoverer.

How to migrate Discoverer users to Discoverer Version 9.0.2 will depend on the Discoverer tools they use.

To migrate Discoverer Plus and Discoverer Viewer users

1. Install Oracle9iAS Discoverer Release 2 (version 9.0.2).
2. Follow the instructions in the *Oracle9iAS Migration Guide* to upgrade the Discoverer components on the middle tier

To migrate Discoverer Desktop users:

1. Install Discoverer Desktop on client machines using the Discoverer Desktop CD supplied with Oracle9i Developer Suite.

The Oracle Installer automatically installs Discoverer Desktop Version 9.0.2 in a separate directory from Discoverer Release 4.1

### Notes

When a user logs into Discoverer for the first time, Discoverer searches for any Version 5.1 EULs that the user has access to, as follows:

- If a valid EUL is found, the user can connect and can start work in Discoverer Version 9.0.2.
- If no valid EUL is found, Discoverer alerts the user that they cannot connect to the database. At this point, the user must contact their Discoverer manager because it is likely that an EUL has not yet been upgraded. Note that the user can still use Discoverer Release 4.1 against an existing Release 4.1 EUL.

After Discoverer Version 9.0.2 is installed and a connection to the database has been established successfully through a Version 5.1 EUL, you can remove:

- Discoverer Release 4.1 EULs from the database

- Discoverer Release 4.1 products (i.e. Discoverer Desktop Edition, Discoverer Administration Edition) from client machines

## Upgrade step 5: Remove the Release 4.1 EULs

When you have upgraded all users to Discoverer Version 9.0.2 and they are successfully connecting to the database through upgraded Version 5.1 EULs, you can remove the Release 4.1 EULs.

A SQL script called `eul4del.sql` is shipped with Discoverer that enables you to remove Release 4.1 EULs and associated tables (including summary tables/materialized views).

Note the following:

- When you run the `eul4del.sql` script, you are prompted for the password of the SYSTEM user. If you are not sure of the password of the SYSTEM user, contact your database administrator. Rather than give you the SYSTEM user's password, your database administrator might prefer to run the script for you.
- The `eul4del.sql` script will not complete successfully if there are any summary folders owned by users other than the EUL owner. The script will list any such summary folders and their owners. The summary folder owners must delete their summary folders before you can remove the Release 4.1 EUL.

To remove a Release 4.1 EUL:

1. Choose ORACLE9i | Application Development | SQL\*Plus from the Windows Start menu to display the SQL\*Plus Log On dialog.
2. Enter the database user name, password and database for the owner of the Discoverer Release 4.1 EUL that you want to remove.
3. Type the following at the command prompt to start the Release 4.1 EUL deinstallation script:

```
SQL>@<ORACLE_HOME>\discv902\sql\eul4del.sql
```

The deinstallation script removes a specified Release 4.1 EUL and any associated database objects, including summary tables/materialized views.

A summary of the deinstallation script is displayed:

```
Removing summary refresh jobs ...
Discoverer End User Layer Database Tables (4.x Production)
deinstallation
This script will remove a version 4.x EUL and any associated database
```

objects.

It will:

1. Ask you to enter the ORACLE SYSTEM password and connect string.
2. Ask you to enter the name and password of the 4.x EUL owner.
3. Confirm that you wish to drop the 4.x EUL.
4. Check for database jobs for users other than the 4.x EUL owner.
5. Confirm whether to drop 4.x tutorial tables (if any).
6. Log in as the 4.x EUL owner and remove any database jobs for it.
7. Remove all summary database objects for the 4.x EUL.
8. Remove all scheduled workbook database objects for the 4.x EUL.
9. Remove the 4.x EUL tables.
10. Remove user and public synonyms (if any) for the 4.x EUL tables.

4. When prompted, enter the password and database connect string for the SYSTEM user.

If you are not sure of the password of the SYSTEM user, contact your database administrator.

5. Enter the name and password of the owner of the Release 4.1 EUL.

The following text is displayed:

```
Preparing to remove EUL 4.x owned by <username> at <today's date>
If you continue, the specified 4.x End User Layer will be PERMANENTLY
dropped. All End User Layer information and workbooks stored in the
database will be deleted.
Any 5.1 End User Layer tables will NOT be affected by this process.
THIS PROCESS IS NON-REVERSIBLE.
Do you wish to continue [N]:
```

Note that the EUL removal process is not reversible.

6. Type Y to confirm that you want to drop the Release 4.1 EUL.

If the script detects the Release 4.1 tutorial tables, you are prompted to confirm whether to delete the tables.

During the process of dropping the Release 4.1 EUL, the script will check whether there are any summary folders owned by users other than the EUL owner.

- If there are no summary folders owned by other users, then the Release 4.1 EUL is dropped. You will see a number of messages showing the various stages of the drop process, as follows:

```
Removing summary refresh jobs ...
```

```
Dropping internally managed summary data ...
Removing scheduled workbook jobs ...
Dropping scheduled workbook data ...
Dropping 4.x End User Layer Tables ...
Removing public synonyms (if any) ...
Connected.
```

Finished removing 4.x End User Layer.

- If there are summary folders owned by users other than the EUL owner, the script will halt and display the following text:

```
The following users have managed summaries which must be dropped
before this EUL can be deinstalled:
User: SCOTT, Summary: Scott's Summary
User: FRED, Summary: Fred's Summary
etc.
Quitting - no changes made.
```

If this message appears, the specified users must log into Discoverer Administration Edition Release 4.1 and remove the specified summary folders (for more information, see the [Chapter 15, "How to delete summary folders"](#)). Once these summary folders have been dropped, rerun the script `eul4del.sql` in order to drop the Release 4.1 EUL.

## Upgrade step 6: Remove Discoverer Release 4.1 products from client machines

When you and your users have connected successfully to Discoverer Version 9.0.2 and you are confident that summary folders are working correctly, you can remove Discoverer Release 4.1 products (i.e. Discoverer Administration Edition, Discoverer Desktop Edition) from client machines.

To remove Discoverer Release 4.1 products from client machines:

1. Insert the CD from which you installed Discoverer Release 4.1 products into your computer.

The Oracle Installer starts automatically. If the Installer does not start automatically, access the CD-ROM with Windows Explorer and run `setup.exe` from the CD root directory.

2. Use the Oracle Installer dialogs to remove Discoverer Release 4.1 products.

Note that any workbooks created in Discoverer Release 4.1 and saved in the <ORACLE\_HOME>\discvr4 directory will not be deleted.

3. (optional) To retain workbooks from the <ORACLE\_HOME>\discvr4 directory for future use:
  - a. Move any Discoverer Release 4.1 workbooks from the <ORACLE\_HOME>\discvr4 directory to a new directory for use with Discoverer Version 9.0.2.
  - b. Delete the \discvr4 folder.

## Notes about upgrading to Discoverer version 9.0.2

### Notes about upgrading Oracle Applications EULs

When upgrading an Oracle Applications EUL, be aware that the MAXEXTENTS storage property of the EUL tables might have been increased to a value greater than the MAXEXTENTS storage property of the tablespace in which the EUL was created. If this situation exists, any attempt to upgrade the EUL will fail (e.g. with an ORA01631 error) because:

- the upgrade process uses the original EUL tablespace's MAXEXTENTS value when creating the new EUL tables
- the new EUL tables will therefore not be large enough to contain the data from the original EUL tables

If the MAXEXTENTS value of the EUL tables is greater than the MAXEXTENTS value of the EUL's tablespace, ask your database administrator to increase the MAXEXTENTS value of the original EUL's tablespace before attempting to upgrade the EUL. The new EUL tablespace and the new EUL tables will be created with the larger MAXEXTENTS value.

### Notes about upgrading EULs that contain analytic functions

When you upgrade an EUL to this version of Discoverer, new Oracle9i analytic functions are added to EUL tables.

Where existing user-defined functions have the same name (or the same unique identifier) as the new functions, Discoverer does the following:

- renames the existing user-defined function
- displays a log message at the end of the upgrade process

- gives you the option to save the messages to a log file

**Note:** Discoverer's internal reference system ensures that Discoverer end users can still open workbooks that contain renamed user-defined functions.



# Part II

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## Reference information

This section of the Oracle Discoverer Administrator Administration Guide contains general reference information including descriptions of all Discoverer Administrator dialogs.



### Reference dialogs

This chapter contains comprehensive reference information for each dialog in Discoverer Administrator.

### List of reference dialogs

This section contains an alphabetical list of links to the reference dialogs used in Discoverer Administrator.

- ["Add Combinations of Items dialog"](#)
- ["Add Items to Summary Folder dialog"](#)
- ["Additional information about summary folders"](#)
- ["Alphabetical Sort dialog"](#)
- ["Business Area Properties dialog"](#)
- ["Changing Identifier Warning dialog"](#)
- ["Choose Folder dialog \(Item, Condition, Join\)"](#)
- ["Choose user or table/view dialog"](#)
- ["Condition Properties dialog"](#)
- ["Confirm Business Area Delete dialog"](#)
- ["Confirm Delete dialog"](#)
- ["Confirm Folder Delete dialog"](#)
- ["Connect dialog"](#)

"Create EUL Wizard dialog"  
"Create EUL Wizard: Step 2 dialog"  
"Create EUL Wizard: Step 2 dialog (Oracle Applications users)"  
"Custom Folder dialog"  
"Custom Folder Properties dialog"  
"Database Information dialog"  
"Database Storage Properties dialog: List of tabs"  
"Database Storage Properties dialog: 8i Properties tab"  
"Database Storage Properties dialog: Mappings tab"  
"Database Storage Properties dialog: Properties tab"  
"Database Storage Properties dialog: Tablespaces tab"  
"Date formats dialog"  
"Delete EUL dialog"  
"Edit Calculation dialog"  
"EUL Manager dialog"  
"EUL Upgrade Error dialog"  
"EUL Upgrade dialog"  
"Export Wizard Step 1 dialog"  
"Export Wizard: Step 2 dialog (selected business areas)"  
"Export Wizard Step 2 dialog (choose objects)"  
"Export Wizard dialog - final step - save file"  
"Folder Properties dialog"  
"Hierarchy Wizard dialog"  
"Impact dialog"  
"Import PL/SQL Functions dialog"  
"Import Wizard: Step 1 dialog"  
"Import Wizard: Step 2 dialog"  
"Import Wizard: Step 3 dialog"

"Install/Uninstall Tutorial Wizard Step 1 dialog"  
"Install/Uninstall Tutorial Wizard Step 2 dialog"  
"Install Tutorial Wizard Step 3 dialog"  
"Introducing Oracle9i Discoverer Administrator"  
"Item Class Wizard dialog"  
"Item Class Wizard: Choose Attributes dialog"  
"Item Class Wizard: Advanced options for list of values dialog"  
"Items that use date hierarchy dialog"  
"Item Class Wizard: Select Item dialog (if you chose alternative sort)"  
"Item Class Wizard: Select Item dialog (on which to base LOV)"  
"Item Properties dialog"  
"Join Options dialog"  
"Join Properties dialog"  
"Load Wizard: Step 1 dialog"  
"Load Wizard: Step 2 dialog"  
"Load Wizard: Step 3 dialog"  
"Load Wizard: Step 4 dialog"  
"Load Wizard: Step 5 dialog"  
"Manage Folders dialog: Business Area > Folder tab"  
"Manage Folders dialog: Folder > Business Area tab"  
"Manage Scheduled Workbooks dialog"  
"Name hierarchy dialog"  
"Name Summary Folder dialog"  
"New Condition dialog (Advanced)"  
"New Condition dialog (Choose object for)"  
"New/Edit Condition dialog"  
"New Date Format dialog"  
"New Item dialog (Choose Folder for Item)"

"New Item dialog"  
"New Join dialog (Choose folder)"  
"New Join/Edit Join dialog"  
"New Multi-Item Join dialog"  
"Online Dictionary Options dialog"  
"Open Business Area dialog"  
"Options dialog: Connection tab"  
"Options dialog: Default EUL tab"  
"PL/SQL Functions dialog: Arguments tab"  
"PL/SQL Functions dialog: Functions tab"  
"Privileges dialog: Privileges tab"  
"Privileges dialog: Query Governor tab"  
"Privileges dialog: Scheduled Workbooks tab"  
"Privileges dialog: User/Role tab"  
"Properties dialogs"  
"Refresh Business Area dialog"  
"Refresh Summaries dialog"  
"Refresh Summary Folder dialog"  
"Refresh Wizard dialog"  
"Repository Users dialog"  
"Responsibilities dialog"  
"Schedule Workbooks dialog: General tab"  
"Schedule Workbook dialog: Schedule tab"  
"Security dialog: Business Area - > User tab"  
"Security dialog: Users - > Business Area tab"  
"Select Default EUL dialog"  
"Select items to include in this hierarchy dialog"  
"Summary Properties dialog"

"Summary Wizard (ASM): Change default settings: List of dialog tabs"  
"Summary Wizard (ASM): Change default settings dialog: Analyze tab"  
"Summary Wizard (ASM): Change default settings dialog: Deletion tab"  
"Summary Wizard (ASM): Change default settings dialog: Folders tab"  
"Summary Wizard (ASM): Change default settings dialog: Query Usage tab"  
"Summary Wizard (ASM): Change default settings dialog: Query User tab"  
"Summary Wizard (ASM): Not Analyzed dialog"  
"Summary Wizard (ASM): Recommended Summaries dialog"  
"Summary Wizard (ASM): Step 3 Allocate Space dialog"  
"Summary Wizard: Step 1 dialog"  
"Summary Wizard: Step 2 dialog"  
"Use Query Statistics dialog"  
"Summary Status"  
"Summary Wizard (ASM): List of dialogs"  
"Using External Tables dialog"  
"Using Help"  
"Values dialog"  
"Workarea: Data tab"  
"Workarea: Hierarchies tab"  
"Workarea: Item Classes tab"  
"Workarea: Summaries tab"

## Add Combinations of Items dialog

Use this dialog to specify when you want a summary to be used.

This dialog is also displayed as:

Summary Wizard: Step 4

Summary Wizard: Step 5

Edit Summary dialog: Combinations tab

For more information, see:

["What are summary combinations?"](#)

["What to consider when defining summary combinations?"](#)

["Guidelines for setting up summary combinations"](#)

For example, you create a manual summary on two items: Product Key and Product Type. You might want the summary to be used for any query using both items together, or any of the items individually, as follows:

- Product Key and Product Type
- Product Key
- Product Type

In this instance, you create three combinations and select the check box next to the items that you want to use as follows:

**Table 25–1 Summary combinations**

Combinations	Combination 1	Combination 2	Combination 3
Product Key	Ticked	Ticked	Not ticked
Product Type	Ticked	Not ticked	Ticked



If you want to use the summary only when the Product Key and Product Type items are used together, you use the default combination only:

**Table 25–2 Summary combinations**

Combinations	Combination 1
Product Key	Ticked
Product Type	Ticked

### **Add combinations of items to this summary folder by clicking "Add Summary Combination" and clicking the desired items**

You need to choose the summary combinations that are to be pre-built and managed by the End User Layer. Each combination (essentially the queries and reports available to the end user) should reflect the type of analysis the user will want. The Summary Wizard displays one vertical row for each possible combination of axis items and summary folders.

In each row, click the check box for each axis item and combination to create a specific summary table for that choice. The End User Layer will always build that data for that table and have the information ready when an end user selects that particular query.

### **Add Combination**

Adds a new summary combination row.

### **Remove Combination**

Deletes the selected summary combination row.

### **Estimate Space**

Displays an estimate of database space required to store the summary combination you created.

### **Properties**

Allows you to view and edit database storage properties for the selected combination.

### **Status**

The status field displays the status (for more information, see "[Summary Status](#)") and any database error message for a selected combination. If the summary table

for this combination did not get built, the error message returned by the server appears here.

## Add Items to Summary Folder dialog

Use this dialog to select which items to add to a summary folder.

This dialog is also displayed as:

Summary Wizard: Step 3

Summary Wizard: Step 4

Edit Summary dialog: Choose items tab

For more information, see:

["What are summary folders?"](#)

### Available items

Use this field to select which items to add to the summary. Select one or more items, then click '>' to move them to the Selected items field.

### Selected items

This field contains items selected for the summary.

### Notes

You may select any axis items and math functions, but if the items are from different tables, a join must exist between the tables.

## Alphabetical Sort dialog

Discoverer displays this warning dialog when you attempt to sort:

- folders within a business area
- items within a folder.

For more information about folders and items, see:

["What are folders?"](#)

["What are items?"](#)

**n Folders/Items will be alphabetically sorted. The existing order will be lost.**

The above message displays the number of folders or items (n) that will be alphabetically sorted and also indicates that the existing display order will be lost if you click the Yes button.

**Do you want to continue?**

**Don't show this dialog again**

Select this check box to disable further display of this warning during the current session.

**Yes**

Click Yes to proceed. Discoverer will sort the folders/items.

**No**

Click No to abandon the alphabetical sort. Discoverer will return you to the Workarea.

## Business Area Properties dialog

Use this dialog to look at or change the properties of a business area. For example, to change a business area name, description, or identifier.

For more information, see:

["What are business areas?"](#)

The dialog has two tabs: General and Dependents. Click each tab to review and edit properties.

### General tab

The General tab contains three fields:

- Name  
Identifies the business area name.
- Description  
Text description of the business area.  
The contents of this field are displayed on the description line of the Discoverer Plus Query Wizard.
- Identifier  
A unique name that Discoverer uses to identify EUL and workbook objects.  
When matching objects common to different EULs, Discoverer uses Identifiers to locate the objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

### Dependents tab

**Note:** Dependents do not apply at the business area level.

## Changing Identifier Warning dialog

This dialog is displayed when you attempt to save changes to an item's identifier, to warn you of the implications of changing an identifier.

Identifiers are unique names that Discoverer uses to identify EUL and Workbook objects (e.g. business areas, folders, items, worksheets, parameters, joins, conditions, calculations). For example a folder named Sales in EUL 'A' may refer to the same business object to which the folder Sales Figures in EUL 'B' refers. Both folders have the same Identifier and can therefore be recognized as being the same object.

In most cases it is advisable not to alter an Identifier.

Some examples of why you might want to change an identifier are as follows:

- to comply with strict naming conventions
- where an object has been deleted and needs to be recreated with the same Identifier

If you do change an identifier, then matching identifiers in other EULs should also be updated to reflect the change.

### **Are you sure you want to proceed?**

#### **Yes**

Click Yes to proceed. This enables you to make changes to the identifier.

#### **No**

Click No to abandon. This will return you to the Properties dialog.

### **Don't show this warning again during this session**

Select the this check box to disable display of this warning during a session.

## Choose Folder dialog (Item, Condition, Join)

Use this dialog to select a folder in which to store new items, conditions, or joins. Discoverer might display the Choose Folder dialog in any of the following cases:

- the currently selected folder does not use the condition you are about to create
- a folder is not selected on the Join Manager dialog and you click Change folder in the drop down list

This dialog is also displayed as:

New Join dialog

For more information, see:

["What are folders?"](#)

["What are items?"](#)

["What are joins?"](#)

["What are conditions?"](#)

### **Business area**

Use this drop down list to select a business area. Then, choose a folder from the expandable item list below.

## Condition Properties dialog

Use this dialog to look at or change the properties of a condition.

For more information, see:

["What are conditions?"](#)

### **Name**

Use this field to enter a descriptive condition name. This name appears in condition lists, and on Discoverer worksheets.

### **Description**

Use this field to enter a brief description for the condition. This description is displayed in condition lists to help Discoverer users choose which condition they want to use.

### **Type**

Use this drop down list to specify the condition as Mandatory and Optional.

- Mandatory conditions always applies to a folder. The Discoverer end user does not see the condition in Discoverer Plus and cannot turn it off.
- Optional conditions can be applied or not applied. This offers Discoverer end users the choice to turn the condition on or off in Discoverer Plus.

### **Sequence**

Order in which this item appears in Discoverer Plus's Object Selection wizard. For example, you may want to display all conditions before items.

### **Formula**

The formula that defines the condition. This displays the ["Edit Condition dialog"](#). See the Oracle Server SQL Language Reference Manual for valid server syntax.

### **Identifier**

A unique name that Discoverer uses to identify EUL and workbook objects. When matching objects common to different EULs, Discoverer uses Identifiers to locate objects in different EULs that refer to the same business objects (also known as



Conceptually Identical Objects). For more information, see [Chapter 3, "What are identifiers?"](#).

The Dependents tab displays two columns (Type and Name) that clarify the extent to which other objects (e.g. folders, joins, items, item classes, summary folders, conditions, calculations) are dependent on the selected condition.

**Type**

Displays one or more object types (e.g. folders, items) that have a dependency on the selected condition.

**Name**

Displays the name of each object listed in the Type column

**Notes**

Where more than one condition is selected, if you choose the Properties option then any changes made to a property will affect all the selected conditions.

## Choose user or table/view dialog

Use this dialog to choose the database user or the table or view that you want to use for the current object. For example when:

- choosing a database user as the Owner of a folder (for further information, see ["Folder Properties dialog"](#))
- selecting a table or view when creating an external summary folder (for further information, see [Chapter 15, "How to create summary folders based on external summary tables"](#)).

This dialog is also displayed as:

Choose User dialog

For more information, see:

["What are folders?"](#)

["What is manual summary folder creation?"](#)

### Database

Use the drop down list to select the database that contains the required user or table/view.

Use the list to select the user or table/view that you want.

## Confirm Business Area Delete dialog

Use this dialog to manage how you delete a business area. For example, to check the impact of removing a business area before doing so.

For more information, see:

["What are business areas?"](#)

### **Delete this Business Area**

Removes only the business area itself, but does not delete the contents of the business area.

### **Delete this Business Area and its Folders**

Removes the business area and all of the folders contained in this business area. This does not remove folders that are part of any other business area.

### **Yes**

Click to delete the selected business area.

### **No**

Click to cancel the action, and close this dialog box. There will be no change to the business area or End User Layer.

### **Impact**

Use this button display the ["Impact dialog"](#). The Impact dialog displays a list of all objects that will be affected or removed if you delete the selected business area.

### **Hint**

Folders that have no business area become orphan folders. These folders still exist in the EUL, but are no longer visible in the work area. You can control orphan folders using the Manage Folders command from the Tools menu.

## Confirm Delete dialog

Use this dialog to manage how you delete an item. For example, to check the impact of removing an item before doing so.

### **Yes**

Deletes the selected item from the business area.

### **No**

Cancels the action, closes the dialog, and does not change the business area.

### **Impact**

Use this button display the "[Impact dialog](#)". The Impact dialog displays a list of all objects that will be affected or removed if you delete the selected item.

## Confirm Folder Delete dialog

Use this dialog to manage how you delete a folder. For example, to check the impact of removing a folder before doing so.

For more information, see:

["What are folders?"](#)

### **Delete from this Business Area**

Use this radio button to remove the selected folder from the current business area, but not delete the folder from the End User Layer. This means that you can still use this folder in other business areas.

### **Delete from the End User Layer**

Use this radio button to remove the selected folder from the business area and from the End User Layer. You will no longer be able to use this folder in this or any other business area in the EUL.

### **Impact**

Use this button display the ["Impact dialog"](#). The Impact dialog displays a list of all objects that will be affected or removed if you delete the selected folder.

### **Notes**

A folder removed from the business area but not the EUL, and which is not referenced in any other business area is known as an orphan folder.

## Create EUL Wizard dialog

Use this wizard to help you create an End User Layer (EUL). Here, you define who will own the new EUL.

For more information, see:

["What is an End User Layer?"](#)

### Who will own the EUL?

#### Select an existing user

Use this radio button to create an EUL for a user that already exists in the current database. This new EUL replaces any existing EUL for that user. Select the user from the User drop down list.

#### Create a new user

Use this radio button to create a new user in the database and an EUL for that user. You must have sufficient database privileges to create a new user.

#### Grant access to public

Use this check box to make this EUL accessible to all users in the current database. If you do not select this option, only the user who owns the EUL will be able to access data through this EUL.

#### New EUL is for use by Oracle Applications users ONLY

Use this check box if you want the EUL to be restricted to Oracle Applications users. Clear this check box if you want to create a standard EUL.

### Enter the EUL user's password

#### User

- If you selected the Select an existing user radio button, use this drop down list to select the existing user's name (userid), or enter a new user's name. If this new EUL is for the current user, you do not have to enter a password.
- If you selected the Create a new user radio button, use this field to enter the new user's name (userid),

**Password**

Use this field to enter the password for the user, or enter a new password for a new user. This field is disabled if the new EUL is owned by the current user.

**Confirm password**

Use this field to re-enter the password for the user. If you are creating this EUL for an existing user, you do not have to confirm the password. This field is unavailable if the new EUL is owned by the current user.

## Connect dialog

Use the Connect dialog to connect to a different End User Layer. This dialog also appears when you first run Discoverer Administrator. You cannot work in Discoverer Administrator unless you are connected to an EUL.

### Notes:

When you connect to Oracle Applications EULs, the Connect dialog prompts you to enter your Oracle Applications connect details, (see the Status area in the Connect dialog). If Discoverer is not configured to use Oracle Applications EULs, you need to reconfigure your Connect dialog. Choose File | Options to configure Discoverer to connect to Oracle Applications EULs.

For more information, see:

["Differences with the Discoverer Connect dialog in Oracle Applications mode"](#)

### Username

Use this field to enter your authorized database user name.

### Password

Use this field to enter authorized database password to match the user name.

### Connect

Use this field to enter the name of the database that you are connecting to.

**Note:** To connect to the local database (on your hard drive), leave this field empty, (unless you are connecting to an Oracle8i database or later).

### Oracle Applications User

This optional check box is displayed when Discoverer is configured to use both standard Discoverer EULs and Oracle Applications EULs.

If you DO NOT want to connect to an Oracle Applications EUL, make sure that this option is NOT selected.

If you DO want to connect to an Oracle Applications EUL, make sure that this option is selected.

### Connect button

Use this button to connect to the database using the connection details entered.



**Hint**

You cannot be connected to more than one End User Layer at a time. When you establish a new connection, all open business areas close and the connection to the current database terminates. You are prompted to save any changes before the new connection is established. If the new connection fails, you remain connected as the original user id.

## Create EUL Wizard: Step 2 dialog (Oracle Applications users)

Use this dialog to select the schema and create a password for the schema containing the Oracle Applications FND tables for the new Applications.

For more information, see:

["What is an End User Layer?"](#)

["What are Oracle Applications?"](#)

### Select the schema containing the Oracle Applications FND tables

#### Schema

Select the schema you want from the drop down list.

#### Password

Enter the password for the schema.

## Create EUL Wizard: Step 2 dialog

Use this dialog to select the default and temporary tablespace for the new user.

**Note:** These settings are database settings.

This dialog is also displayed as:

Create EUL Wizard: Step 3 dialog

For more information, see:

["What is an End User Layer?"](#)

### Default Tablespace

Select the database tablespace where the EUL tables, information, data, and documents are stored for this user.

For more information about EUL space requirements and storage parameters, see [Chapter 3, "What are the space requirements and storage parameters for a typical EUL?"](#).

For a default configuration, you typically choose the USR tablespace here.

- **Tablespace**  
Is a list of available tablespace in the database.
- **MB free**  
Is the amount of space available in the respective tablespace.
- **Auto Ext.**  
Tells if the Auto Extend feature is On or Off for the respective tablespace in the database. When this feature is on, the tablespace will automatically extend its size when necessary.

### Temporary Tablespace

Select the database tablespace where temporary data is stored for this user. For a default configuration, you typically choose TEMP here.

### Finish

Click this button to create the EUL as defined.

## Custom Folder dialog

Use this dialog to create custom folders. You do this by entering a SQL select statement. Like other folders, custom folders require joins in order for their data to relate to other data in the business area.

For more information, see:

["What are custom folders?"](#)

### Enter the SQL to define the custom folder

Use this field to enter the SQL statement that will define the folder. For example:

```
SELECT ENAME, JOB, SAL FROM EMP@ORCL
```

The Discoverer Administrator then creates items for each of the select list items. In Discoverer Plus, end users can use custom folders to build queries in exactly the same way as for other folders.

### Name

Use this field to enter a name for the folder.

### Validate SQL

Use this button to validate the SQL statement at any time before saving it. An invalid SQL statement prompts an error message.

### OK

Use this button to validate the SQL statement and save the custom folder.

### Notes

- Discoverer allows you to save the custom folder even if the SQL is invalid. This allows for situations where the SQL needs to be inserted into the EUL before the actual database objects are created or made available. However, users will not be able to query it until the SQL is corrected.
- If the SQL is invalid and you wish to correct it, select the custom folder in the Data tab and right-click to access its Properties dialog. Double-click on the Custom SQL field to display the Custom Folder dialog.

## Custom Folder Properties dialog

Use this dialog to look at or change the properties of the currently selected custom folder.

For more information, see:

["What are custom folders?"](#)

### **Name**

Use this field to enter a name for the folder.

### **Description**

Use this field to enter a brief description for the folder.

### **Visible to user**

Use this field to choose whether you want Discoverer end users to be able to see this folder in Discoverer Plus.

### **Valid**

This read-only field displays 'Yes' when the SQL statement used to create the custom folder is valid.

### **Custom SQL**

Use this field to display the "[Custom Folder dialog](#)", where you can change the SQL statement used to create the folder.

### **Identifier**

Use this field to change the unique Discoverer label assigned to the folder.

### **Notes**

- The Custom SQL field contains the SQL statement that defined the folder. If the SQL statement is incorrect, the custom folder will not be functional in Discoverer Plus.
- To view the entire statement resize the Properties window.

## Workarea: Data tab

The Data tab displays business areas and the folders and items that end users see in Discoverer Plus and Discoverer Viewer. The items include axis items, data point items, joins, conditions, and calculated items. Discoverer Administrator displays hidden folders and hidden items.

For more information, see:

["What is the Workarea?"](#)

["About the tabs in the Workarea window"](#)

In the Data tab you can move items from one folder to another. You can also create, edit and delete folders, complex folders, items, conditions, joins and delete business areas.

You can use the Properties dialog to examine and modify many attribute values as well as view the types and names of dependents for business areas, folders and items.

## Database Information dialog

Use this dialog to view the name of the database to which you are currently connected and the functions available. For example, to check that you have configured the database correctly.

For more information, see:

["What are the prerequisites for using Oracle Discoverer?"](#)

### **Connected to:**

Use this field to find out the name of the database to which you are connected. This field is a concatenation of your user name, the @ symbol and the database name.

The list box displays database configuration information as well as any functionality not available to this database user and why the functionality it is not available.

### **Notes**

If summary management is displayed as not available:

Summary management will not be available to a newly created EUL owner.

The following privileges must be granted to enable summary management:

- analyze any
- create any materialized view
- drop any materialized view
- alter any materialized view
- global query rewrite

The above privileges can also be set up from the script eulasm.sql

## Database Storage Properties dialog: List of tabs

Use this dialog to edit the database storage properties for summary folders. For example, to change the tablespace allocation, cache setting and refresh type.

**Note:** Database storage properties do not apply to summary folders based on external summary tables.

For more information about summary folders, see:

["Managing summary folders"](#)

["Creating summary folders manually"](#)

The Database Storage Properties dialog consists of four tabs:

### Properties

Use this tab to display the ["Database Storage Properties dialog: Properties tab"](#), where you view and set database storage properties and the summary table name

### Mappings

Use this tab to display the ["Database Storage Properties dialog: Mappings tab"](#), where you view the mappings between the Items in the Summary Combination and the columns in the summary table.

### Tablespaces

Use this tab to display the ["Database Storage Properties dialog: Tablespaces tab"](#), where you to view storage attributes for available tablespaces, including the available space in each tablespace. This information can help you to select a tablespace on the Properties page.

### 8i Properties (Oracle 8.1.7 databases or later)

Use this tab to display the ["Database Storage Properties dialog: 8i Properties tab"](#), where you view and set database storage properties that are specific to Oracle 8.1.7 (or higher) databases.



## Database Storage Properties dialog: 8i Properties tab

Use this dialog to view and set database storage properties that are specific to Oracle 8.1.7 databases and later.

For more information, see:

["About folders and summary folders in Discoverer"](#)

["What is manual summary folder creation?"](#)

The following chart lists the fields and their default values. When you select a field, the panel at the bottom of the dialog displays a message relating the purpose of the field and the data type it will accept.

Property	Datatype	Default Value	Range	Create/Edit
Parallel Inserts	boolean	No	Yes/No/Default	yes
No. of Processes	integer	1		yes, if parallel = yes
Logging	boolean	Same as user's tablespace	Yes/No	yes
Cache	boolean	No	Yes/No	yes, if logging = yes
Refresh Type		Complete	Complete/Fast	yes
Refresh		On Demand	On Demand/On Commit	
Last Refresh				read only
Incremental Load				read only
Stale	boolean	No		read only

### Refresh Type

- Incremental

Incremental refresh; only rows that have changed in the master tables will be applied to the summary tables. This is equivalent to the FORCE option where fast refresh is performed if possible.

For further information on the conditions required for incremental refresh, please see *Oracle9i Data Warehousing Guide*.

- Full

The summary is entirely recalculated from the detail tables.

### **Refresh Mode**

- On Demand

Refresh is carried out manually or through scheduled refreshes.

- On Commit

Refresh occurs every time detail tables are updated. There is no need to schedule refreshes and the scheduling option of the Summary Wizard is not enabled.

Restrictions apply as to when you can perform a Refresh On Commit. Please see *Oracle9i Data Warehousing Guide* for a complete description.

### **Incremental Load**

This read only property provides you with an indication as to the types of inserts to the detail/fact table that are available for incremental refresh support

- NO

The materialized view is not 'fast refreshable', and hence is complex

- Direct Load

Only direct loads will be handled

- DML

Only DMLs will be handled

- Direct Load and DML

Both direct loads and DML will be handled

- Direct Load and limited DML

Direct loads and a subset of DML will be handled

### **Parallelism**

Allows a degree of parallelism to be chosen for the refresh option.

### **Notes**

- This tab is visible when running against Oracle 8.1.7+ databases only.

## Database Storage Properties dialog: Mappings tab

Use this tab to find out how summary combinations are stored in the database. You can see how combination items map to columns in this summary table.

For more information, see:

["About folders and summary folders in Discoverer"](#)

["What is manual summary folder creation?"](#)

### **Item**

This field displays the name of the item in the business area.

### **Database column**

This field displays the column to which the item is mapped.

### **Datatype**

This field displays the data type of the item.

### **Notes**

- The Information on this tab is read only.
- This dialog does not apply to summary folders based on external summary tables.

## Database Storage Properties dialog: Properties tab

Use this dialog to view and set database storage properties and the materialized view name (or summary table name in pre-Oracle 8.1.7 databases).

For more information, see:

["Managing summary folders"](#)

["Creating summary folders manually"](#)

The following chart lists the attributes and their default values. All but the last four values are editable. When you select a value, the panel at the bottom of the dialog displays a message relating the purpose of the value and the data type it will accept.

Attribute	Datatype	Default Value*	Range	Create/Edit
Table Owner**	alphanumeric	current user		yes
Table Name	alpha	EUL-generated		yes
Tablespace**	alphanumeric	SYSTEM		yes
Initial Extent**	numeric	10K		yes
Next Extent	numeric	10K	minimum data block	yes
% Increase	numeric	50%	>=0%	yes
Min. Extent**	numeric	1	1-Maximum Extent	yes
Max. Extent	numeric	121	> Minimum Extent	yes
% Free	numeric/static	10%	0-100%	yes
% Used	numeric/static	40%	0-99%	yes
Status	alpha/static			read only
# Rows	numeric/static			read only
Error	alpha/static			read only
Last Refreshed				read only
<p>* Default values were obtained from the Oracle SQL Reference Manual. ** Non-dynamic properties; If you change non-dynamic storage properties that affect the placement of existing summary data the summary table completely rebuilds, so these operations can take some time.</p>				

The properties, Status, # Rows, and Error, are available only for existing summary folders; that is, a summary folder that has been completed and named. If you are in the Summary Wizard: dialog for internal combinations, these fields are dimmed. If you are in the Edit Summary Combinations dialog, these fields are active.

**Notes**

This feature does not apply to summary folders based on external summary tables.

## Database Storage Properties dialog: Tablespaces tab

Use this tab to view storage attributes for available tablespaces, including the available space in each tablespace. A notation in the Extend field indicates whether the tablespace extends automatically when more space is required.

For more information, see:

["About folders and summary folders in Discoverer"](#)

["What is manual summary folder creation?"](#)

### **Tablespace**

This field displays the name of the table.

### **Free Space**

This field displays the amount of open space left in the tablespace.

### **Used Space**

This field displays the amount of space currently used.

### **Extend**

This field indicates whether the tablespace automatically extends when more space is required.

### **Notes**

- This tab is read-only.
- This feature does not apply to summary folders based on external summary tables.

## Date formats dialog

Use this dialog to manage date hierarchies for use in Discoverer workbooks.

This dialog is also displayed as:

Hierarchy Wizard: Step 2

Edit Hierarchy dialog: Date formats tab

You can create a date hierarchy in one of two ways:

- Create a custom format mask of your own (see New Format button).
- Choosing from a set of predefined date format masks

For more information, see:

["What are hierarchies?"](#)

["What are date items?"](#)

["What are date format masks?"](#)

### Select date formats for the hierarchy

#### New Format

Use this button to display the ["New Date Format dialog"](#), where you can define a customized date format mask.

#### Description

This field displays a brief description of the data format currently selected in the right hand pane.

#### (Format pane)

To use a predefined format, select from the items listed in the left hand pane and click the right arrow button to copy them to the right hand pane.

#### Promote

Use this button to move the selected item up one level in the hierarchy.

**Demote**

Use this button to move the selected item down one level in the hierarchy.

**Notes**

- You can select more than one item by pressing the Ctrl key and clicking another item.



## Delete EUL dialog

Use this dialog to verify the name of the EUL to be deleted. Discoverer only enables you to delete the EUL to which you are currently connected.

For more information, see:

["What is an End User Layer?"](#)

### **EUL**

This field displays the name of the EUL that you have chosen to be deleted.

### **OK**

Use this button to delete the EUL selected above.

### **Cancel**

Use this button if the name displayed in the EUL text box is not the EUL you want to delete. Close the EUL Manager and reconnect to the EUL you want to delete.

## Edit Calculation dialog

Use this dialog to edit items and calculated items.

For example:

- to change the name or description of an item
- to change the name of a calculated item
- to amend the formula in a calculated item

For more information, see:

["What are calculated items?"](#)

### Show

Use this drop down list to display items and functions available. To include items or functions in the calculation, add them to the calculation box on the right.

### Paste

Use this button to add the item currently selected in the Show list to the Calculation box to the right.

### Name

Use this field to enter a name for the item or calculation. Discoverer Administrator creates a default name for you.

### Calculation

Use this text box to enter the item or calculation details.

- To create an item based on an item in the business area, select an item from the Show list. Then click Paste to add the item to the calculation box.
- To create a calculation, you can either:
  - Enter the formula directly into the Calculation box.
  - Paste items from the Show box on the left into your calculation.
  - Click the operator buttons underneath the Calculation box to use them in the calculation.
  - Use a combination of the above options.

### Operator buttons ([+] [-] [x] [/] [%] [(] [)])

Use these buttons to add operators to the calculation. Operators are copied into the Calculation box above.

### OK

Use this button to validate the calculation and save the item.

- If the calculation has valid syntax, the calculation is saved and displayed in the Calculations dialog.
- If the calculation has invalid syntax, an error message is displayed. You must correct any syntax errors before you can save the calculation.

### Notes

- When you use arithmetic expressions in a calculation, the multiply and divide operators are executed first, regardless of their position in the calculation. If you have more than one operator of the same precedence, they are evaluated from left to right. For example, the calculation Price – Discount \* Quantity is evaluated as Discount\*Quantity subtracted from Price. If you use parentheses around the subtraction expression (Price – Discount), the subtraction is executed before the multiplication.
- Functions Available

Category	Description
All Functions	An alphabetical list of all functions.
Conversion	Converting from one data type to another, such as: RAWTOHEX, TO_CHAR, TO_DATE
Database	Optional category that is displayed when user defined functions are available (created using the Register PL/SQL Functions facility on the Tools menu)
Date	Manipulating date items such as ADD_MONTHS, NEW_TIME, SYSDATE and NEXTDATE
Group	Aggregate and statistical functions including SUM, COUNT, MAX, MIN, VARIANCE
Numeric	Numeric items, transcendentals and floating point such as COS, LOG, MOD, POWER

<b>Category</b>	<b>Description</b>
Others	Miscellaneous functions such as LEAST, USER, DECODE, ROWNUM
String	Character items, text operations such as INITCAP, LPAD, NLS_UPPER
Analytic	Advanced statistical analysis, such as RANK, NTILE, CORR

## EUL Manager dialog

Use this dialog to create and maintain EULs for different database users. This dialog also enables you to install the Discoverer tutorial. The Discoverer tutorial adds an example business area to the current EUL that you can make available to Discoverer end users.

For more information, see:

["What is an End User Layer?"](#)

*Oracle9i Discoverer Administrator Tutorial*

### **Connect to EUL**

Use this button to display the name of the EUL to which you are currently connected.

### **Create EUL**

Use this button to display the ["Create EUL Wizard dialog"](#), where you create a new EUL for the current user or another user in the database. If you have sufficient database privileges, you can also create a new user and an EUL for that user at the same time by clicking Create EUL.

### **Delete EUL**

Use this button to display the ["Delete EUL dialog"](#), where you remove the current EUL. You can only delete the current EUL.

### **Install Tutorial**

Use this button to display the ["Install/Uninstall Tutorial Wizard Step 1 dialog"](#), where you import the tutorial data into the current EUL. If the tutorial has never been installed before, you must have sufficient database privileges to create the tutorial user.

### **Uninstall Tutorial**

Use this button to display the ["Install/Uninstall Tutorial Wizard Step 1 dialog"](#), where you delete the tutorial data from the current EUL. The tutorial user is not deleted.

## EUL Upgrade Error dialog

Use this dialog to find out about errors that have occurred during the EUL Upgrade procedure. Use the message displayed to diagnose and correct upgrade issues.

The error message typically includes an Oracle Database Error number that you can use to diagnose the error or issue. For example, the error number ORA-02298 is displayed when a table has orphaned child records. For more information about Oracle database error messages, see *Oracle9i Database Error Messages* in the Oracle documentation library.

For more information, see:

["Upgrading to Discoverer Version 9.0.2"](#)

["What is an End User Layer?"](#)

### **OK**

Use this button to close the dialog. Make sure that you make a note of the error message before closing the dialog.

### **Notes**

When you have resolved the error, reconnect to the EUL and the upgrade will resume automatically.

## EUL Upgrade dialog

This dialog informs you that you must upgrade your EUL tables to use the current software version.

For more information, see:

["Upgrading to Discoverer Version 9.0.2"](#)

["What is an End User Layer?"](#)

Upgrading the EUL tables requires existing users to install the equivalent version of Discoverer Plus in order to continue running queries and reports.

We recommend you export your EUL tables before starting the upgrade process.

### **Yes, I have completed a database export**

Select this check box once you have completed a database export. This enables the Upgrade button.

### **Upgrade**

Use this button to begin the EUL upgrade.

## Export Wizard Step 1 dialog

Use this dialog to choose what it is that you want to export to a file. You can export the entire EUL, business areas, folders, item classes, item hierarchies, date hierarchies, PL/SQL function registration information, summary folders, workbooks and the automated summary management (ASM) policy.

For more information, see:

["About copying EULs and EUL objects by exporting and importing"](#)

["Creating and maintaining business areas"](#)

**Export the entire End User Layer (EUL) if you want to copy its objects into a new EUL, or create a backup. Export selected business areas or selected EUL objects if you want to update an existing EUL.**

### What do you want to export?

#### The entire End User Layer

Select this option if you want to export the entire EUL to a file.

#### Selected Business Areas

Select this option if you want to export one or more business areas to a file.

#### Selected objects in the End User Layer

Select this option if you want to export one or more EUL objects to a file.

### Finish

Use this button to export this EUL, business area, folder or item as specified.

### Notes

- The Export option only exports the definitions for the EUL, business area or object being exported. It does not export the database, End User Layer Tables, or database objects referenced by the EUL, business area, or object definitions. If you import a business area, or object make sure you grant them access to the available database, EUL tables, and database objects that they reference.



## Export Wizard: Step 2 dialog (selected business areas)

Use this dialog to choose the business areas that you want to export to a file.

This dialog is displayed as:

Export Wizard: Step 2 dialog

For more information, see:

["What is an End User Layer?"](#)

["About copying EULs and EUL objects by exporting and importing"](#)

### **Which business areas do you want to export?**

**When you export a business area, all objects within it are also exported**

#### **Available**

This field displays all available business areas in the EUL.

Use this field to select one or more business areas and move them to the Selected field.

#### **Selected**

This field contains the business areas that you want to export.

To select a business area, move it from the available list into the selected list.

## Export Wizard Step 2 dialog (choose objects)

Use this dialog to select the individual EUL objects that you want to export.

This dialog is displayed as:

Export Wizard: Step 2 dialog

For more information, see:

["What is an End User Layer?"](#)

["About copying EULs and EUL objects by exporting and importing"](#)

### **Which objects do you want to export?**

Use this drop down list to select the kind of EUL object that you want to display in the Available field (e.g. business area definitions, folders, item classes, item hierarchies, date hierarchies and so on).

### **Available**

This field displays all available objects in the EUL for the currently selected object type (e.g. if you chose item classes then all item classes in the EUL are listed in this field).

Use this field to select one or more objects and move them into the Selected field.

### **Selected**

This field contains the EUL object(s) that you want to export.

All business area/folder relationships are shown in the selected list where possible.

## Export Wizard dialog - final step - save file

Use this dialog to specify where you want to save the export file and choose (optionally) whether to:

- save workbooks in XML
- save export commands as a text file (\*.txt)

You can subsequently import this export file into other End User Layers.

This dialog is also displayed as:

Export Wizard: Step 2 dialog

Export Wizard: Step 3 dialog

For more information, see:

["What is an End User Layer?"](#)

["About copying EULs and EUL objects by exporting and importing"](#)

### Where do you want to save the file?

Use the ["Browse"](#) button to display the ["Save As dialog"](#), where you specify where you want to save the export file and enter a name for the export file (saved with a .eex extension).

### The following objects will be exported:

Lists all of the objects that will be exported to the export file.

### Generate additional XML for exported workbooks

Select this check box to save the workbooks as XML in the .eex file.

Everything except workbooks is saved inside the export file in XML format. To save workbooks in XML format you choose this option. By saving workbooks additionally in XML format you can view any included workbook definitions (as opposed to results) in an XML browser.

### Save export commands as text file (\*.txt)

Select this check box if you want Discoverer to create an additional text file containing the commands that were used to create this export (for more information, see [Chapter 21, "About using the Discoverer command line interface"](#)).

## Save As dialog

This is displayed when you use the Browse button next to the "[Where do you want to save the file?](#)" field above.

### **Browse**

Use this button to display the Save As dialog where you specify the location to save the selected EUL objects to a file.

### **Save in**

Use this drop down list and the navigation buttons to navigate to where you want to save the current EUL objects.

### **File Name**

Use this field to enter a name for the export file.

It is a good idea to give a name that suggests the kind of EUL objects you are exporting. This makes it easier to locate them when you want to import to other EULs later.

### **Save as type**

Use this drop down list to select the format in which to export the file.

By default, Discoverer business areas are saved with the EEX file extension.

### **Save**

Use this button to return to the Export Wizard dialog - final step - save file.

### **Notes**

The Export option only exports the definitions for the EUL objects. It does not export the database, End User Layer Tables, or database objects referenced by the EUL object definitions. If you import an .EEX file, make sure that the EUL objects have access to the database, EUL tables, and database objects that they reference.

## Folder Properties dialog

Use this dialog to configure properties for the currently selected folder. For example, to change the name of a folder, or the owner of a table.

For more information, see:

["What are folders?"](#)

The Folder Properties dialog contains three tabs:

- ["General tab"](#)
- ["Dependents tab"](#)
- ["Components tab \(complex folders\)"](#)

### General tab

Use this tab to configure the properties of the current folder.

#### **Name**

Use this field to enter a unique name for the folder. The contents of this field are displayed in the Discoverer Plus folder selection dialog. The name of the folder must be unique in the End User Layer. You cannot have two folders with the same name, even in different business areas.

#### **Description**

Use this field to enter a brief description of the folder. The contents of this field are displayed on the description line of the Query Wizard.

#### **Visible to user**

Use this field to specify whether the folder is displayed to the end user in the Discoverer Plus Query Wizard. Choose Yes to display this folder. You can use this property to hide items that are not directly of value to the end user, but need to be included in the business area because of joins or calculations. Folders not visible to the end user will be displayed in Discoverer Administrator in gray to indicate their hidden status.

#### **Database**

This field specifies the location of the source database which stores the table corresponding to the folder. To change the database, click this field to display the Choose Database dialog and select from the drop down list.

## Owner

This field specifies the database user ID or owner of the table or view corresponding to the folder.

To change the owner, either type in the owner directly or click on the field and then click the button to display the Choose user dialog where you can select from the list.

The Owner field can be left blank. In this case the owner property is not specified in subsequent SQL references (through Discoverer Plus) to that folder. For example, a SQL select statement could now read as follows:

```
select <column> from <table>  
rather than:  
select <column> from <owner>.<table>
```

This is useful as it enables you to create/maintain an EUL for which the tables or table owners are not yet available, or to which the EUL administrator does not have access. It also enables multiple users (such as Oracle Applications users) each with their own schema in an EUL, to access their schema tables when making queries in Discoverer Plus.

## Object

This field displays the name of the database object that corresponds to this folder. If a new table or view name has been chosen, it will appear here. To change the object, click this field to display the "Choose user or table/view dialog" and select from the list. You can choose an object from a different owner or a different business area.

If you select an Object name, the Database and Owner fields will also be re-populated with the database and owner values of the selected Object (irrespective of whether the Owner field was blank or not).

## Optimizer hints

Use this field to place a specific optimizer hint against the folder. The hint is not visible in Discoverer Plus. For more information about how to use optimizer hints, see an appropriate release of the *Oracle designing and tuning for performance* documentation.

## Identifier

This field contains a unique name that Discoverer uses to identify EUL and workbook objects. When matching objects common to different EULs, Discoverer

uses Identifiers to locate objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

### **Notes**

- If the Owner field is left blank, summary tables (in pre 8.1.7 databases) based on this folder are not allowed. If a summary folder already exists a warning message is displayed.
- If the Owner field is changed, summary tables (in pre 8.1.7 databases) based on this folder need to be refreshed. If a summary folder already exists a message is displayed advising you to refresh the summary folders based on this folder.

## **Dependents tab**

The Dependents tab displays two columns (Type and Name) that clarify the extent to which other objects (e.g. folders, joins, items, item classes, summaries, conditions, calculations, workbooks, scheduled workbooks) are dependent on the selected folder.

### **Type**

This field displays the type of item that has a dependency on the current folder. For example, folders, conditions, summaries, workbooks, scheduled workbooks.

### **Name**

This field displays the name of each item that has a dependency on the current folder.

## **Components tab (complex folders)**

This tab displays all component folders (and their items) that are used by this complex folder.

## Workarea: Hierarchies tab

Use this tab to look at hierarchies in the EUL grouped by business area. Discoverer end users use the hierarchy in worksheets to drill down through hierarchically organized items.

For more information, see:

["What are hierarchies?"](#)

### Show

Use this drop down list to change which types of hierarchy are displayed. You can choose to view user or system defined hierarchies, and choose to display the different types of hierarchies (for example, item, date or all hierarchies).

### Notes

- You can review the contents and the organization of each hierarchy and view the hierarchy templates provided by Discoverer Administrator.



## Hierarchy Wizard dialog

Use this dialog to select the type of hierarchy that you want to create. For example, to select a date hierarchy when you want Discoverer end users to be able to drill into time-based data.

For more information, see:

["What are hierarchies?"](#)

["What are item hierarchies?"](#)

### Item hierarchy

Use this radio button to select the item hierarchy type.

### Date hierarchy

Use this radio button to select the date hierarchy type.

### Notes

- The hierarchical relationships that you create are not defined in the database, but in the business area.
- Item hierarchies are used to connect multiple items in a specified order, allowing your user to drill up and down to different levels of detailed information. For example, you can connect the columns country, region, district, and retail store to create a location-based sales hierarchy. Each higher item (country is higher than region, for example) being a super-set of the items below it. When you create this sales hierarchy, users can create a worksheet that displays sales by country, then drill down to get regional details for each country, and so on down to the retail store level.
- A date hierarchy lets your users drill up or down into date items from virtually any time-based perspective. For example, users can see sales data based on year, then drill down to quarter, and even further to month. Date hierarchies, unlike Item hierarchies, possess an inherent structure based on year, quarter, month, week, day, hour, minute, and second. Therefore, Discoverer Administrator uses pre-existing Date Templates to define many common formats for date hierarchies. In addition, you can create customized date hierarchies.

## Impact dialog

Use this dialog to assess the impact of refreshing or deleting an object (e.g. business area, folder, item, item class, join, condition, hierarchy).

Based on the information displayed, you can determine if it is safe to carry out the current action against the object.

For more information, see:

["Confirm Business Area Delete dialog"](#)

["Confirm Delete dialog"](#)

["Confirm Folder Delete dialog"](#)

### Type

Use this column to view any dependent EUL objects that might be affected by the current action you are taking. The EUL objects listed here can include workbooks, scheduled workbooks, summary folders, business areas, folders, items, joins, conditions and item classes.

If you select a row, Discoverer displays text that indicates the effect the current action will have on the EUL object.

The following table lists the messages that Discoverer can display when workbooks, summary folders or other EUL objects are affected by the current action:

Scenario	Message Discoverer displays in Impact dialog
Workbook definitely affected	The object you are deleting is referenced by this workbook
Workbook may be affected	A probable impact to this workbook has been detected. Please open and close the workbook to re synchronize it with the current EUL.
Summary	You will need to remove the object from the summary before being able to delete it.
Item Class	This object will be updated.
All other eul objects	This will be deleted.

**Name**

Use this column to view the name of the EUL objects that might be affected by the current action you are taking.

**Notes**

- Discoverer Administrator does not refresh or delete dependent workbooks when you refresh or delete an EUL object. Subsequent use of a workbook however, will be affected when you delete an EUL object that has dependent workbooks.
- The Impact dialog displays dependent workbooks that are saved to the database. Dependencies might also exist in workbooks that are saved locally, such workbooks are not displayed in the Impact dialog.
- Discoverer does not delete an EUL object that has dependent summary folders. You must manually remove such summary folders first. You delete summary folders at the Summaries tab in the Workarea (for more information, see [Chapter 15, "How to delete summary folders"](#)).

## Import PL/SQL Functions dialog

Use this dialog to select the PL/SQL function that you want to import into the End User Layer.

For more information, see:

["Why do you need PL/SQL functions?"](#)

The functions listed in this dialog have been defined in the database using SQL commands. For more information about defining PL/SQL functions in the database, see the *PL/SQL User's Guide and Reference*.

### Select functions to import

Use this list to select one or more functions that you want to import from the database.

### OK

Use this button to import the functions selected and return to the PL/SQL Functions dialog.

### Notes

You can select more than one function by pressing the Ctrl key and clicking another function.

## Import Wizard: Step 1 dialog

Use this dialog to choose which EUL files to import. For example, to import a business area stored in a file Sales.EEX.

For more information, see:

["About copying EULs and EUL objects by exporting and importing"](#)

### **Add**

Use this button to display the Open File dialog, where you can locate the export file (.EEX) that you want to import.

Once you have selected one or more files to import, the selected files appear in the list above.

### **Add the files you would like to import**

This window displays the list of files that you have selected for import.

### **Delete**

Use this button to delete a highlighted export file from the list of files.

## Import Wizard: Step 2 dialog

Use this dialog to choose how to process objects common to different EULs. For example:

- the existing business area contains a folder called Sales
- the business area that you want to import contains a folder called Sales
- you might want to rename the duplicate folder in the import business area to Sales\_2
- after the import, the EUL contains two folders: Sales and Sales\_2

For more information, see:

["About copying EULs and EUL objects by exporting and importing"](#)

### If two objects match then what action should occur?

#### **Rename the imported object**

Use this radio button to rename imported objects to differentiate them from your existing objects. For example, if you are importing a matching Folder named 'Sales', selecting this option would rename the imported Folder to 'Sales1' leaving you with two Folders, your existing one named 'Sales' plus the imported Folder named 'Sales1'.

#### **Rename the existing object**

Use this radio button to rename your existing objects to differentiate them from imported objects. For example, if you are importing a matching Folder named 'Sales', selecting this option would rename your existing Folder to 'Sales1' leaving you with two Folders, your existing one renamed 'Sales1' plus the imported Folder unchanged as 'Sales'.

#### **Do not import the matching object**

Use this radio button to not import objects that match your existing objects. For example, if you are importing a matching Folder named 'Sales', selecting this option would not import the matching Folder 'Sales' leaving you with your existing Folder unchanged as 'Sales'.

**Refresh the object**

Use this radio button to refresh any matching objects. For example, if you are importing a matching Folder named 'Sales', selecting this option would update your existing Folder 'Sales' leaving you with one Folder named 'Sales'.

**Preserve display related properties**

Use this check box to not refresh the following properties (the underlying formulas are refreshed):

Default position, heading, format mask, alignment, word wrap, display case, replace NULL with, default position.

**How you would like objects to be matched up?****By Identifier**

Use this radio button to match objects using object Identifiers. To ensure that Conceptually Identical Objects are matched correctly, use this option instead of the Display Name option.

**By Display Name**

Use this radio button to match objects using the object Display Name. This option is included here for backwards compatibility - we recommend matching By Identifier.

**Should the current user take ownership of imported workbooks?****Always take ownership of imported workbooks**

Use this radio button to set the owner of imported workbooks to your current user ID.

**Only take ownership if original owner cannot be found**

Use this radio button to set the owner of imported workbooks to your current user ID only if the original owner cannot be found in the current database.

**Notes**

If you have renamed any of your objects, use the By Identifier option for more accurate object matching.

## Import Wizard: Step 3 dialog

Use this dialog to start the import process and monitor its status as each EUL object is processed.

For more information, see:

["About copying EULs and EUL objects by exporting and importing"](#)



Once you press the Start button, the status bar at the top of the page shows the percentage of the import that has completed.

### Start

Use this button to start the import.

### Log

Use this window to monitor messages as they are displayed:

-  These messages provide information about imported objects.
-  These messages are warnings about potential problems.

### Save log...

Use this button to save a copy of the import log to a text file. At the File Save as dialog, choose a filename and location for the text file.

### Clear Log

Use this button to clear the messages from the Log window.

### Cancel

Use this button to abort the import - you might want to use this option if there are warning messages in the Log window.

### Finish

Use this button after a successful import to close the dialog and return to the Discoverer work area.



### **Notes**

To synchronize the EUL with the source dictionary information to incorporate modifications in the database, choose File | Refresh from the Discoverer main menu.

## Install Tutorial Wizard Step 3 dialog

Use this dialog to select the default and temporary tablespace for the VIDEO5 database user by clicking your choice in the list.

For more information, see:

["EUL Manager dialog"](#)

*Oracle9i Discoverer Administrator Tutorial*

### **Default table space**

Select the database tablespace where the data is stored for VIDEO5. The table space you select must have at least 10 MB free.

- **Tablespace**  
Is a list of available tablespace in the database.
- **MB free**  
Is the amount of space available in the respective tablespace.
- **Auto Ext**  
Tells if the Auto Extend feature is On or Off for the respective tablespace in the database. When this feature is On, the tablespace will automatically extend in size when necessary.

### **Temporary tablespace**

Select the database tablespace where temporary data is stored for VIDEO5.

## Install/Uninstall Tutorial Wizard Step 1 dialog

Use this dialog to confirm the EUL name into which you want to import the tutorial business area.

For more information, see:

["EUL Manager dialog"](#)

*Oracle9i Discoverer Administrator Tutorial*

## Install Tutorial Wizard Step 1

The Install Tutorial Wizard helps you install the tutorial tables, data and other necessary files.

You can only install the tutorial in the current EUL (End User Layer).

### **EUL**

Displays the name of the EUL where the tutorial information will be installed.

## Uninstall Tutorial Wizard Step 1

Use this wizard to uninstall the tutorial data and tables from the current EUL.

**Note:** The VIDEO5 database user will not be removed from the database.

### **EUL**

Use this field to verify that this is the EUL you want to remove the tutorial from.

### **Notes**

If this is not the correct EUL, click Cancel. Then, close the EUL Manager and reconnect to the correct EUL.

## Install/Uninstall Tutorial Wizard Step 2 dialog

Use this dialog to validate your user ID by entering the tutorial user's password.

For more information, see:

["EUL Manager dialog"](#)

*Oracle9i Discoverer Administrator Tutorial*

## Install Tutorial Wizard Step 2

You must have access to the VIDEO5 database user in order to install the tutorial.

### User

This field displays the name of the tutorial database user (VIDEO5). This field can not be changed.

### Password

Use this field to enter the password for the VIDEO5 database user. If this is the first time the tutorial has been installed in the current database, you create the password by entering it in this box.

### Confirm password

Use this field to re-enter the password you entered in the Password text box to confirm the new tutorial user's password. If the tutorial was previously installed in any EUL in the current database, you will not need to confirm this password.

### Finish

Use this button to install the tutorial in the current EUL.

## Uninstall Tutorial Wizard Step 2

You must have access to the VIDEO5 database user to uninstall the tutorial.

### User

This field displays the name of the tutorial database user (VIDEO5). This field can not be changed.

### Password

Use this field to enter the password for the VIDEO5 database user.

### **Finish**

Use this button to uninstall the tutorial from the current EUL.

### **Notes**

If you do not know the password, contact the DBA, who can re-set the password for this user.

## Item Class Wizard dialog

Use this dialog to enter a name and description for a new item class.

This dialog is also displayed as:

Item Class Wizard: Step 3

Item Class Wizard: Step 5

Item Class Wizard: Step 6

Edit Item Class: General tab

For more information, see:

["Maintaining items and item classes"](#)

### **Item class name**

Use this field to enter a name for the new item class. Discoverer Administrator enters a default name for you that you can use. This name is used to identify the item class in other dialogs.

### **Item class description**

(Optional) Use this field to enter a brief description for the new item class.

## Item Class Wizard: Advanced options for list of values dialog

Use this dialog to change advanced list of value (LOV) options for an item class. The settings made here affect how Discoverer Plus users select and display LOV options.

This dialog is also displayed as:

Item Class Wizard: Step 4

Item Class Wizard: Step 5

Edit Item Class: Options tab

For more information, see:

["Maintaining items and item classes"](#)

### Retrieve values in groups of

Use this spin box to specify the maximum number of rows to display to an end user (for each array fetch of data from the database), when a list of values is expanded in Discoverer Plus.

Discoverer end users see the results of each database array fetch as a block of data that they can scroll up and down. End users can also easily display the next block of data (for more information, see the *Oracle9iAS Discoverer Plus User's Guide*).

This setting is useful in Discoverer where a LOV might contain many rows, as it removes the risk of having to wait to retrieve all the values from the database at once. Discoverer displays the LOV values in blocks of a specific number of rows.

**Note:** The value set here is used as a default when the **Require user to always search for values** check box is cleared (for more information, see the ["Require user to always search for values"](#) item below).

**Note:** In Discoverer Plus, the server will always fetch from the database, the number of rows specified in the **Retrieve values in groups of** field no matter how large the number is. However, the maximum number of values that can be fetched by the client from the server is 100.

This means that if the Discoverer manager sets the fetch size to be 1000, (more than the 100 maximum above), in Discoverer Plus the rows are always fetched by the client in groups of 100. If the Discoverer manager sets the fetch size to be 50, (less than the 100 max), in Discoverer Plus the rows are always fetched in groups of 50.

### **Sort the values and remove duplicates**

Select this check box to hide duplicate values and alphabetically sort the display order of the list of values (for an item class) in Discoverer.

Clear this check box to display duplicate values and display rows in the same order as the values stored in the database.

This option enables you to decide whether LOV statements should automatically add the DISTINCT and ORDER BY clauses. If you know that your data is already distinct and ordered (or if it doesn't matter if your data is returned this way) then you can choose to turn this setting off.

**Note:** The time taken to display large lists of values depends upon how long it takes to complete a search of the database tables. Clearing this check box can improve the time taken to display large lists of values.

### **Show values in "Select Items" page of Worksheet Wizard**

Select this check box when you want Discoverer to display LOV items in the Select Items dialog of the Worksheet Wizard (the item navigator).

Clear this check box and Discoverer Plus does not display list of value items in the Select Items dialog of the Worksheet Wizard.

**Note:** In the Item Navigator, the LOV does not use the array fetch size (as specified in the ["Retrieve values in groups of"](#) spin box). In this specific instance only, Discoverer will fetch all the values first before they are displayed. If you have millions of rows, this could potentially take a long time and you would want to have this option selected.

### **Require user to always search for values**

Sometimes, for performance reasons you may want to force end users to query a subset of the LOV. To do this you use this check box.

Select this check box when you want Discoverer to display a **Search Criteria** field that forces end users to enter search criteria to reduce the list of values to a subset of the whole list.



Clear this check box when you want Discoverer to display the number of rows specified in the **Retrieve values in groups of** spin box (for more information, see ["Retrieve values in groups of"](#)).

### **Cache list of values during each connection**

Select this check box to cache the LOV (during the current session) once it has been displayed for the first time. Use a cache when your data is static during your session. This is the recommended setting.

Clear this check box to fetch LOVs from the database each time. This option is most useful when the data is extremely dynamic and you wish end users to always see the very latest (up-to-the-second) list of values.

## Item Class Wizard: Choose Attributes dialog

Use this dialog to choose the type of item class that you want to create. For example, to choose to create a list of values (LOV) that Discoverer end users can use when choosing parameter values to restrict workbooks.

This dialog is also displayed as:

Item Class Wizard dialog

For more information, see:

["Maintaining items and item classes"](#)

**Choose which type of attribute(s) you want to include in this item class.**

### List of Values

Use this check box to create a set of the unique values that exists for an item. The values correspond to those found in a database column.

### Alternative Sort

Use this check box to sort items by criteria you define. Items are normally sorted in ascending or descending order according to ASCII sort values. Sometimes, however, you may want to sort data objects in an alternative order. For example, you may want to sort sales regions North, South, East, and West in that order, so the alternate sort order would be North=1, South=2, East=3 and West=4.

### Drill-to-detail

Use this check box to allow users to drill from summary information into more specific information. These items do not need to be in the same folder.

### Notes

- To create an alternative sort order, you must first add a column to the database table containing the column to be sorted.
- The item to be sorted with an alternate sequence must be contained within the same folder as the item providing the list of values for the item class. An item class containing an alternate sort sequence must also contain a list of values.

## Item Class Wizard: Select Item dialog (if you chose alternative sort)

Use this dialog to select the item on which to base the alternative sort.

This dialog is also displayed as:

Item Class Wizard: Step 3

Edit Item Class: Alternative Sort tab

For more information, see:

["Maintaining items and item classes"](#)

### Select the item containing the alternative sort sequence

#### Folder

Use this field to select an item on which to base the alternative sort.

**Note:** The alternative sort item must be in the same folder as the list of values.

## Item Class Wizard: Select Item dialog (on which to base LOV)

Use this dialog to select the item on which to base the list of values.

For more information, see:

["Maintaining items and item classes"](#)

This dialog is also displayed as:

Item Class Wizard: Step 2

Edit Item Class: List of values tab

### Select the item that generates list of values

#### Folder

Use this field to select an item on which to base the list of values. You can choose from any Business Area in the End User Layer.

#### Notes

- Selecting a Business Area displays its folders.
- Click the plus (+) symbol to open folders and view the items contained in them.

## Item Class Wizard dialog (select items that use this item class)

Use this dialog to specify which items in the business area will use the new item class. For example, if you create a list of values on Month (January, February, March etc.), you might want to specify all month items here. When Discoverer end users query on month, they can choose from January, February, March etc.

This dialog is also displayed as:

Item Class Wizard: Step 2

Item Class Wizard: Step 3

Item Class Wizard: Step 4

Edit Item Class: Select Items tab

For more information, see:

["Maintaining items and item classes"](#)

### Select the items that use this item class.

#### Available items

Use this drop down list to select a business area. Select the items that you want to use the item class from the expandable list below. To select items, move items from the **Available items** list to the **Selected items** list.

#### Selected items

This list contains items that will use the item class.

#### Notes

- If you do not select the items using the item class, you will need to apply the item class to specific items later.
- You can select more than one item by pressing the Ctrl key and clicking another item.

## Workarea: Item Classes tab

Use this tab to look at item classes in the EUL grouped by business area.

For more information, see:

["Maintaining items and item classes"](#)

### **Show**

Use this drop down list to change which types of item class are displayed. You can choose to view user or system defined classes, and choose to display the different types of class (for example, list of values or alternative sort).

### **Notes**

In each item class folder, you can see a list of values assigned to the item class. Opening a list of values folder displays each unique occurrence of data values as a set. This display clearly shows which items use a particular item class.

## Item Properties dialog

Use this dialog to configure item properties. For example, to change the name or formula of an item.

For more information, see:

["Maintaining items and item classes"](#)

The Item Properties dialog contains two tabs:

- **"General"** - use this tab to configure the item. For example, to change the item.
- **"Dependents"** - use this tab to look at other items dependent on this item. For example, summaries that use the item.

### General

#### Name

Use this field to change the name of the item.

#### Description

Use this field to change the description of the item. The contents of this field are displayed on the description line of Discoverer Plus's Query Wizard.

#### Data type

(Read only) This field displays the data type of the item, supplied by the column definition in the data dictionary. This field is not editable because it identifies the data type directly from the dictionary.

#### Formula

Use this field to display the ["Edit Calculation dialog"](#) where you change the item's formula. A formula displayed in this field means the item is a derived item. A derived item is created, by applying a calculation to an existing item. For example, a derived item may be the calculation for percentage profit. Deriving items in the business area means users do not have to know complex formulas themselves in order to calculate analysis results. A field containing a column name indicates that it is not a derived item and that its data comes directly from the database column (in this case, the field is not editable).

### **Database column**

This field displays the derivation of the item. It consists of the owner's user name, the table name and column name. If this field is blank, the column has been created from a formula.

### **Visible to User**

Use this field to specify whether the item is visible to Discoverer end users:

- choose Yes to display the item in Discoverer Plus.
- choose No to hide the item in Discoverer Plus

**Note:** You typically use the No option to hide items that must be present in the folder to be used in calculations, but are of no value or are inappropriate to display to the end user. Other hidden items may contain data such as primary and foreign keys or sensitive data such as salary information.

### **Item Class**

Use this field to change the item class to which the item belongs. Use the list to select an alternative item class. This field is active only when the item is an axis item.

### **Date Hierarchy**

Use this field to change the date hierarchy that is applied to the item. A list is available of valid date hierarchies that can be applied to the item. The field is inactive when the item is not a date item.

### **Default position**

Use this field to change where the item is positioned by default on worksheets.

### **Default aggregate**

Use this field to change the aggregate type for the item (if numeric).

### **Heading**

Use this field to change the heading of the column that is displayed on worksheets. By default, the heading is the item's column name, which is derived from the item name.



### **Format mask**

Use this field to change the default format mask used to display the item in Discoverer end user workbooks. The syntax uses standard Oracle formats found in the Server SQL Language Reference Manual, which is supplied with your Oracle database. By default, a listing shows sample format masks appropriate for the item's data type. You can enter your own format mask if the samples do not list the one you want.

**Note:** Discoverer Administrator does not currently enable you to use the Euro currency symbol in the format mask. You can specify the Euro currency symbol in the format mask using Discoverer Plus. For more information, see the *Oracle 9iAS Discoverer Plus User's Guide*.

### **Alignment**

Use this field to change the alignment of data displayed in Discoverer Plus. Select an alignment from the pull down menu. The default selection, General, right aligns numeric data, and left aligns date and text data.

### **Word Wrap**

Use this field to specify whether text data wraps in Discoverer Plus.

**Note:** Setting this to Yes can impact on performance in Discoverer Plus when accessing large amounts of text data.

### **Case Storage**

Use this field to specify how text items are stored in the database, independent of how they are displayed. The Discoverer end user does not see this information. It enables you to optimize the use or display of this information in end-user workbooks. For example, if the data is already being stored correctly, you do not need to modify the text using the Display case option. Setting this value can improve the user's performance when running queries with conditions. If the data is always stored in uppercase in the database, set the value to uppercase. If the data is stored in lowercase, set the value to lowercase.

### **Display case**

#### **Display Case**

Use this field to change how items are displayed in workbooks.

### **Default width**

Use this field to change the item's default width (in characters) when displayed in end-user reports. This value is only used if Use Default Width is set in Discoverer Plus (under Tools | Options | Table).

### **Show NULL as**

Use this field to change how null characters are displayed. For example, null = We're out... order now!, null = 0, null = nothing visible, or space.

### **Content type**

Use this field to specify whether the item can be used to launch an external application. Choose FILE if the data item contents require a helper application to run, such as Microsoft Excel. Choose NONE if the data type does not require a helper application.

If the item is a BLOB (binary large object), the file extension determines the application (.exe executable file) used to view the item. For example, .DOC uses MS Word, .WAV plays a sound through the currently registered sound player for WAV files. These associations are set up in your computer's operating system.

**Note:** If the content is an image that is stored in the database, or a drill out image (e.g. a HTML icon indicating a drill out to a Web report), choose 'NONE' (for more information, see [Chapter 9, "About drilling out to other applications"](#)).

### **Max char fetched**

Use this field to specify the maximum amount of characters retrieved in a SQL call to the database. This option is particularly useful for LONG data types. The purpose of limiting the total amount is that sometimes there are hundreds, perhaps thousands of characters in a data element and it would be inefficient or unnecessary to retrieve the entire data element.

### **Identifier**

Use this field to change the unique name that Discoverer uses to identify EUL and workbook objects. When matching objects common to different EULs, Discoverer uses Identifiers to locate objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

**Warning:** It is not advisable to change an Identifier as it can affect the relationships between EUL objects.

**Note:** The primary use for the formula and database columns is for tracking the source of the item's data. For example, if something has changed in the underlying database or data dictionary, this field provides an audit trail identifying the data's original source. It provides information to the data Discoverer manager about exactly where the data came from.

### **Dependents**

This tab displays two columns (Type and Name) that clarify the extent to which other objects (Folders, Joins, Items, Item Classes, Summaries, Conditions, Calculations etc.) are dependent on the selected Item.

### **Type**

This field displays one or more object types (E.g. Folders, Items etc) that have a dependency on the selected Item

### **Name**

This field displays the name of each object listed in the Type column

## Items dialog

Use this dialog to select an item to use when you create or edit a condition.

For more information, see:

["What are conditions?"](#)

Discoverer displays this dialog when you choose the **Select Item...** option from the drop down list in the **Value(s)** field of the New/Edit Condition dialog.

### **Select an item:**

Choose an item to display in the **Value(s)** field of the New/Edit Condition dialog.

Use the OK button to display the selected item in the **Value(s)** field.

The item that you select here is used in the current condition statement of this condition.

## Items that use date hierarchy dialog

Use this dialog to specify which items in the business area use a defined hierarchy. For example, if you create a hierarchy: Year - Month - Week - Day, you might want to specify year, month, week, and day items here. When Discoverer users drill on these items, they can use this hierarchy in the drill path.

To do this, select one or more date items from the list of available items in the Business Area and click the right arrow button to move them into the Selected Items pane.

This dialog is also displayed as:

Hierarchy Wizard: Step 3

Edit Hierarchy dialog: Items tab

For more information, see:

["What are hierarchies?"](#)

["What are items?"](#)

### Select the items that use this date hierarchy.

#### Available items

Use this pull down list to select a business area. Select the items that you want to use the hierarchy from the expandable list below. To select items, move items from the Available items list to the Selected items list.

#### Selected items

This list contains items that will use the hierarchy.

#### Notes

You can select more than one item by pressing the Ctrl key and clicking another item.

## Join Options dialog

Use this dialog to configure a join.

For more information, see:

["What are joins?"](#)

### **Outer join on detail**

Use this check box to create an outer join on the detail table. This returns all master rows that have no corresponding detail items, plus all matching master and detail rows.

### **Outer join on master**

Use this check box to create an outer join on the master table. This returns all detail rows that have no corresponding master, plus all matching detail and master rows. This construct is fairly rare in real schemas. It requires the Detail foreign key can have null values option.

### **Detail foreign key can have null values (summary tables will not be used with this join)**

Use this check box to display rows for detail items where the value may be null.

This setting should only be used on rare occasions, and only affects a particular situation when summary tables are used to satisfy a query. Foreign keys usually have values and in most cases, they are mandatory columns in the database.

This setting is required if you are setting detail rows that have no master, because it implies that the foreign key column will contain some null values. On its own it has no effect on SQL generation, but is required to determine when Discoverer can use summary tables in some special circumstances.

For example:

If you have created a summary folder that contains items from both a master and a detail folder:

- and the folders are joined with this option enabled
- and a user issues a query which uses items only from the detail folder,
- then the summary table will not be used to satisfy the query, because Discoverer cannot guarantee that the row set is the same in both cases.

If the Detail foreign key can have null values check box is not selected, this query uses the summary table. This is this setting's only effect.

### **One to one join relationship between master and detail**

Use this check box to create a one-to-one relationship instead of a one-to-many relationship between the master and detail tables. There is no real master and detail in this case, because there is only one row in each. These joins are unusual, but do occur in schemas occasionally.

This setting has no effect on the SQL that Discoverer generates, because SQL does not know about the cardinality of joins. It only affects the fan trap detection described in [Chapter 10, "What is a fan trap?"](#).

Because true one-to-one joins do not result in Cartesian products, it is possible to query a master with multiple detail folders, provided that all but one of the detail folders are joined with one-to-one joins. If these were all one-to-many joins, making it possible for a row in one detail table to join to many rows in another detail table, and vice versa, the result is a Cartesian product. Cartesian products are explicitly disallowed in Discoverer, because they are almost never the desired or expected result.

## Join Properties dialog

Use this dialog to configure join properties. For example, to change the name of an join or change its join relationship.

For more information, see:

["What are joins?"](#)

The Join Properties dialog contains two tabs:

- **"General"** - use this tab to configure the item. For example, to change the item.
- **"Dependents"** - use this tab to look at other items dependent on this item. For example, summaries that use the item.

## General

### Name

Use this field to change the name of the join. By default, Discoverer Administrator will name the join item by combining the master and detail folder names.

### Description

Use this field to change the description of the join. By default, description names are in the form: Master Folder.Item and Detail Folder.Item.

### Master

Use this field to change the folder name of the master key column in the join. This value comes from the data dictionary and is not editable.

### Detail

Use this field to change the folder name of the detail key column in the join. This value is supplied by the data dictionary and is not editable.

### Formula

Use this field to display the ["Edit Join dialog"](#), where you specify how the items are joined.

### Outer join on

Use this field to specify an outer join on the detail folder. This field can display the values **None** or **Detail folder**.



Use an outer join when you want to return rows for master records that have no matching detail records or for detail records that have no matching master records.

### **Detail item values**

Use this field to specify whether detail items must always exist in the master folder. This field can display the values **Always exists in master folder** or **Might not exist in master folder**.

### **Join relationship**

Use this field to specify the join relation. For example, from 'One to one' to 'One to many'.

Use the **One to one** join to join two tables that have a one to one relationship. For example to join a 'Manager' table to a 'Department' table. In this case there will only ever be a single manager for any one department.

Use the **One to many** join to join two tables that have a one to many relationship. For example, to join a 'Departments' table to an 'Employees' table. In this case there can be many employees in each department.

### **Identifier**

A unique name that Discoverer uses to identify EUL and workbook objects. When matching objects common to different EULs, Discoverer uses identifiers to locate objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

## **Dependents**

The Dependents tab displays two columns (Type and Name) that clarify the extent to which other objects (folders, joins, items, item classes, summaries, conditions, calculation items etc.) are dependent on the selected join.

### **Type**

Displays one or more object types (e.g. folders, items) that have a dependency on the selected join

### **Name**

Displays the name of each object listed in the Type column

### **Notes**

Using the Join Properties dialog, you can inspect and edit more than one join item at a time. Select a join to view its properties. If you select more than one join and make a change to a property that is common to the selected joins, the changes apply to all selected joins.

## Load Wizard: Step 1 dialog

The Load Wizard enables you choose how you want to open a business area. For example, you might want to:

- create a new business area
- open an existing business area

For more information, see:

["What is the Load Wizard?"](#)

["How to create a business area using the Load Wizard"](#)

### What do you want to do?

#### Create a new business area

Use this button to create a new business area.

#### Open an existing business area

Use this button to open an existing business area. When you have selected a business area from the list, click Finish to open the business area.

If you choose **Create a new business area**, the following options are displayed:

#### Where do you want to load the metadata from?

##### On-line dictionary

Use this radio button to load tables and views from the Oracle dictionary.

##### Gateway

Use this radio button to load tables and views from the data source you specify in this text box. Use the drop down list to select from available data sources.

For information about loading a business area from the gateway see [Chapter 4](#), ["How to create a business area using the Load Wizard"](#).

If you choose **Open an existing business area**, Discoverer displays the following options:

### Select one or more business areas to open

Use this list to select one or more business areas and click OK. Use the Select all and Clear All buttons to help you select which business areas to open.

### Notes

- The Load Wizard is displayed automatically when you connect to Discoverer Administrator, or when you connect to an EUL and choose File | New.
- The Gateway option is only available when you are using Oracle Designer or have a registered EUL Gateway and all its tables are visible (For information about setting up an EUL Gateway see [Chapter 3, "What is the EUL Gateway?"](#)). If you are using Oracle Designer, the drop down list displays the Oracle Designer work areas to which you have access (if you are using a version of Oracle Designer prior to Oracle Designer 6i, the drop down list simply displays 'Oracle Designer repository').
- If you are loading data from Oracle Designer 6i (where versioning is switched on), create a work area containing the set of object versions you want to load. We recommend that the work area rules are based on a configuration which defines a coherent release set of objects. It is important to make sure that no foreign key definitions within the work area reference tables/views outside the work area. To validate the work area is complete, use the Oracle Designer 'List External Reference' utility.
- If versioning (Oracle Designer 6i) is not switched on then there will only be one default work area 'Global Shared Work area' containing all the objects, and this must be used.

## Load Wizard: Step 2 dialog

Use this dialog to define which objects you want to load into the new business area. Your choices depend on where you choose to get your metadata.

For more information, see:

["What is the Load Wizard?"](#)

["How to create a business area using the Load Wizard"](#)

### **Select a database link**

Use this drop down list to specify which database to use as the data source.

**Note:** A database link sets a connection from one database to another. Multiple links can be set within a database. These links are created in the database - see your Database Administrator for more information.

### **Select the users you want to load [for loading meta data from an online dictionary]**

Use this list box to choose one or more users from the data source selected. Use the Select All and Clear All buttons to help you select the users.

### **Select the schemas you want to load [for loading meta data from a gateway]**

Use this list to select schemas (object owners) whose objects can be loaded from the database link named in the text box. Click the appropriate check boxes.

### **Load user objects that match**

Use this field to enter Oracle wildcard characters to find objects to load. This is helpful if you do not remember the names of the tables you want to load. By default all objects owned by the userid you selected will be loaded (% in the text box).

For further information about wildcards see ["Loading from the online dictionary"](#)

## Load Wizard: Step 3 dialog

Use this dialog to select the schema objects that you want to load into the business area.

For more information, see:

["What is the Load Wizard?"](#)

["How to create a business area using the Load Wizard"](#)

### Available

This list contains all schema objects (tables and views) available for inclusion in the business area. Select one or more schema objects and move them to the Selected list.

### Selected

This list contains all tables and views that you have selected to be included into the business area. Each table and view that you select will be a folder in the business area.

### Notes

- You can select more than one schema object by pressing the Ctrl key and clicking another schema object.
- The selections made in the Load Wizard: Step 2 dialog determined the objects that are now available in Step 3. If you want to change any of those selections (i.e. the database link, user IDs, or tables you specified if you used the online dictionary options), click Back to return to the Load Wizard: Step 2 dialog.

## Load Wizard: Step 4 dialog

Use this dialog to configure the joins and additional objects that are generated when data is loaded into the business area.

For more information, see:

["What is the Load Wizard?"](#)

["How to create a business area using the Load Wizard"](#)

### Do you want to create joins?

If you choose the option to Create Joins by Matching Column Names, Discoverer needs to check every column name of every object being loaded with every other column name. As the number of columns being loaded increases this obviously increases the processing required. As a side effect of this method, any joins that are created will need to be checked after the load to ensure they are valid. The master-detail relationship needs to be verified that it is the correct way round, and the join condition itself needs to be verified that it is valid (i.e. not created accidentally by two completely different columns having the same name.)

### Yes, create joins from:

Use this check box to create joins on items in the business area.

- Primary/foreign key constraints

Use this radio button to create joins on primary and foreign keys. This option is recommended if primary and foreign key constraints are defined in the database.

It is recommended whenever possible to select this option within Discoverer. Using this option, joins are only loaded from the constraints held within DBMS, which is a rapid process. It also creates joins that are always correct (i.e. the master and detail relationship is specified the right way round).

For example, if Regions contain many Stores, the primary key Region.Region Name might be joined to the foreign key Stores.Region Name.

- Matching column names

Use this radio button to create joins on matching column names in the database tables. You use this option when no primary and foreign key constraints are defined, for example, if you are using a non-Oracle database.

If you choose this option, Discoverer needs to check every column name of every object being loaded with every other column name. As the number of columns being loaded increases this obviously increases the processing required. As a side effect of this method, any joins that are created will need to be checked after the load to ensure they are valid. The master-detail relationship needs to be verified that it is the correct way round, and the join condition itself needs to be verified that it is valid (i.e. not created accidentally by two completely different columns having the same name).

## **What additional objects do you want to generate?**

### **Summaries based on folders that are created**

Use this check box to use automated summary management (ASM) to create summaries after the load process, based on folders that are created.

ASM attempts to create a set of suitable summaries after analyzing the table structure. Selecting this option may slightly increase duration of the bulk load, but should give your users improved query performance.

**Note:** Do not select this option if you are going to run Automated Summary Management, or if your database space is low.

### **Date hierarchies, using**

Use this check box to automatically create date hierarchies for date items. Select a hierarchy from the list of default date hierarchy formats provided in the drop down menu. The date hierarchy is applied to all date columns in the business area. Creating a date hierarchy enables users to drill up/down through date items. For example, from years to quarters or from months to days.

Automatically generating date hierarchies inserts additional (calculated) items into the folder. That is, an extra item is created for every date item in each node in the date hierarchy. For example a date hierarchy containing year | quarter | month | day applied to a table with three date columns generates an additional 12 items in the folder. For more information, see [Chapter 13, "Creating and maintaining hierarchies"](#).

### **Default aggregate on data points**

Use this check box to specify a default aggregate for numeric items. Then choose an aggregate from the drop down list below. The default is SUM.



## List of values for items of type

Use this check box to generate lists of values based on the types you select. This option automatically creates lists of values for each axis item of each type specified, except character items longer than 40 characters. The values are derived from the values in the database column.

## Notes

- Items are loaded as data points if they are DECIMALS (that is, a NUMBER data type) and have a non-zero precision. Integer numbers, all keys, and all other data types are loaded as axis items, with a default position of “Top.”
- In Discoverer Plus, whether an item is an axis item or datapoint affects the items’ default placement on cross tab worksheets, as follows:
  - Data points are shown with easy to pick aggregate functions and appear by default in the center of cross tabular reports, because they are usually numbers that users want to analyze. Another term for data points is *measures*.
  - Axis items can have visible lists of values; data points do not have visible lists of values. Axis items appear on the page, top, or side of cross tab reports by default. Another term for axis items is *dimensions*.
  - Whether an item is designated as an axis item or a data point ONLY affects its default position on a new sheet in Discoverer Plus. The position can always be changed by a user and the default position can always be changed by a Discoverer manager.
- List of values are derived by querying the database when Discoverer users click the + symbol next to the item. Lists are dynamic and change if the values in the database change. When + is clicked, the values are cached locally on the client for performance reasons, unless the **Cache list of values during each connection** check box is cleared when either creating or editing an item class in the following dialogs:
  - Item Class Wizard: Step 4 dialog
  - Edit Item Class dialog: Options tab
- Avoid creating lists of values on columns that will contain many values (e.g. decimals).

For more information, see ["Item Class Wizard: Advanced options for list of values dialog"](#).

If the **Cache list of values during each connection** check box is selected and you want to display new values in a list, you must reconnect.

## Load Wizard: Step 5 dialog

Use this dialog to enter a name and description for the business area and to configure how data is loaded into the business area.

For more information, see:

["What is the Load Wizard?"](#)

["How to create a business area using the Load Wizard"](#)

### **What do you want to name this business area?**

Use this field to enter a name for your business area. Use a short name that reflects the business function of the business area. For example, Web Usage Analysis.

### **What Description do you want for this business area?**

Use this field to enter a description for your new business area. Use this field to provide additional information about the business area, such as who created it, the intended audience, or more specific details about its scope.

### **How do you want to generate object names?**

#### **Capitalize names**

Use this check box to capitalize the first letter of folder and item names. For example, REGION\_NAME is converted to Region\_Name. This is useful because table names are usually in uppercase text in the database.

#### **Replace all underscores with spaces**

Use this check box to replaces underscores with spaces. For example, Region\_Name is converted to Region Name.

#### **Remove all column prefixes**

Use this check box to removes prefix characters that are common to all columns. For example, if a table name is EMP and its column names are EMP\_Number, EMP\_Name, and EMP\_Address, the corresponding names in the business area become Number, Name, and Address.

## Which objects do you want to sort?

### Sort Folders

Use this check box to sort folders alphabetically within a business area.

### Sort Items

Use this check box to sort items alphabetically within a folder.

For information about using the command line interface to sort folders and items during bulk load, see [Chapter 21, "/load"](#).

For information about sorting folders and items in a business area, see:

- [Chapter 5, "How to sort folders in a business area"](#)
- [Chapter 5, "How to sort items in a folder"](#)

## Manage Folders dialog: Business Area > Folder tab

Use this tab to assign multiple folders to a single business area. For example, to add a new folder to the current business area.

For more information, see:

["What are folders?"](#)

### **Business Area**

Use this drop down list to select a business area. The Current Folders list displays folders currently assigned to this business area.

### **Available Folders**

This list displays available folders not currently assigned to the business area selected. Orphan folders are also shown in the list.

- To assign folders to the current business area, select one or more folders, then click '>' to move them to the Current Folders list.

### **Current Folders**

This list displays folders currently assigned to the business area.

- To remove folders from the current business area, select one or more folders, then click '<' to remove them from the Current Folders list.

### **Notes**

You can select more than one folder by pressing the Ctrl key and clicking another folder.

## Manage Folders dialog: Folder > Business Area tab

Use this tab to assign single folders to a business area. For example, to assign a new folder to a business area.

For more information, see:

["What are folders?"](#)

### Folder

Use this drop down list to select the folder that you want to assign. The Current business areas list displays business areas to which the current folder is assigned.

If you select a folder that is not assigned to any business area, the folder is an orphan folder.

### Available business areas

All of the business areas available to share the folder definition.

This list displays available business areas to which you can assign the current folder.

- To assign the current folder to a business area, select one or more business areas, then click '>' to move them to the Current business areas list.

### Current business areas

This list displays business areas to which the current folder is assigned.

- To remove the current folder from a business area, select one or more business areas, then click '<' to move them to the Available business areas list.

### Notes

You can select more than one business area by pressing the Ctrl key and clicking business area.

## Manage Scheduled Workbooks dialog

Use this dialog to monitor and maintain workbooks that Discoverer end users have scheduled. For example, you might want to check on the progress of a workbook being processed, or to remove a scheduled workbook that was created by a Discoverer end user but is no longer required.

For more information, see:

["What are workbooks and scheduled workbooks?"](#)

### Show workbooks for

Use this drop down list to select the user or role whose scheduled workbooks you want to view or edit.

### Scheduled Workbooks

This list contains the scheduled workbooks that are owned by the selected user or role. The workbooks listed are either scheduled to run or have already run and are ready to use. The list contains the following fields:

- User  
The name of the Discoverer user who scheduled the workbook.
- Name  
The name of the scheduled workbook.
- Status  
The status of the workbook. Refer to the Status table below for details about the status of a workbook.

Status	Description:
Scheduled	This workbook has been scheduled and will run at the specified date and time.
Running Query	This workbook is currently running. No results are available.
Could not schedule	This workbook was not successfully submitted to the processing job queue. It is a good idea to let the Discoverer end user know so they can attempt to reschedule this workbook.

Status	Description:
Error while running query	There was an error when this workbook was run. No results were returned from the database. This could be due to a problem in the PL/SQL generation or execution. An Oracle database error is generated here and can be accessed by the database administrator. If part of a scheduled workbook fails (i.e. one sheet out of the workbook), the entire scheduled workbook run fails.
Report deleted by Administrator	The Discoverer manager has set the scheduled workbook for deletion. Report runs with this status are deleted when the user next disconnects from the EUL.
EUL has changed, reschedule report	A change has occurred in the EUL which affects the scheduled workbook. For example, if a folder has been deleted. The user can resubmit the scheduled workbook.
Number of Rows Limit exceeded	The results of this scheduled workbook return more rows than this user is allowed to retrieve. The results have been deleted. Use the " <a href="#">Privileges dialog: Query Governor tab</a> " to change this limit.
Report Expired	The expiration date has passed. This workbook is no longer available. Reports with this status are deleted when the user disconnects from the EUL.
Report Ready	This workbook successfully queried the database and users can view the results.

- **Date**

The date on which the workbook is next scheduled to run (if the workbook's status is Scheduled) or when the workbook was last run (if the workbook's status is Report Ready).
- **Time**

The time at which the workbook is next scheduled to run (if the status is Scheduled) or was last run (if the status is Report Ready).
- **Run time**

The length of time this workbook took to run.



**Description**

This read only field displays any additional information about the selected workbook.

**Edit**

Use this button to display the "[Schedule Workbooks dialog: General tab](#)", where you change the settings for the selected workbook. This option is only available for workbooks that have not yet been processed.

**View Error**

Use this button to see a description of why a selected workbook could not be run successfully. This option is only available for workbooks that could not be scheduled due to an error.

**Unschedule/Delete**

Use this button to un-schedule the workbook and remove the workbook from the Scheduled Workbooks list. Any workbooks resulting from previous runs of this workbook are deleted.

**Refresh**

Use this button to check the database for any changes to the schedule since you opened this dialog.

**Notes**

You can re-sort the Scheduled Workbooks list by clicking the column you want to sort by. For example, if you want the list sorted by date, click the Date column header.

## Name hierarchy dialog

Use this dialog to enter a name and description for a hierarchy.

This dialog is also displayed as:

Hierarchy Wizard: Step 3

Hierarchy Wizard: Step 4

Edit Hierarchy dialog: Name tab

For more information, see:

["What are hierarchies?"](#)

### **Hierarchy Name**

Use this field to enter a name for the hierarchy.

### **Hierarchy Description**

Use this field to enter additional information about the hierarchy.

## Name Summary Folder dialog

Use this dialog to enter a name and description for a summary folder. For summary folders based on summary tables or materialized views, you can also configure when to build the summary folder. For example, you might want to build a summary folder immediately.

This dialog is also displayed as:

Summary Wizard: Step 5

Summary Wizard: Step 6

Summary Wizard: Step 7

Edit Summary dialog: General tab

For more information, see:

["About folders and summary folders in Discoverer"](#)

["What is manual summary folder creation?"](#)

### For summary folders based on summary tables or materialized views

Here you can name a summary folder and schedule its build times.

#### Provide a name and description for this summary folder

##### Name

Use this field to enter a name for the summary folder. Discoverer Administrator creates a default name for you that you can use.

##### Description

(Optional) Use this field to enter additional information about the summary folder.

#### When would you like to build this summary folder?

##### Build immediately

Use the **Build immediately** radio button if you have smaller summary tables, or if you want to build the summary folder immediately.

**Build at (Date, Time)**

Use the **Build at** radio button if you have larger summary tables that are best built at off-peak hours. Enter the time and date you want to build the summary folder.

**For summary folders based on external summary tables**

Here you can name the summary folder and provide a description.

**Provide a name and description for this summary folder**

**Name**

Use this field to enter a name for the summary folder. Discoverer Administrator creates a default name for you that you can use.

**Description**

(optional) Use this field to enter additional information about the summary folder.

## New Condition dialog (Advanced)

Use this dialog to create a new condition for use in the business area.

For more information, see:

["What are conditions?"](#)

["What are the different types of condition?"](#)

["How to create simple conditions"](#)

["How to create advanced conditions"](#)

Advanced conditions contain multiple criteria. For example:

- to restrict Discoverer end users to data for the year 2001 in the first quarter, you might create a mandatory condition here: Year = 2001 AND Quarter = Q1. When they access workbooks, Discoverer end users will always see data for the year 2001 in the first quarter.
- to enable Discoverer end users to easily look at data for different quarters in the year 2001, you might create the optional conditions:
  - Year = 2001 AND Quarter = Q1
  - Year = 2001 AND Quarter = Q2
  - Year = 2001 AND Quarter = Q3
  - Year = 2001 AND Quarter = Q4

When they access workbooks, Discoverer end users will be able to focus on data for particular quarters in the year 2001 by applying these conditions.

### Name

Use this field to enter a name for the new condition.

### Generate name automatically

Click this check box if you want Discoverer to create a name for you.

### Description

Use this field to enter additional information about the condition. This description is displayed when you select this condition in the work area, and in Discoverer Plus. Make your description useful to both you and your users.

### **Location**

This field displays the name for folder that will store the condition. This is the location you selected when you chose Insert | Condition.

### **Type**

Use this drop down list to choose the condition type:

- **Mandatory** - mandatory conditions are always applied to a worksheet that contains one or more items from the folder that contains the condition. Discoverer Plus users are not notified of mandatory conditions and can not turn them off.
- **Optional** - optional conditions can be turned on or off as required by Discoverer Plus users.

### **Formula**

Use this box to specify the filter criterion that you want to use.

- **Item**

Use this drop down list to choose what item you want to filter the data on. For example, choose Year here if you want to display data for a particular year.

- **Condition**

Use this drop down list to choose how to match data against the item. For example, choose the '>' symbol (greater than) here to filter data where the item value is greater than a particular number.

- **Values**

Use this box to define what data you want to match against. For example, enter 2001 here to look only at data for the year 2001. If you created a list of values for the item, these items appear in the drop down list.

### **Match case**

Use this check box to match upper and lower case text data exactly. When selected, the match value 'New York' would not return data for 'new york'.

**Add**

Use this button to insert a new criterion line to the condition. By default, the new item is grouped with a logical AND, which means that data must match all criteria contained within the AND group.

**Delete**

Use this button to remove the currently selected filter criterion from the condition.

**And**

Use this button to insert a new criterion line to the condition. The new item is grouped with a logical AND, which means that data must match all criteria contained within the AND group.

**Or**

Use this button to insert a new criterion line to the condition. The new item is grouped with a logical OR, which means that data must match at least one of the criteria contained within the OR group.

**Not**

Use this button to invert the condition for the currently selected group. The item is grouped with a logical NOT AND or NOT OR, which means that data must *not* match the criteria contained within the NOT group.

**Notes**

The buttons Delete, And, and Or are only available if you have selected a criteria in the Formula display.

## New Condition dialog (Choose object for)

Use this dialog to choose where you want to store the new condition.

For more information, see:

["What are conditions?"](#)

["What are the different types of condition?"](#)

["How to create simple conditions"](#)

["How to create advanced conditions"](#)

For example, if you do not select a folder before choosing Insert | Condition, you select a folder here.

The Choose Folder window may appear in any of the following cases:

- The currently selected folder does not use the condition you are about to create.
- No folder is selected on the Join Manager window and you click Change folder in the drop down list.

### **Business area**

Use this drop down list to select a business area. Then, choose the folder in which to store the condition from the expandable item list below.



## New/Edit Condition dialog

Use this dialog to create a new condition, or edit a condition in the business area.

This dialog is also displayed as:

New Condition dialog

Edit Condition dialog

For more information, see:

["What are conditions?"](#)

["What are the different types of condition?"](#)

["How to create simple conditions"](#)

["How to create advanced conditions"](#)

Simple conditions typically contain one filter criterion. For example:

- to restrict Discoverer end users to data for the year 2001, you might create a mandatory condition here: Year = 2001. When they access workbooks, Discoverer end users will always see data for the year 2001.
- to enable Discoverer end users to easily look at data for different quarters, you might create the optional conditions: Quarter = Q1, Quarter = Q2, Quarter = Q3, and Quarter = Q4. When they access workbooks, Discoverer end users will be able to focus on data for particular quarters by applying these conditions.

### **Name**

Use this field to enter a name for the new condition.

### **Generate name automatically**

Click this check box if you want Discoverer to create a name for you.

### **Description**

Use this field to enter additional information about the condition. This description is displayed when you select this condition in the work area, and in Discoverer Plus. Make your description useful to both you and your users.

## Location

This field displays the name for folder that will store the condition. This is the location you selected when you chose Insert | Condition.

## Type

Use this drop down list to choose the condition type:

- **Mandatory** - mandatory conditions are always applied to a worksheet that contains one or more items from the folder that contains the condition. Discoverer Plus users are not notified of mandatory conditions and can not turn them off.
- **Optional** - optional conditions can be turned on or off as required by Discoverer Plus users.

## Formula

Use this box to specify the filter criterion that you want to use.

- **Item**

Use this drop down list to choose what item you want to filter the data on. For example, choose Year here if you want to display data for a particular year.

- **Condition**

Use this drop down list to choose how to match data against the item. For example, choose the '>' symbol (greater than) here to filter data where the item value is greater than a particular number.

- **Values**

Use this box to define what data you want to match against. For example, enter 2001 here to look only at data for the year 2001. If you created a list of values for the item, these items appear in the drop down list.

You can also click the drop down list and match against the following:

- Click **Select Multiple Values** to display the Values dialog.  
You select one or more values to use in the condition.
- Click **Create Calculation** to display the Edit Calculation dialog.  
You create a calculation to use in the condition.
- Click **Select Item** to display the Items dialog.

You select an item to use in the condition.

**Match case**

Use this check box to match upper and lower case text data exactly. When selected, the match value 'New York' would not return data for 'new york'.

**Advanced**

Use this button when you want to create more than one filter criterion. Here, you display additional fields and buttons used to create advanced conditions (see "[New Condition dialog \(Advanced\)](#)").

## New Date Format dialog

Use this dialog to create a new date format. For example, you might want to create a new format for Year containing the last two digits only of a typical four digit year: e.g. display 01 for 2001, display 02 for 2002 and so on.

You can use the new format in date hierarchies.

For more information, see:

["What are date hierarchies?"](#)

["What are date items?"](#)

["What are date format masks?"](#)

### Date format group

Use this drop down list to choose the group in which you want the new date format to be included.

### New Format

Use this field to enter the date format mask that you want to use. For example, Mon-YYYY to display the month plus the four digits of the year.

### Notes

- A new date format must conform to the SQL Date Format Model, for example YYYY, YYY, YY, RR etc.
- You can prefix a new Date Format with descriptive text inside "quotes" (E.g. "Fiscal Year" YYYY ).

## New Item dialog (Choose Folder for Item)

Use this dialog to choose where you want to store the new item. For example, if you do not select a folder before choosing Insert | Item, you select a folder here.

Discoverer displays the Choose Folder dialog when:

- The currently selected folder does not use the item that you are about to create.

This dialog is also displayed as:

New Item dialog

For more information, see:

["What are items?"](#)

["What are folders?"](#)

### **Business area**

Use this drop down list to select a business area. Then, choose the folder in which to store the item from the expandable item list below.

## New Item dialog

Use this window to create items based on EUL objects and/or functions.

For more information, see:

["What are items?"](#)

["What are calculated items?"](#)

For example:

- to create an item named Year based on the EUL item Calendar Year
- to create a calculated item named Sales Target based on the formula  $\text{Sales SUM} * 1.25$
- to create a calculated item named Profit based on the formula  $\text{Sales SUM} - \text{Profit SUM}$
- to create a calculated item named Rank Sales based on the formula  $\text{RANK () OVER (ORDER BY Sales SUM)}$

### Show

Use this drop down list to display items and functions available. To include items or functions in the calculation, add them to the calculation box on the right.

### Paste

Use this button to add the item or functions currently selected in the Show list to the Calculation box to the right.

### Name

Use this field to enter a name for the item or calculation. Discoverer Administrator creates a default name for you.

### Calculation

Use this text box to enter the item or calculation details.

- To create an item based on an item in the business area, select an item from the Show list. Then click Paste to add the item to the calculation box.
- To create a calculation, you can either:
  - Enter the formula directly into the Calculation box.

- Paste items from the Show box on the left into your calculation.
- Click the operator buttons underneath the Calculation box to use them in the calculation.
- Use a combination of the above options.

### Operator buttons ([+] [-] [x] [/] [%] [(] [)])

Use these buttons to add operators to the calculation. Operators are copied into the Calculation box above.

### OK

Use this button to validate the calculation and save the item.

- If the calculation has valid syntax, the calculation is saved and displayed in the Calculations dialog.
- If the calculation has invalid syntax, an error message is displayed. You must correct any syntax errors before you can save the calculation.

### Notes

- When you use arithmetic expressions in a calculation, the multiply and divide operators are executed first, regardless of their position in the calculation. If you have more than one operator of the same precedence, they are evaluated from left to right. For example, the calculation Price – Discount \* Quantity is evaluated as Discount\*Quantity subtracted from Price. If you use parentheses around the subtraction expression (Price – Discount), the subtraction is executed before the multiplication.
- Functions Available

Category	Description
All Functions	An alphabetical list of all functions.
Conversion	Converting from one data type to another, such as: RAWTOHEX, TO_CHAR, TO_DATE
Database	Optional category that is displayed when user defined functions are available (created using the Register PL/SQL Functions facility on the Tools menu)

<b>Category</b>	<b>Description</b>
Date	Manipulating date items such as ADD_MONTHS, NEW_TIME, SYSDATE and NEXTDATE
Group	Aggregate and statistical functions including SUM, COUNT, MAX, MIN, VARIANCE
Numeric	Numeric items, transcendentals and floating point such as COS, LOG, MOD, POWER
Others	Miscellaneous functions such as LEAST, USER, DECODE, ROWNUM
String	Character items, text operations such as INITCAP, LPAD, NLS_UPPER
Analytic	Advanced statistical analysis, such as RANK, NTILE, CORR



## New Join dialog (Choose folder)

Use this dialog to choose where you want to store the new join. For example, if you do not select a folder before choosing Insert | Join, you select a folder here.

The Choose Folder window may appear in any of the following cases:

- The currently selected folder does not use the join you are about to create.
- No folder is selected on the Join Manager window and you click Change folder in the drop down list.

This dialog is also displayed as:

New Join dialog

For more information, see:

["What are joins?"](#)

["What are business areas?"](#)

### **Business area**

Use this drop down list to select a business area. Then, choose the folder in which to store the join from the expandable item list below.

## New Join/Edit Join dialog

Use this dialog to create a new join, or edit an existing join.

This dialog is also displayed as:

New Join dialog

Edit Join dialog

For example, to display information from both the Product folder and the Sales Facts folder, you might create the following join on the shared field Product Key:

Products.Product Key = Sales Facts.Product Key

For each record in the Sales Facts folder, this would allow you to display information about the product being sold that is stored in the Product folder, not in the Sales Fact folder. For example, description, price, and storage location.

For more information, see:

["What are joins?"](#)

### Master folder

Use this drop down field to select the item in the master folder that you want to join. Fields are prefixed with the folder name, for example Products.Product Key.

- Choose 'More items' to display the ["New Join dialog \(Choose folder\)"](#), where you can select an item from anywhere in the EUL.

### Operator

Use this drop-down list to select how you want to match the two items. For example, choose '=' to find an exact match between two items. For more information, see the list of join operators below.

**Table 25–3 Join Operators**

Operator	Description
=	equijoin, combining rows that have equivalent values for specified items
< >	not equal
<	less than
<=	less than or equal
>=	greater than or equal

**Table 25–3 Join Operators**

Operator	Description
>	greater than

### Detail Folder

Use this drop down field to select the item in the detail folder that you want to join. The detail item can be in a folder in either the same business area as the master item, or in a folder in a different business area. Fields are prefixed with the folder name, for example Sales Facts.Product Key.

- Choose 'More items' to display the "[New Join dialog \(Choose folder\)](#)", where you can select an item from anywhere in the EUL.

### Name

Use this field to enter the name of the join. This name is displayed in the Discoverer Administrator Workarea, and is used by Discoverer end users when they use workbooks.

### Description

Use this field to enter additional information about the join. This description is displayed in the Discoverer Administrator work area, and is used by Discoverer end users when they use workbooks.

### Multi-item

Use this button when you want to create more than one join criterion. Here, you display additional fields and buttons used to create multi-item joins (see "[New Multi-Item Join dialog](#)").

### Options

Use this button to display the "[Join Options dialog](#)", where you configure outer joins.

### Master to Detail



This icon represents the one-to-many relationship between the two items in different folders in the master to detail join relationship. The master item is on left and the detail item is on the right.

### **Detail to Master**



This icon represents the many-to-one relationship between the two items in different folders in the detail to master join relationship. The detail item is on the left and the master item is on the right.

For more information, see [Chapter 10, "How to edit joins"](#).

## New Multi-Item Join dialog

Use this dialog to create a new multi-item join, or edit an existing multi-item join. A multi-item join enables you use two or more join conditions to join two folders where there are no common items. The join becomes true when all the conditions of the join are met. For example, two folders (Emp folder and Salgrade) do not share the common items needed to create a single item join. The following multi-item join example becomes true (i.e. it joins the Emp folder to the Salgrade folder) for an employee when their salary falls within the specified salary band:

Emp.Sal >= Salgrade.LoSal

Emp.Sal <= Salgrade.HiSal

For each salary record in the Emp folder (where the salary is between lowest and the highest salary), Discoverer can display salary grade information about the employee from the Salgrade folder.

For more information, see:

["What are joins?"](#)

["How to create single item joins"](#)

["How to create multi-item joins"](#)

### Master folder

Use this drop down field to select the item in the master folder that you want to join. Fields are prefixed with the folder name, for example Products.Product Key.

- Choose **More items** to display the ["New Join dialog \(Choose folder\)"](#), where you can select an item from anywhere in the EUL.

### Operator

Use this drop down list to select how you want to match the two items. For example, choose '=' to find an exact match between two items (see Join Operators under the Notes heading below).

### Detail Folder

Use this drop down list to select the item in the detail folder that you want to join. The detail item can be in a folder in either the same business area as the master item, or in a folder in a different business area. Fields are prefixed with the folder name. For example, Sales Facts.Product Key.

- Choose **More items** to display the "[New Join dialog \(Choose folder\)](#)", where you can select an item from anywhere in the EUL.

### **Name**

Use this field to enter the name of the join. This name is displayed in the Discoverer Administrator work area, and is used by Discoverer end users when they use workbooks.

### **Description**

Use this field to enter additional information about the join. This description is displayed in the Discoverer Administrator Workarea, and is used by Discoverer end users when they use workbooks.

### **Add**

Use this button to add a join criterion line to the join. Here, you can create more complex joins by selecting another master folder, operator, and detail folder.

### **Delete**

Use this button to remove the currently selected join criterion from the join.

### **Options**

Use this button to display the "[Join Options dialog](#)", where you configure outer joins.

### **Notes**

*Table 25–4 Join Operators*

<b>Operator</b>	<b>Description</b>
=	equijoin, combining rows that have equivalent values for specified items
< >	not equal
<	less than
<=	less than or equal
>=	greater than or equal
>	greater than

## Online Dictionary Options dialog

Use this dialog to specify what types of tables and views you want to see in the ["Load Wizard: Step 2 dialog"](#). For example, you can display all tables and views accessible to a user, not just those owned by a user.

For more information, see:

["What is the Load Wizard?"](#)

### Which tables (and views) do you want to see?

#### Tables owned by user

Use this radio button to make available tables and views that belong to the user IDs specified in ["Load Wizard: Step 2 dialog"](#).

Choose this option:

- When you have a schema, and you want to load tables or objects based on the schema permissions.
- When you have a schema owner, and you want to load tables or objects based on the schema grants. For example, an owner such as FINAPPS, who owns all of the data tables used by the Financial Applications system and has granted access rights to other users to view those tables.

#### Tables accessible by user

Use this radio button to make available tables and views to which the user IDs have been granted SELECT access in the database.

### What types of tables (and views) do you want to see?

#### Public Tables

This option imports tables and views in the selected user IDs' schema that have been granted public access. For example, JOE is seeing publicly accessible tables.

#### Partially restricted tables

This option imports the tables and views in the selected user IDs' schema that have also been granted some access to another user ID. For example, user ID Bob could

grant SELECT privileges on Table D in the database to user ID Betty. Table D would be designated as a partial access object. Use this option to display a list of partial access objects that are either owned by a user ID or objects to which the user ID has been given explicit SELECT access. For example, JOE has been granted specific access to these tables.

### **Private tables**

This option imports the tables and views in the selected user IDs' schema that are not accessible by any other user ID.

### **Notes**

A user ID can own tables and also grant access to other user IDs. For example, an application owner, such as FINAPPS, owns all of the data tables used by the Financial Applications system and has granted access rights to other users to view those tables.



## Open Business Area dialog

Use this dialog to specify which business areas you want to open in the Discoverer Administrator Workarea. For example, you might want to work with your own business area and the Video Stores Tutorial business area.

For more information, see:

["What are business areas?"](#)

["Loading from the online dictionary"](#)

["Loading from a Gateway"](#)

### Available

This list contains business areas available. To open business areas, move business areas from the Available list to the Selected list.

### Selected

This list contains the business areas that will open in the work area. If you do not want to open business areas in this list, move these business areas from the Selected list to the Available list.

### Notes

- You can select more than one business area by pressing the Ctrl key and clicking another business area.
- You cannot open the same business area twice. If you select a business area that is already open in a work area window, the Open command will have no effect. To see another view of the same business area, choose New Window from the Window menu to create another work area window.

## Options dialog: Default EUL tab

This dialog enables you to specify what default EUL you connect to.

For more information, see:

["How to start Discoverer Administrator"](#)

["Options dialog: Connection tab"](#)

### Which EUL would you like as your default?

#### Select a default EUL

Use this list to specify which EUL you want to use by default. When you next connect to Discoverer Administrator, the Load Wizard will display business areas in the EUL that you specify here.

#### Notes

- If you want to create EULs, make sure that you have write access to the default EUL. Otherwise, the Create business area option will not be available on the Load Wizard.

## Options dialog: Connection tab

This dialog enables you to specify what connection details you display on the "Connect dialog". For example, if you always connect to Oracle Applications EULs, you might configure the Connect dialog to prompt you to enter Oracle Applications connection details.

For more information, see:

["How to start Discoverer Administrator"](#)

["Options dialog: Default EUL tab"](#)

### Connection tab

#### What type of EULs would you like to connect to?

##### **Connect to standard EULs**

Use this radio button when you only want to connect to standard EULs.

The Oracle Applications User check box will not be displayed in the Connect dialog.

##### **Connect to applications EULs**

Use this radio button if you only want to connect to Oracle Applications EULs.

The Oracle Applications User check box will not be displayed in the Connect dialog, but you need to login using your Applications user ID and Responsibility and you can login to Oracle Applications EULs only.

##### **Connect to both standard and applications EULs**

Use this radio button when you want to be able to connect to both standard and Oracle Applications EULs.

The Oracle Applications User check box is displayed in the Connect dialog to allow you to specify what type of connection details you are connecting with.

##### **Applications EUL Settings**

Use these fields with an Oracle Applications EUL. Discoverer uses default values for both these fields if you do not enter any values.

**Gateway User ID (GWYUID) / password**

Use this field to define the user name and password of the public Gateway used in the Applications Login. Separate the user name and password using a slash (/) character.

Enter a Gateway User ID when you want to override the default values (APPLSYSPUB/PUB) that Discoverer uses.

**Foundation Name (FNDNAM)**

Use this field to define the schema that owns the core Applications tables and views.

Enter a Foundation Name when you want to override the default value (APPS) that Discoverer uses.

## PL/SQL Functions dialog: Arguments tab

Use this dialog to define arguments for PL/SQL functions that are registered.

You can register PL/SQL functions that have been defined in the database, using SQL commands.

For more information, see:

["Why do you need PL/SQL functions?"](#)

### Functions tab

Use this tab to display the ["PL/SQL Functions dialog: Functions tab"](#).

### Functions

This list displays a Oracle-supplied PL/SQL functions and user-defined PL/SQL functions that have already been registered for use with Discoverer Administrator.

### Arguments

This displays a list of arguments defined for the function currently selected in the Functions list.

### New

Use this button to create a new argument. A default argument name is generated and fields are initialized with default values. You can then edit the default values to configure the new argument as required.

### Delete

Use this button to delete the currently selected argument. The argument is removed from the Arguments list.

### Move Up/Move Down

Use these buttons to rearrange the arguments in the Arguments list. This is useful if an argument is out of place ordinally, or if the function itself has been modified and you need to update the function definition.

**Name**

Use this field to enter the argument name. When you add an argument, a default name is created by Discoverer Administrator.

**Description**

Use this field to enter additional information about the argument. When you add an argument, a default description is created by Discoverer Administrator.

**Data Type**

Use this field to specify the argument data type (the default is Number).

**Identifier**

Use this field to change the unique name that Discoverer uses to identify EUL and workbook objects. Also known as a conceptually identical object.

**Usage****Optional**

Use this radio button when the argument is an optional argument to the function.

**Required**

Use this radio button when the argument is a mandatory argument to the function.

## PL/SQL Functions dialog: Functions tab

Use this dialog to manage PL/SQL functions available to Discoverer Administrator. To register functions, you can:

- create your own PL/SQL functions manually (use the New option)
- import PL/SQL functions defined in the database (use the Import option)

For more information, see:

["Why do you need PL/SQL functions?"](#)

### Arguments tab

Use this tab to define arguments for the function that you are registering (for more information, see ["PL/SQL Functions dialog: Arguments tab"](#)).

### Functions

This displays a list of Oracle-supplied PL/SQL functions and user-defined PL/SQL functions that have already been registered for use with Discoverer Administrator. When the Available in Discoverer Plus check box is selected, these registered functions are also available to Discoverer end users for use in calculations.

### Attributes for <function selected in Functions list>

This box displays information about the selected PL/SQL function.

### Function Name

Use this field to enter a name for the function. The Function Name can be different from the Display Name.

### Display Name

Use this field to enter a name for the function. This name will be visible in the Discoverer Administrator in the Edit Calculation window, and in Discoverer Plus if the Available in Discoverer Plus check box has been selected.

### Owner

Use this field to enter the user ID of the owner of the function. Changing this value enables you to move the reference from a development environment to a live one.

### **Package**

Use this field to enter the package that contains this function. A package is used in the Oracle database to group many functions together by category for easier management.

### **Database Link**

Use this drop down list to select the database that stores the function. This is a particularly useful feature if you are using distributed databases.

### **Return Type**

Use this field to enter the data type of the data returned by the function. For example, a function might return a character string (char) or a number.

### **Description**

Use this field to enter additional information about the function.

### **Identifier**

Use this field to change the unique name that Discoverer uses to identify EUL and workbook objects. When matching objects common to different EULs, Discoverer uses Identifiers to locate objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

### **Available in Discoverer Plus**

Use this check box to enable Discoverer Plus end users to use this function in calculations.

### **Validate**

Use this button to test the validity and accuracy of the information you have entered. The Discoverer Administrator generates a test SQL statement that includes the PL/SQL function and tests the query. This test validates the existence of the function (by properly naming and locating it), its owner, and tests the data return type.

### **New**

Use this button to register a new PL/SQL function. A default function name is generated and fields are initialized with default values. You can then edit the default values to configure the new function as required.



**Delete**

Use this button to remove the PL/SQL function currently selected in the Functions list.

**Import**

Use this button to display the "[Import PL/SQL Functions dialog](#)", where you import PL/SQL functions defined in the database. Once you have imported PL/SQL functions, you register them so that Discoverer Administrator can use them.

## Privileges dialog: Privileges tab

Use this tab to grant privileges to users or roles (role is replaced with responsibility for Oracle Applications users). For example, to enable Discoverer Plus end users to create and edit queries, drill down, and drill out, but not allow them to save workbooks to the database.

For more information, see:

["About Discoverer and security"](#)

### Show privileges for

#### User

Use this check box to display users in the drop down list to the right.

#### Role

Use this check box to display roles in the drop down list to the right.

#### (Drop down user/role list)

User this drop down list to choose the user or role whose privileges you want to configure. For example, choose jchan to display the privileges for jchan in the Privilege box.

#### Privilege

Use the check boxes in this panel to grant or revoke privileges to the currently selected user or role.

- To grant Administration privileges, select the Administration check box, then select individual privileges in the Administration group.
- To grant User Edition privileges, select the User Edition check box, then select individual privileges in the User Edition group. These privileges apply to Discoverer Desktop and Discoverer Plus.

#### Description

This field displays a brief description about the currently selected privilege.

### Select a system profile

Use this drop down list to specify a system profile to apply to the user. This allows you to apply pre-defined sets of privileges to users and roles.

- System profiles are Oracle-specific.
- If you are using a non-Oracle database, this field is dimmed.

### Notes

- The roles label and the system profile field are unavailable if you are not using an Oracle database.
- If your current user ID does not have access to the table DBA\_ROLES (Oracle databases), only a subset of roles and responsibilities may be visible in the drop down list.
- Privilege types:

Privilege Name	Description
Administration	Granting this privilege, allows the user or role to log in to Discoverer Administrator. Note that to allow the user to access the features in Discoverer Administrator, you must select individual Administration features (privileges) in this list. This option must be selected in order to grant any of the privileges listed under Administration.
Format Business Area	Granting this privilege, allows the user or role to edit formatting information in an existing business area to which they have access. Such formatting information includes folders, joins, and items. Granting this privilege allows the user or role to specify names, descriptions, default format masks and placement.
Create/Edit Business Areas	Granting this privilege, allows the user or role to create and modify business areas, folders, joins, calculations, conditions, hierarchies and item classes.
Create Summaries	Granting this privilege, allows the user or role to build summary tables through Discoverer Administrator. Also requires database resource privileges.
Set Privilege	Granting this privilege, allows the user or role to maintain and modify user/role privileges using this dialog box.
Manage Schedule Workbooks	Granting this privilege, allows the user or role to monitor and maintain the schedule for scheduled workbooks.

<b>Privilege Name</b>	<b>Description</b>
Discoverer Plus	Granting this privilege, allows the user or role to log in to Discoverer Plus. Note that to allow the user to access the features in Discoverer Plus, you must select individual Discoverer Plus features (privileges) in this list. This option must be selected in order to grant any of the privileges listed under Discoverer Plus.
Create/Edit Query	Granting this privilege, allows the user or role to create new worksheets (queries) and modify existing ones. Without this privilege, the user can only open and run existing (predefined) workbooks and worksheets.
Collect Query Statistics	Granting this privilege, saves performance statistics when this user runs worksheets/workbooks (queries). This information is only saved if you have set up the Query Statistics feature. See your Administration Guide for details about this feature.
Item Drill	Granting this privilege, allows the user or role to drill to detail and related information in the worksheet. In addition to granting this privilege, you must create the drill using the Item Class wizard before the user will be able to use this function.
Drill Out	Granting this privilege, allows the user or role to launch another application to see related information by drilling on an item in the worksheet. In addition to granting this privilege, you must create the drill using the Item Class wizard before the user will be able to use this function.
Grant Workbook	Granting this privilege, allows the user or role to grant access to their workbooks so other users can run and view them.
Schedule Workbooks	Granting this privilege, allows the user or role to schedule a workbook to run at a later time and at regular intervals (i.e., daily, weekly, monthly).
Save Workbooks to Database	Granting this privilege, allows the user or role to save the workbooks they create in the database. By default, workbooks are saved on the user's hard drive.

---

## Privileges dialog: Query Governor tab

Use this tab to view and edit the query configuration for a specified user or role (role is replaced by responsibility for Oracle Applications users). For example, to limit the number of rows that can be retrieved for the user jchan.

For more information, see:

["Controlling access to information"](#)

### Show query limits for

#### User

Use this check box to display users in the drop down list to the right.

#### Role

Use this check box to display roles in the drop down list to the right.

The roles check box is only available when you are using an Oracle database.

#### (Drop down user/role list)

User this drop down list to choose the user or role whose query limits you want to configure. For example, choose jchan to display the query limit settings for jchan in the Query Governor area.

#### Warn user if predicted time exceeds \_ minutes

Use this field to display a warning to the Discoverer end user if a query takes longer than the amount of time specified.

This privilege is only available when using an Oracle database.

#### Prevent queries from running longer than \_minutes

Use this field to limit the query time for the selected user.

#### Limit retrieved data to \_rows

Use this field to limit the number of rows a users query may return. The limit you set here is a maximum. The end user can set a limit that is lower. When a query has reached the maximum number of records set by you or the end user, the query

stops and the data retrieved so far is returned to the end user. For example, if the check box is selected and the value 1000 is entered, only the first 1000 rows of a query are displayed on a Discoverer end user worksheet.

## Privileges dialog: Scheduled Workbooks tab

Use this tab to specify scheduled workbook settings for a specified user or role (role is replaced by responsibility for Oracle Applications users). For example, to limit the number of workbooks that a user can schedule, or to define the expiry date of scheduled workbooks.

For more information, see:

["Scheduling workbooks"](#)

["About Discoverer and security"](#)

### Show scheduling limits for

Use this drop down list to choose the user or role for which you want to specify scheduled workbook settings. For example, choose jchan to display the scheduled workbooks settings for jchan.

**Note:** If you select a user or role that does not have schedule workbook privileges, the configuration details are disabled. If you want the user or role to have this capability, see [Chapter 7, "How to specify a user or role \(responsibility\) to perform a specific task"](#):

### Select the user to own the results tables created in the database

Use this drop down list to select the user name of the database user that will own the scheduled workbooks tables.

### Require users to schedule workbooks

#### Always

Use this radio button when you want a Discoverer end user only to run queries using the scheduled workbooks facility.

#### Never

Use this radio button to enable users to choose whether or not they want to run queries using the scheduled workbooks facility.

**If predicted time exceeds**

Use this radio button when you want users to schedule workbooks if the predicted time to run the query exceeds the value specified in the Minutes field.

**Maximum limit of scheduled workbooks**

Use this check box to specify the maximum number of workbooks that a user can schedule. Use this option to control the use of the DBMS\_JOB queue and prevent system overload.

**Expire results after**

Use this check box to limit the lifetime of scheduled workbook results. Results due for deletion are deleted when the user disconnects from the EUL.

**Commit size**

Use this check box to specify the number of rows that are committed to the result table at a time, when Discoverer processes the scheduled workbook. On large result sets, server performance is improved by setting the commit size higher than the default.

**Query schedule must start between**

Use this check box to specify when a user can schedule workbooks. This could be exploited to prevent users from scheduling workbooks at peak times.



## Privileges dialog: User/Role tab

Use this tab to configure specific privileges for users and roles. For example:

- to look at which users and roles have Administration privileges
- to check that a group of roles have the Save Workbooks to Database privilege
- to revoke drill out privileges for specified users

Note that Oracle Applications users have responsibilities instead of users.

For more information, see:

["About Discoverer and security"](#)

### Show users/roles with privilege

User this drop down list to choose a privilege that you want to look at. For example, choose Save Workbooks to Database to display the users and roles that have this privilege in the Show list.

### Show

#### Users

Use this check box to look at user privileges.

#### Roles

Use this check box to look at role privileges. This option is only available when you are using an Oracle database.

### (Users/Roles List)

This list displays users and roles that have the currently selected privilege. This list is updated when you select a new privilege in the Show users/roles with privilege list.

- To grant a privilege, select the check box next to the user or role that requires the currently selected privilege.
- To revoke a privilege, clear the check box next to the user or role that does not require the currently selected privilege.

### **Privilege Description**

This box displays additional information about the currently selected privilege.

## Properties dialogs

Choose one of the following help topics:

["Business Area Properties dialog"](#)

["Condition Properties dialog"](#)

["Folder Properties dialog"](#)

["Item Properties dialog"](#)

["Join Properties dialog"](#)

["Summary Properties dialog"](#)

## Refresh Business Area dialog

Use this dialog to look at differences that have been found between the folders and items in the current business area and source tables in the database to which they link. For example, if a new primary key has been detected in the source database, you can use this dialog to correct this in the business area and continue the refresh. You can also assess the impact that changes will have on other objects in the business area.

For more information, see:

["Creating and maintaining business areas"](#)

["How to synchronize a business area with the database"](#)

### **Name**

This field displays the name of the item that is different.

### **Type**

This field displays the type of change that has occurred. For example, the source table has a new foreign key.

### **Actions**

This field displays the effect that completing the refresh will have on the object and the check box enables you to switch the action on or off.

### **OK**

Use this button to start the refresh using the options selected.

### **Impact**

Use this button to display the ["Impact dialog"](#). The Impact dialog displays a list of objects that will be affected or removed if you refresh this business area.

## Refresh Summaries dialog

Use this dialog to refresh the currently selected summary. For Oracle 8.1.7 databases (or later) you can also specify an incremental refresh if available (see Oracle 8i server documentation for conditions).

For more information about refreshing summary folders, see:

["How does ASM work?"](#)

["Why must you refresh summary data?"](#)

["What happens when a summary folder is refreshed?"](#)

### When would you like to refresh this summary?

#### Refresh the summary immediately

Use this radio button to refresh the selected summary immediately. Refresh will begin after clicking OK.

This option is useful when you have smaller summary tables, or when you need to refresh the Summary Folder right away, without relying on the scheduling capabilities of the database server. Discoverer Administrator displays a progress bar enabling you to monitor the refresh.

#### Schedule the refresh at a later time

Select this radio button to highlight the Date and Time fields where you can use the arrow buttons or type into the fields to select a later date and time when you want the refresh to occur.

This option submits a job to the queue using DBMS\_JOB and immediately returns you to Discoverer Administrator (rather than waiting for the refresh to be complete) enabling you to continue working. This option is useful when you have larger summary tables, which are best built during off-peak hours.

#### Perform Incremental refresh

Select this check box if you want to perform an incremental refresh, available against Oracle 8.1.7 databases (and later) only.

An incremental refresh is faster than a full refresh as it incrementally adds the new data that has been inserted into the tables.

During a summary refresh with Oracle 8.1.5 databases (or earlier) a full table scan is carried out.

Clear this check box to refresh the summary using a full table scan.

**Notes**

- The length of time taken for the refresh to complete depends on the data volume and the current database engine load.
- For further information on the conditions required for incremental refresh, please see *Oracle9i Data Warehousing Guide*.

## Refresh Summary Folder dialog

Use this dialog to set the refresh date and time for a summary folder.

This dialog is also displayed as:

Summary Wizard: Step 4

Summary Wizard: Step 5

Summary Wizard: Step 6

Edit Summary dialog: Refresh tab

For more information about refreshing summary folders see:

["How does ASM work?"](#)

["Why must you refresh summary data?"](#)

["What happens when a summary folder is refreshed?"](#)

## For summary folders (based on Discoverer summary tables or materialized views) refreshed by Discoverer

For summary folders refreshed by Discoverer, you can decide whether you want to refresh the summary automatically. If so, you can specify the date and time and the interval that you want to repeat the refresh.

### **When was this summary last refreshed?**

(Read only) This field displays the date and time of the last refresh.

### **Automatically refresh this summary folder, starting on:**

Use this check box to specify the date, time and repeat period that you want to apply to the refresh of this summary folder.

## **For summary folders (based on external summary tables) refreshed by another application**

For summary folders (based on external summary tables) that are refreshed by another application, you can decide whether you want Discoverer to refresh the summary folder automatically, and if so you specify a date and time and the interval that you want to repeat the refresh.

### **Manage the refresh of this summary**

Use this check box if you want Discoverer to manage the refresh of this summary folder.

**Note:** Be aware that if you use this option, you give Discoverer full control over the external summary. For example, if you delete the summary folder that is based on a managed external summary, you also delete the external summary.

### **When was this summary last refreshed?**

#### **Date/Time**

Use this field to enter the date and time the summary data was last refreshed. Discoverer uses this information to determine when summary data should be used.

#### **Automatically refresh this summary folder, starting on:**

Use this check box to specify the date, time and repeat period that you want to apply to the refresh of this summary folder.



## Refresh Wizard dialog

Use this wizard to refresh business areas in the current End User Layer.

### Refresh Wizard Step 1

Use this dialog to specify how you want a business area to be refreshed. For example, if you are using an Oracle database, you refresh from the online dictionary.

#### **On line dictionary**

Use this radio button to refresh the business area from the Oracle database tables on which the business area is based.

#### **Gateway**

Use this radio button refresh the business area from the source that you select from the drop down list.

#### **Finish**

Use this button to start the refresh process from the online dictionary.

#### **Notes**

- If you choose the Gateway check box, click Next to display the Refresh Wizard Step 2.

### Refresh Wizard Step 2

Use this dialog to select the gateway application that you want to refresh from.

#### **Select the application you want to refresh from**

Use this list to select the gateway application that you are using as the source for the current EUL.

#### **Finish**

Use this button to start the refresh process from the selected gateway application.

## Repository Users dialog

There may be a single database user that all Discoverer end users can exploit, or different ones created for each database user. The advantage of having a single database user is that individual end users do not need additional privileges to process scheduled workbooks, but the disadvantage is that space quota is shared, and so could be exhausted by a single user. Having multiple repository users provides a greater degree of control.

## Responsibilities dialog

Use the Responsibilities dialog to select an Oracle Applications Responsibility with which to connect to an Oracle Applications EUL.

For more information, see:

["Using Discoverer with Oracle Applications"](#)

### **Responsibility list**

Use this list to select the Responsibility that you want to connect to the database with.

### **OK**

Use this button to connect to the database as the selected Responsibility.

## Schedule Workbooks dialog: General tab

Use this dialog to:

- edit the description of a scheduled workbook
- specify the interval between when Discoverer processes the scheduled workbook and when you want Discoverer to delete results automatically

For more information, see:

["Scheduling workbooks"](#)

### **Name this scheduled workbook:**

This read only field displays the name of the scheduled workbook.

### **Description:**

(optional) Use this field to enter additional information about the scheduled workbook. Discoverer end users will see this information when deciding which workbook to open.

### **Scheduled workbooks save results each time they run:**

#### **Yes, keep all results**

Use this radio button when you do not want to delete results sets when new results sets are created. For example, for a monthly report, do not delete the January and February results set when the March results set is created.

#### **No, just keep the latest set of results**

Use this radio button when you do want to delete old results sets when new results sets are created. For example, for a monthly report, delete the January results set when the February results set is created.

### **Delete results automatically after days:**

Use this spin box to specify the interval in days between running this workbook and automatically deleting the workbook results. For example, you might want to delete the results set of a weekly report every seven days.

## Schedule Workbook dialog: Schedule tab

Use this dialog to specify when you want Discoverer to process the scheduled workbook. For example, you might want Discoverer to process a workbook at 1:00 a.m. every Sunday morning.

For more information, see:

["Scheduling workbooks"](#)

### **Sheets included in the scheduled workbook:**

Lists all the sheets included in the currently selected scheduled workbook.

### **Schedule this workbook on:**

Use these fields to specify when you want Discoverer to process the scheduled workbook.

#### **Time:**

Use this spin box to specify the time at which you want Discoverer to process the scheduled workbook. The current time is displayed by default.

#### **Date:**

Use this spin box to specify the date on which you want Discoverer to process the scheduled workbook. The current date is displayed by default.

### **How often do you want to repeat this schedule?**

Use these fields to specify how often you want Discoverer to process this scheduled workbook.

#### **Never**

Use this radio button when you want Discoverer to process a scheduled workbook only once. For example, for an occasional report requested by your manager.

#### **Repeat every:**

Use this radio button when you want Discoverer to process a scheduled workbook at regular intervals. For example, once per day or once per month.

## Security dialog: Business Area - > User tab

Use this tab to grant or revoke multiple user access to a single business area. For example, to give a group of Discoverer end users access to the Video Store Tutorial business area so that they can use the Discoverer Plus tutorial.

To grant a single user access to multiple business areas at once, use the "[Security dialog: Users - > Business Area tab](#)".

For more information, see:

["Controlling access to information"](#)

### **Business Area**

Use this drop down to select the business area to which you want to grant access. The list contains business areas that you currently have open. If you cannot see the business area to which you want to grant access, reconnect to Discoverer and open that business area.

### **Available users/roles**

Use this list to specify which users and roles you want to grant access to the selected business area. To give access, move user names and roles from the Available users/roles list to the Selected users/roles list.

### **Selected users/roles**

Use this list to see which users have access to the selected business area. To revoke access, move user names and roles from the Selected users/roles list back to the Available users/roles list.

### **Show**

### **Users**

Use this check box to display Discoverer users in the Available users/roles list.

### **Roles**

Use this check box to display Discoverer roles in the Available users/roles list.

**Allow Administration**

Use this check box to grants both access and administration rights to the users listed in the box at the right. The operations the user can perform on the granted business area depend on the user's Administration privileges.

**Notes**

- Before displaying the folders in a business area, Discoverer checks if the user has database access to the tables referenced in the folders. If they don't have the necessary permission, Discoverer does not display the folders. You can override this check by changing the value of the ObjectsAlwaysAccessible registry setting (for more information, see ObjectsAlwaysAccessible in [Chapter 22, "Discoverer registry settings"](#)).
- When logged in as an Oracle Applications user, the term Role is replaced with Responsibility.
- You can select more than one user or role by pressing the Ctrl key and clicking another user or role.

## Security dialog: Users - > Business Area tab

Use this tab to grant or revoke user access to multiple business areas. For example, to grant a new Discoverer end user access to a number of business areas in the End User Layer.

To grant multiple users access to a single business area, use the "[Security dialog: Business Area - > User tab](#)".

For more information, see:

["Controlling access to information"](#)

### **User/Role**

Use this drop down to select the user or role that requires access.

### **Show**

### **Users**

Use this check box to display Discoverer users in the User/Role list.

### **Roles**

Use this check box to display Discoverer roles in the User/Role list.

### **Available business areas**

Use this list to specify which business areas you want to grant access to the selected user or role. To grant access, move business areas from the Available business areas list to the Selected business areas list.

### **Selected business areas**

Use this list to see which business areas the selected user or role has. To revoke access, move business areas from the Selected business areas list back to the Available business areas list.

### **Allow Administration**

Use this check box to grants both access and administration rights on the selected business areas to the user selected.



**Notes**

- Before displaying the folders in a business area, Discoverer checks if the user has database access to the tables referenced in the folders. If they don't have the necessary permission, Discoverer does not display the folders. You can override this check by changing the value of the ObjectsAlwaysAccessible registry setting (for more information, see ObjectsAlwaysAccessible in [Chapter 22, "Discoverer registry settings"](#)).
- When logged in as an Oracle Applications user, the term Role is replaced with Responsibility.
- You can select more than one business area by pressing the Ctrl key and clicking another business area.

## Select Default EUL dialog

Use this dialog to select which EUL you have access to by default when you connect to Discoverer Administrator.

For more information, see:

["Creating and maintaining End User Layers"](#)

### Select a default EUL

Use this list to select a default End User Layer. Discoverer will automatically connect to this EUL whenever you (the current userid) connect to Discoverer.

## Select items to include in this hierarchy dialog

Use this dialog to create or edit items to include in hierarchies for use in Discoverer workbooks.

This dialog is also displayed as:

Hierarchy Wizard: Step 2

Edit Hierarchy dialog: Items tab

For more information, see:

["What are hierarchies?"](#)

["What are item hierarchies?"](#)

### Select items to include in this hierarchy.

Use this drop down list to select a business area that contains the items that you want to use in the hierarchy.

Then, use the expandable list below to select one or more items. To add items to the hierarchy, move items from the left-hand list to the right-hand list.

### Description

This field displays a brief description of the item format currently selected in the right hand list.

### Promote

Use this button to move the selected item up one level in the hierarchy.

### Demote

Use this button to move the selected item down one level in the hierarchy.

### Group

Use this button to position selected items on the same level of the hierarchy. Use grouped items so the user can drill from one item to display two levels of detail, e.g. the user could drill from Product to both description and full description.

### **Ungroup**

Use this button to ungroup the selected items, which means that they are no longer on the same level of the hierarchy.

### **Notes**

You can select more than one item by pressing the Ctrl key and clicking another item.

## Workarea: Summaries tab

Use this tab to manage summary folders in the EUL (ordered by business area).  
From here you can:

- create new summary folders
- edit summary folders
- refresh summary folders
- delete summary folders
- examine summary folders properties

For more information, see:

["What is the Workarea?"](#)

["About folders and summary folders in Discoverer"](#)

### Summaries tab

Use the list to select a summary folder.

To see a list of menu options available for a summary folder, right click the cube icon that represents the summary folder.

**Table 25–5** *How Discoverer represents summary folders*

Summary folder	How the summary folder is represented in Discoverer
valid summary folder.	a cube icon with a clock face
valid external summary folder	a cube icon
broken summary folder	a cube icon with a yellow warning triangle

### Notes

- If you get the message 'This user requires Create Any Materialized View privilege' when you try to refresh a summary, you do not have the necessary privileges to refresh summaries. To grant the necessary privileges, follow these steps:
  - Log out of Discoverer Administrator
  - Run Oracle SQL\*Plus, logged in as your database administrator user name and password.

- Run the following SQL script:  
`<ORACLE HOME>\ Discv902\Sql\eulasm.sql`
- Restart Discoverer Administrator
- A summary folder is considered broken when Discoverer cannot use the summary table, materialized view or detail tables. To find out more about why a summary folder is broken, use the View | Validate Folders option. You might want to edit a broken summary folder to investigate its composition and remove any broken folders.

## Summary Properties dialog

Use this dialog to look at and configure summary folders. For example, to look at a summary's status, or change the next refresh date for a summary.

For more information, see:

["Managing summary folders"](#)

["What are summary folders?"](#)

["What are Discoverer summary tables?"](#)

["What are materialized views?"](#)

["Why must you refresh summary data?"](#)

### Name

Use this field to enter a new summary folder name.

### Description

Use this field to enter a new description of the summary folder, where you can store additional information.

### Type

(Read only) This field displays the type of summary.

- Managed summary folder

Managed summary folders have their data refreshed at intervals you specify. Managed summary folders can contain many combinations. Discoverer can create the tables required, and lets you specify all aspects of the table and column names and storage properties for tables being created. Alternatively you can pre-create the tables, and simply tell Discoverer the table owner and name.

- External summary folder

External summary folders contain tables created with an application external to Discoverer. The column and item names may differ from those in Discoverer. With this option, you register each external table and map its columns to items in the end user layer. You can specify that Discoverer take over management of the summary folder, so that it can populate the table and continue to refresh its data.

### **Available for queries**

Use this field to specify whether the summary can be used for queries run in Discoverer Plus. For example, when a Discoverer end user opens a worksheet that displays one or more items in the summary.

### **Status**

(Read only) This field describes the current point in the life cycle of this summary. Only summaries that are completed can be available for queries (for more information, see "Notes" below).

### **Last refreshed**

(Read only) This field displays the date when this summary table last received up-to-date data from the database. This is only available for managed summary folders.

### **Next Refresh**

Use this field to change the date when this summary table will next receive up-to-date data from the database. This is only available for managed summary folders.

### **Refresh Interval**

Use this field to change how often this summary receives up-to-date data from the database. This is only available for managed summary folders.

### **Identifier**

Use this field to change the unique name that Discoverer uses to identify EUL and workbook objects. When matching objects common to different EULs, Discoverer uses Identifiers to locate objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

### **Automatically save changes after each edit**

Select this check box to save changes each time a properties field is updated.

### **Notes**

- The following list explains the meaning of values displayed in the Status field:
  - Pending



---

The summary refresh is scheduled on DBMS\_Job queue, but has not yet started execution.

- Under construction

The summary refresh job has started, and is inserting the rows into the summary table.

- Unusable

After initial summary creation and prior to first refresh (Oracle 8.1.7 databases or later).

- Stale

The summary data is inconsistent with the detail data for a materialized view (Oracle 8.1.7 databases or later).

- Complete

The summary folder is complete and ready for use.

- Failed

The summary refresh job failed, and the database error is displayed.

- Refresh Required

The end user must refresh the summary folder before it can be used. This normally happens only when the Discoverer manager has changed the folder, item or join definitions in a way that requires the summary to be recalculated. The following reasons can be displayed for a summary where refresh is required:

**Incompatible with database version** - The EUL definition of the materialized view is incompatible with the version of the database. This can occur if a database export/import of the EUL has occurred across database versions. For example, from Oracle 8.1.5 to an Oracle 8.1.7 database.

**EUL has changed** - Dependent EUL item has changed definition. For example, the formula of an item used in the summary.

**Server has changed** - The definition of the materialized view in the database is inconsistent with the definition in the EUL (Oracle 8.1.7 databases or later).

- External

Applies to all external summaries.

## Summary Wizard (ASM): List of dialogs

The Summary Wizard enables you to use the Automated Summary Management facility to create and maintain the best set of summaries for your organization's needs with the minimum of manual intervention.

For more information about ASM Summary Wizard dialogs, see:

["Summary Wizard: Step 1 dialog"](#)

["Summary Wizard \(ASM\): Step 2 Analyze Folders dialog"](#)

["Summary Wizard \(ASM\): Change default settings: List of dialog tabs"](#)

["Summary Wizard \(ASM\): Step 3 Allocate Space dialog"](#)

["Summary Wizard \(ASM\): Not Analyzed dialog"](#)

["Summary Wizard \(ASM\): Recommended Summaries dialog"](#)

## Summary Wizard (ASM): Change default settings: List of dialog tabs

The preset default values found within Advanced Settings enable ASM to create and maintain the best set of summaries for your needs. If you want you can further refine the default setting to alter how ASM creates and maintains your summaries.

The Advanced Settings define which objects in the database to consider for inclusion in the ASM process and influence what ASM produces.

The Advanced Settings (Change Default Settings dialog) displays the following tabs:

"Summary Wizard (ASM): Change default settings dialog: Analyze tab"

"Summary Wizard (ASM): Change default settings dialog: Folders tab"

"Summary Wizard (ASM): Change default settings dialog: Query User tab"

"Summary Wizard (ASM): Change default settings dialog: Query Usage tab"

"Summary Wizard (ASM): Change default settings dialog: Deletion tab"

## Summary Wizard (ASM): Change default settings dialog: Folders tab

Use this tab to specify which folders are analyzed by ASM. By default all folders are included. For example, you might have a large data warehouse and wish to only analyze the most important folders (for instance the fact tables) to reduce analysis time.

For more information, see:

["Managing summary folders"](#)

### **Available**

This list displays folders that are not included in the ASM analysis. Select folders for analysis by moving folders from the Available list to the Included list.

### **Included**

This list displays folders that are included in the ASM analysis. Remove folders from the ASM analysis by moving folders from the Included list to the Available list.

### **Notes**

You can select more than one folder by pressing the Ctrl key and clicking another folder.

## Summary Wizard (ASM): Change default settings dialog: Analyze tab

Use this tab to specify which folders to analyze and specify an optimization level. For example, to perform a complete analysis on all folders, not just those that have not already been analyzed.

For more information, see:

["Managing summary folders"](#)

### How do you wish to analyze the selected folders?

#### **Only analyze folders that have not already been analyzed**

Use this radio button when you have partly analyzed some folders previously, and wish to analyze the rest. When summary data has been held for more than the period specified by the After \_ days field, this data is also re-analyzed (see After \_ days).

#### **Analyze ALL folders regardless**

Use this radio button when you want to analyze every folder in the EUL.

### When would you like a folders analysis to expire?

#### **After \_ days**

Use this field to specify how long to use analyzed summary data. After this period, folders will be re-analyzed when you run ASM. The default for this is 30 days.

### How would you like the analysis to be optimized?

Use this slider bar to increase the speed of analyze or the range of folders analyzed.

#### **Max Speed**

At this level, around 10% of folders are analyzed. This level produces a basic set of summaries without taking too long. For example, if you have a large data warehouse and wish to minimize analysis time.

**Normal**

At this level, you get an equal balance between speed and range.

**Max Accuracy**

At this level, 100% of folders are analyzed (default setting). This setting enables the widest range of summaries to be created by ASM. For example, if you have a relatively small data warehouse or where analysis time is not an issue.

## Summary Wizard (ASM): Change default settings dialog: Deletion tab

Use this tab to configure how you purge (or delete) summary data that is out-of-date. For example, to make more space available in the database.

For more information, see:

["Managing summary folders"](#)

### Delete specific summary folders if

#### Last queried more than \_ days ago

Use this field to delete summary folders if they were last used by Discoverer end users more than the number of specified days. For example, delete summary folders not used for seven days.

#### Created more than \_ days ago

Use this field to delete summary folders if they were created before a specified time. For example, delete summary folders created more than two weeks ago.

#### Average usage less than \_ times per \_ over the last \_ \_

Use these fields when you want to finely control which summary folders are purged. For example, delete summary folders used less than ten times per week over the last two weeks.

### Always retain the following summaries

Use this check box to exclude particular summary folders from the purge. For example, to maintain important summary folders that you always need to use.

### Available

This list displays all folders that are not excluded from the purge. Select folders for exclusion from the purge by moving folders from the Available list to the Selected list.

### Selected

This list displays folders that are excluded from the purge. Remove folders from the exclusion by moving folders from the Selected list to the Available list.

### **Notes**

- You cannot move external summary folders from the Selected column.
- If you try to move an external summary folder from the Selected to the Available column a warning message appears and the summary folder remains in the Selected column. Discoverer does not delete external summary data as it does not own it. Also deleting the metadata associated with external summary tables would not yield any great space gain which is why it is not done.



## Summary Wizard (ASM): Change default settings dialog: Query Usage tab

Use this tab to select which queries are considered for summary recommendation. For example, to include only queries run a specific time when Discoverer Plus users are working.

For more information, see:

["Managing summary folders"](#)

### **Include**

Use this drop down list to define which queries are considered for ASM.

### **All queries**

Use this option to consider recommendations for summaries based upon all queries previously run.

### **Queries run since last execution**

Use this option to consider recommendations for summaries based upon those queries run since the last execution of ASM.

### **Specific queries**

Use this option to consider queries run at particular times, specified below.

- Which have been run in the last x days
- Which have been executed more than x times per minute/day/week/month/year
- Where elapsed time is greater than x seconds

### **Move the slider to the position which best reflects the nature of your users queries**

Use this slider bar to determine whether during analysis the constructed summary data favors predetermined (performance) or ad hoc (coverage) queries.

### **Predetermined**

Use this setting to optimize the summaries maintained by ASM to reflect historical queries. In other words, the summaries will give great performance improvements where queries stay much the same over time.

For example, ASM might recommend a list of five exact match summaries, corresponding one-to-one with previously run queries (where ASM determines there is a benefit).

### **Mixed**

A balance between predetermined and ad hoc queries (the default).

### **Adhoc**

Use this setting to increase the coverage of a summary giving a potential performance gain for queries that have never been run before, but are closely related to previous system usage. However, the cost of this is that the individual performance gain for the previously run queries may not be as high.

For example, ASM might combine the five exact-match summaries to form fewer but more general summaries. These would provide benefit not only for the five previously run queries but also for a greater number of other potential queries (i.e. there would be a gain in overall coverage).

## Summary Wizard (ASM): Change default settings dialog: Query User tab

Use this dialog to use Query Performance Statistics (QPP) from selected users in the ASM process. For example, to base ASM on a sub-set of users that require maximum performance when using Discoverer Plus.

For more information, see:

["Managing summary folders"](#)

### **Available**

This list displays users that are not included in the ASM process. Select users for analysis by moving users from the **Available** list to the **Included** list.

### **Included**

This list displays users that are included in the ASM process. Remove users from the ASM process by moving users from the **Included** list to the **Available** list.

### **Notes**

You can select more than one user by pressing the Ctrl key and clicking another user.

## Summary Wizard (ASM): Not Analyzed dialog

Use this dialog to specify how you deal with folders that cannot be analyzed. For example, when you do not have analyze privileges on a particular database.

This dialog is also displayed as:

Not Analyzed dialog

For more information, see:

["Managing summary folders"](#)

**\_ out of \_ folders could not be analyzed. Would you like those folders to be excluded from the automatic summary creation?**

### Yes

Use this button to exclude folders that could not be analyzed.

### No

Use this button to include folders that could not be analyzed.

### Help

Use this button to get more information about the folders that could not be analyzed.

### Notes

- You do not have ANALYZE privileges for a given object/table
  - In order to ANALYZE a table, you need one of the following:
    - to be the owner of that table
    - to have general ANALYZE privileges for the database (e.g. via 'grant ANALYZE any to me')

Where one of the underlying tables that make up a folder does not fit the above rules, that folder will not be analyzed. This means that if one or more tables within a folder cannot be analyzed then the whole folder is treated as if it cannot be analyzed.

- When a folder is Invalid

How you fix this depends on why a folder is marked as invalid.

To display the error message associated with an invalid folder go to View | Validate Folders.

- You are trying to ANALYZE over a DB-Link

If a folder refers to a table that resides on a database accessed over a DB-Link then ANALYZE will fail. This operation is not supported in the Oracle Server.

- When Discoverer cannot determine or access the full list of tables that constitute a folder.

A Discoverer folder can contain more than one underlying database table and/or view. Getting a full set of the underlying tables may be impossible. For example:

- Where a view is based upon another view and the ASM user has access to the top level view, but not to the referenced view underneath.

This makes it impossible for the ASM user to see which database tables are actually used to make that view.

- Where folders do not fully resolve to tables

This should only really apply to the server dynamic tables (e.g. the V\$ tables, and many DBA\_tables). Not all these views and tables resolve to physical tables; some of them are stored in memory, thus they cannot be analyzed.

For example:

- V\$\_LOCKS

Although you may run queries on this kind of table/view, in practice it makes sense not to have summaries built on them as the summarized data would soon be out of date.

## Summary Wizard (ASM): Recommended Summaries dialog

Use this dialog to look at which summaries Discoverer intends to use and change the included list if required. Discoverer may mark existing summaries for deletion when they fall outside the current ASM policy.

This dialog is also displayed as:

Recommended Summaries dialog

For more information, see:

["Managing summary folders"](#)

### **Include**

Use this check box to include a recommended folder in the ASM summary creation/deletion process.

### **Action**

This field specifies the action that will be carried out as part of the ASM process if the Include check box is selected.

### **Name**

This field displays the Discoverer folder name.

### **Size**

This field displays the amount of space required to contain the recommended summary folder.

### **Total space required**

This field displays the total amount of space that is needed for all recommended summaries.

### **Notes**

- When you first display the Recommended Summaries dialog, the summary folders that Discoverer recommends for the allocated space are selected. This means that should you click the Finish button in the main wizard the summary folders that are selected will be either be created or deleted depending on whether Create or Delete is displayed in the **Action** column. You can change which summary folders are created/deleted by selecting or clearing check boxes from the list of recommended summaries.

- The right hand pane lists the currently selected summary folder components.
- The total space required for the selected summaries is displayed underneath.
- The method used to derive the figure for the **Total space required** from the list of recommended summaries is as follows:

The amount of space required is totalled and displayed in the **Total space required** field. Where summary folders are to be deleted, the space that was used by the summary folders to be deleted is made available for use by one of the other summary folders listed. The effect is that the figure for the **Total space required** is reduced by the sum of the KB of any summary folders to be deleted.

## Summary Wizard (ASM): Step 2 Analyze Folders dialog

Use this dialog to automatically analyze your database structure and recommend which summaries you need.

This dialog is also displayed as:

Summary Wizard: Step 2 dialog

For more information, see:

["Managing summary folders"](#)

### **(Progress indicator)**

Use this bar to monitor the progress of the database analysis. When analysis is in progress, the cube above the bar revolves.

### **Start**

Use this button to begin the folder analysis.

The first time this process is run, the analysis is based on default values. Any changes made to these values (through Advanced Settings) will be applied during subsequent folder analysis.

### **Continue**

Use this button to resume folder analysis after you have stopped the process using the Stop button.

### **Stop**

Use this button to pause the folder analysis.

- To resume the folder analysis, use the Continue button.
- To stop folder analysis, use the Cancel button.

### **Total folders in policy**

This field displays number of folders included in the ASM policy.

### **Folders analyzed**

This field displays number of folders in the ASM policy that have been analyzed.



### **Advanced Settings**

Use this button to display the "[Summary Wizard \(ASM\): Change default settings dialog: Analyze tab](#)", where can edit a range of default settings upon which folder analysis is based (known as the ASM Policy).

### **Notes**

If you pause folder analysis, then change the ASM Policy, when you resume the process the new ASM Policy is used.

## Summary Wizard (ASM): Step 3 Allocate Space dialog

Use this dialog to specify the ASM performance required against the amount of tablespace available for ASM. For example, to maximize ASM performance using the minimum of tablespace. You can also analyze the performance gain achieved by increasing the amount of tablespace.

For more information, see:

["Managing summary folders"](#)

### Performance vs. Space (KB)

Use this graph to evaluate the performance gain achieved by using the specified amount of allocated tablespace. As you change the amount of tablespace, you can see the performance impact displayed as a factor value.

- The dotted line indicates the amount of tablespace available.
- The red line indicates the amount of tablespace selected.
- The plot line shows the performance gain achieved by selecting various amounts of tablespace.
- To change the selected space setting, either:
  - click the graph area and drag the red line to the left or right
  - drag the triangle above the Space (KB) axis to the left or right
  - click the graph area to the left of right of the red line
  - enter the amount of tablespace you wish to use (in KB) in the Create summaries to fill field

### Tablespace to use for summaries

Use this drop down list to specify which tablespace you want to use to store the summary tables.

### Create summaries to fill

Use this field when you know how much tablespace is available and you want to evaluate the performance for the value.

### Estimated performance gain

This figure is a factor value that represents the number of times faster that queries will run if ASM creates the recommended summaries.

**Recommended Summaries**

Use this button to display the ["Summary Wizard \(ASM\): Recommended Summaries dialog"](#), where you specify which summaries will be created/removed for optimum performance gain given the space currently allocated.

**Advanced Settings**

Use this button to display the ["Summary Wizard \(ASM\): Change default settings: List of dialog tabs"](#), where you define the ASM policy.

**Notes**

When choosing a tablespace, it is recommended that you place summaries in a separate tablespace specifically intended for summary data. If such a tablespace does not exist, we strongly recommend you do not use the SYSTEM or TEMP tablespaces.

## Summary Wizard: Step 1 dialog

Use this dialog to specify how you want to create Discoverer summary folders. For example, to have Discoverer automatically create summaries for you.

For more information, see:

["Managing summary folders"](#)

["Creating summary folders manually"](#)

### **Have Discoverer recommend and create the best summaries for you**

Use this radio button when you want Discoverer to automatically create summaries for you. Here, you display the "[Summary Wizard \(ASM\): Step 2 Analyze Folders dialog](#)", which enables you to automatically analyze your tables and recommend which summaries to create.

### **I want to create the summaries myself**

Use this radio button when you want to create summaries manually. Here, you display the "[Summary Wizard: Step 2 dialog](#)".

## Summary Wizard: Step 2 dialog

Use this dialog to choose how to create summary folders. For example, to use query statistics collected on Discoverer Plus users to determine which summaries to create.

For more information, see:

["Creating summary folders manually"](#)

["Managing summary folders"](#)

### From items in the End User Layer

Use this radio button to create summary folders from an existing set of tables in the End User Layer.

### Based on query performance statistics

Use this radio button to create summary folders based on Discoverer queries that were run previously. This powerful facility means that you do not have to choose the items yourself. Once you have created the summary folder based on previous queries, you can add items and combinations, tailoring it to your users' needs.

### Based on an external summary table

Use this radio button to use external summary folders containing tables created with an application external to Discoverer. The column and item names may differ from those in Discoverer. With this option, you will register each external table and map its columns to items in the End User Layer. You can specify that Discoverer take over management of the summary folder, so that it can populate the table and continue to refresh its data.

- **From items in the End User Layer** (for more information, see, ["How to create summary folders based on items in the EUL"](#))

Use this option to manually select combinations of EUL items that you want to include in a summary folder.

You might select this option if, for example:

- you have switched off the Collect Query Statistics privilege (for more information, see ["How to specify the tasks a user or role \(responsibility\) can perform"](#))
- you want to manually select the combinations of EUL items that make up a summary folder

- **Using query performance statistics** (for more information, see "[How to create summary folders based on users' queries](#)")

Use this option to choose from a selection of summary folder suggestions (based on queries that have been run) gathered by running query performance statistics. Query performance statistics are automatically generated when queries are run in Discoverer Plus if the Collect Query Statistics privilege is switched on for users (for more information, see "[How to specify the tasks a user or role \(responsibility\) can perform](#)").

You might select this option if you know that you want to create one or more summary folders based upon specific queries, but you do not necessarily want Discoverer to create any other summary folders.

- **Registering an external summary table** (for more information, see "[How to create summary folders based on external summary tables](#)")

Use this option when you want your summary folders to be based upon an external summary table. You might use this option if you have your own summary tables that you want

## Use Query Statistics dialog

Use this dialog to specify how you collect query statistics for estimating best summaries. For example, to use query statistics where queries exceed a specified amount of CPU time.

This dialog is also known as:

Summary Wizard: Step 3

For more information, see:

["Creating summary folders manually"](#)

["Managing summary folders"](#)

### **Specify search criteria to obtain statistics on query performance, then click "Search"**

Use these settings to Select a query to be summarized from the list below.

#### **Show query statistics from within the last \_**

Use this field to define how recent the query statistic must be to qualify for the query list.

#### **Average CPU Time exceeds \_**

Use this field to specify the minimum time required to execute the query on the database server.

#### **Average elapsed time exceeds \_**

Use this field to specify the minimum time required to execute the query on the client workstation.

#### **Number of queries exceeds \_**

Use this field to specify the minimum number of runs executed for the selected query. The runs may have been executed by different users at different times, but all used the same combination of folders and items.

#### **Search**

Use this button to search for query statistics matching the search criteria specified above and display them in the **Select a query to be summarized** list.

### **Select a query to be summarized**

This list displays query statistics matching the search criteria specified.

Select a query from the list to display the query's folders, joins and items in the lower right panel of the dialog, and activate the Next button.

The #Hits column records the number of times a query has been run by end users.

### **Notes**

- Summaries built using Query statistics are refreshed by Discoverer. These are referred to as managed summary folders.
- A check mark or cube icon indicates that the current query has found a matching summary folder from a previous query. The symbol indicates an exact match that includes all objects.



## Using External Tables dialog

Use this dialog to map an external database table to the End User Layer (EUL). Run the Summary Wizard once for each external table you want to register.

External summary folders reference tables created with an application external to Discoverer. The column and item names may differ from those generated by Discoverer.

This dialog is also displayed as:

Summary Wizard: Step 3 dialog

For more information, see ["Creating summary folders manually"](#)

### Select an external summary table

Use the Select button to display the ["Choose user or table/view dialog"](#), where you select a table within the current database.

### Available Items

Use the drop down menu to select the business area that you want to map to the external summary table.

Use the list box to map EUL items (for the current business area) to corresponding database columns in the external summary table (displayed in the Mapped Items list box).

Map items in one of the following ways:

- Drag and drop
  - Drag an item from the Available items list into the corresponding database column in the Mapped items list.
  - Drag a folder from the Available items list box into the Mapped Items list box to map all the columns in the external summary table to End User Layer items in a single operation. Discoverer automatically matches the items of similarly named database columns in the external summary table. Repeat this procedure for multiple folders if the external summary table maps to items in more than one folder in the EUL.
- Include button

Select a database column in the Mapped items list and a corresponding item in the Available items list and click the include button (right arrow) and Discoverer matches both in the Mapped items list

- Double click

Select an database column in the Mapped items list and then double click the corresponding item in the Available items list

### **Mapped Items:**

The database columns in the external summary table mapped to corresponding items in the EUL

- Item

The item in the EUL mapped to a corresponding database column in the external summary table

- Database Column

The database column in the external summary table mapped to a corresponding item in the EUL

- Datatype

Data type and size of the database column

## Using Help

Oracle9i Discoverer Administrator provides comprehensive online context sensitive Help and reference information.

For more information, see "[About Discoverer Administrator documentation and online help](#)".

## Values dialog

Use this dialog to select one or more values to use when you create or edit a condition.

For more information, see:

["What are conditions?"](#)

Discoverer displays this dialog when you choose the Select Multiple Values option from the drop down list in the Values field of the New/Edit Condition dialog.

### **Select values:**

Select one or more check boxes next to corresponding values to include the selected values in the Value(s) field in the Conditions dialog.

Use the Select All button to select all the values displayed in the **Select Values** field.

Use the Select None button to clear all the values displayed in the **Select Values** field

The value(s) you select here are used in the current condition statement of this condition.

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# Glossary

## A

### **access rights and privileges**

Specific functionality such as update and delete privileges which are granted to a specific user ID by a database administrator, or by the user ID which "owns" the tables for which the authority is being granted.

### **aggregate**

Summarized data. For example, unit sales of a particular product could be aggregated by day, month, quarter and yearly sales.

### **alignment**

The way in which data is positioned in a field. It may be positioned to the left, right, center, flush/left, flush/right, or flush/center of the defined width of a field.

### **analytic functions**

Compute an aggregate value based on a group of rows. They differ from aggregate functions in that they return multiple rows for each group. For more information about Oracle9i functions, see *Oracle9i SQL Reference* or *Oracle9i Data Warehousing Guide*.

### **automated summary management (ASM)**

A Discoverer feature to simplify the process of summary creation and maintenance. ASM enables you to set a range of input parameters known as a summary policy for Discoverer to operate within. Discoverer will automatically create and maintain the best set of summaries according to the summary policy.

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**axis**

One of the three directions of a sheet. Items that you choose for a query appear in the axes. See: *top axis, side axis, page axis, axis item*.

**axis item**

An item appearing in either the top axis, side axis, or page axis of a sheet. In a table, items can appear only in the top axis or page axis; in a crosstab, items can appear in any axis. See: *axis, data item*.

**B****business area**

A conceptual grouping of tables and/or views that apply to user's specific data requirements. For example, an accounting department may have an accounting Business Area that represents data about budgets and finance, while project leaders in an engineering department would have a business area specifically for projects requiring budget information.

Although some of the items may be the same, the exact combination of tables and views for each department may be different. A Business Area is represented as a file cabinet in Discoverer. This can be opened to display folders, and all the items in those folders.

**C****cache (memory)**

A temporary storage place for database data that is currently being accessed or changed by users, or for data that Oracle Server requires to support users. The terms are often used interchangeably.

**calculation**

A mathematical formula performed on one or more items. Oracle Discoverer enables you to build complex calculations

**clipboard**

A memory buffer. An object remains on the Clipboard until you cut or copy another object, or until you quit the application.

---

**collapse**

To remove all levels of related items from below a selected item. In effect, to undo a drill-down. See: *drill down*.

**color palette**

Contains all the colors available to the windowing system, the drawing surface, or a window and its views.

**column**

A vertical space in a database table that represents a particular domain of data. A column has a column name (e.g., ENAME) and a specific data type (e.g., CHAR). For example, in a table of employee information, all of the employees' names would constitute one column. A record group column represents a database column.

In Discoverer, the particular type of data is displayed vertically in your worksheet.

**command line**

An operating-system command line. Most Oracle products can be invoked from a command line using a number of executable arguments.

**complex folder**

A folder created in Discoverer Administrator that contains items from more than one folder (or database table).

**conceptually identical object**

Conceptually Identical Objects are objects in different EULs that refer to the same business objects, (e.g, folders, item-classes, hierarchies). When identifying Conceptually Identical Objects, Discoverer uses either Display Names or Identifiers to match objects.

**condition**

A filter created on an item to restrict which values return. It contains a column and some qualifying data used to specify the volume of data. Conditions created in Discoverer Administrator can be optional or mandatory as business conditions dictate.

Conditions can also be created while defining a query in Discoverer Plus. For example, if you request all cities in the East Region you are using a condition (show East Region only) to limit the cities you get in your result set.

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**connect**

To log on to a database. You must connect if you want to create or modify queries or access an application stored in a database.

**connect string**

The set of parameters, including a protocol, that SQL\*Net uses to connect to a specific Oracle instance on the network.

**copy**

To store a replica of a selected object on the Clipboard, so that it may be pasted elsewhere in an editor if desired.

**crosstab**

A sheet layout that arranges items in a matrix of rows and columns. Items appear in both the top and side axes. Use a crosstab to display summary information and show how one item relates to another, such as sales by region by month. A crosstab is sometimes called a matrix. See: *table*.

**cursor**

A small icon representing the position of the mouse. The shape of the cursor varies, depending on the selected tool.

**cut**

To delete one or more objects and store them in the Clipboard, so that they may be pasted elsewhere in an editor, if desired.

**D****data item**

The item expressing the relationship between a top axis item and a side axis item. Only items which have a data item in common can appear opposite each other in the top and side axes. Applies only to crosstab-layout sheets. A data item is sometimes called a measure. See: *axis item*, *data point*.



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**data model**

A relational model that defines what data should be fetched from the database, what values should be computed, and how data should be ordered in a report. Report Builder objects that define the data model are queries, groups, columns, parameters, and links.

**data point**

The value of a data item, as displayed in a cell of a sheet. A data point reflects the relationship between intersecting axis items in a crosstab. See: *data item*.

**data type**

A standard form of data. Some common Oracle data types are CHAR, VARCHAR2, DATE, NUMBER, LONG, RAW, and LONG RAW.

**database**

A set of dictionary tables and user tables that are treated as a unit.

**DATE**

An Oracle Server data type. A date column may contain a date and time between January 1, 4712 BC and December 31, 4712 AD.

**date hierarchy**

Date hierarchies possess an inherent structure based on year, quarter, month, week, day, hour, minute, and second. The Discoverer manager uses date hierarchy templates to define many common formats for date hierarchies. You can create customized date hierarchies or use the default date hierarchy.

**date hierarchy template**

A predefined hierarchy of date levels including display format. Date hierarchy templates are applied to a date item to create a date hierarchy specific for that date item.

For example, apply a generic date hierarchy template of Year (YYYY), Month (Mon-YY), Day (DD-Mon\_YY) to 'sales\_date' to allow users to drill down from Year to month level and to Day level (from 1996 to June, 1996 to 2-June-96).

Use the date hierarchy template to define which time/date levels and which display format to use.

**default**

A value supplied by the system when a user does not specify a required command parameter or attribute.

---

**detail to master join**

A detail-to-master join icon represents a many-to-one relationship between two items in different folders. The foreign key is on left (Detail), the primary key is on right (Master). See: *master to detail join, join*.

**dialog box**

A partial screen or window that prompts you to enter information necessary to complete an operation.

**disabled**

An interface element state that means a menu item, button, etc., cannot be used in the current context; i.e., it does not respond to keyboard or mouse input.

**drag**

Press and hold down a mouse button while you slide the mouse pointer to a particular location in a window.

**drill**

To expand an item to include items related to it. Oracle Discoverer may query the database. See: *drill down, drill up*.

**drill down**

To expand an item to include related items lower than it in the hierarchy. Oracle Discoverer may query the database. See: *drill, drill up, collapse*.

**drill up**

To expand an item to include the next related item above it in the hierarchy. Oracle Discoverer may query the database. See: *drill, drill down, collapse*.

**duplicate**

An option that allows you to copy objects directly on the layout without affecting the contents of the Clipboard.

**E****enabled**

An interface element state that means that a menu item, button, etc., can be used in the current context, that is, it responds to keyboard or cursor/mouse input.

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## **End User Layer (EUL)**

A number of database tables and views that reside (conceptually) between the database dictionary/table definitions and client applications, such as Discoverer Plus. The End User Layer is a “meta-layer” that shields end users from the complexity of the database by providing meaningful, business-like terminology for database objects.

The EUL controls several elements such as hierarchy templates, formatting information, summary table management and aggregate information. The EUL also controls the SQL generated to extract the information from the database.

## **environment**

The user's computer-based workplace, including the tools typically used and their configurations. For Project Builder, this refers to the subset of tools that are used to complete various tasks related to developing Developer/2000 applications.

## **equijoin**

A join of two columns with the equal operator, dictating that only those rows that have identical data in the defined columns on opposite sides of the operator will be joined.

## **exception**

Data in your result set which falls outside of a set of criteria set by you.

## **execute**

See *run*.

## **export**

To store a copy of an object, module, selected text or image to a file or database. In Project Builder, the process of writing out a file containing project, type, action, and/or macro definitions in a portable format for distribution to others who may work on heterogeneous platforms. See also: *export file*, *import*.

## **export file**

A shareable, portable file created by exporting a project.

## **external query**

An ANSI-standard SQL SELECT statement that can be referenced by other Oracle products.

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### **eulins.sql**

The script the database administrator runs to install a Discoverer End User Layer. Use this script to create both public and private End User Layers.

## **F**

### **field**

An interface element in which you enter, edit, or delete data.

### **foreign key**

Key that links a row or column of data in a table to a table in another business area. See: *primary key*.

### **focus**

The state of an entity that is able to respond to input from the user or the client. If an entity has the keyboard focus, it can receive events when the user presses a key. If a drawn view has the drawing focus, it can respond to client routines that affect drawing.

### **folders**

A representation of a database table in the EUL. Presenting tables as folders is another way to shield the end user from the complexities of the database.

## **G**

### **grant**

To give a user access to a module. Only a module's creator can grant its access to other users.

### **GUI**

Acronym for graphical user interface. The use of pictures rather than just words to represent the input and output of a program. Programs with GUIs run under a windowing system (such as X Windows, Microsoft Windows, Apple Macintosh, and so on). GUI programs display icons, buttons, and so on, in windows on the screen; users control the GUI programs mainly by moving a pointer on the screen (typically controlled by a mouse). Also known as a bitmapped interface.

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## **H**

### **hierarchy**

Natural relationships among items, defined in Discoverer Administrator and stored in the End User Layer. Hierarchies enable users to drill up and down through the data to see different levels of detail. There are two types of hierarchies: Item and Date. Use the hierarchy wizard to create new hierarchies, and to edit existing hierarchies.

### **hierarchy wizard**

A predefined set of steps in Discoverer Administrator that ask the user for the information and choices needed to create a hierarchy for use in Discoverer Plus.

## **HTML**

Acronym for Hypertext Markup Language. A tag-based ASCII language used to specify the content and hypertext links to other documents on WWW servers on the Internet. End users with Web browsers view HTML documents and follow links to display other documents.

## **HTTP**

Acronym for Hypertext Transfer Protocol. The protocol used to carry WWW traffic between a WWW browser computer and the WWW server being accessed.

### **hyperdrill**

A way of establishing a link across the system to allow users to drill to details in another worksheet. Requires an existing join between the items or categories in each worksheet.

### **hyperlink**

A reference (link) from some point in one hypertext document to (some point in) another document or another place in the same document. A Web browser usually displays a hyperlink in some distinguishing way (in a different color, font or style). When users activate hyperlinks (by clicking on them with a mouse) the browser displays the target of the link.

### **hypertext**

A collection of documents containing cross-references which, with the aid of a browser, (such as a Web browser or Acrobat Reader, allow readers to move easily from one document to another.

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## I

### **icon**

A graphic representation of a window or tool.

### **identifier**

Identifiers are unique names that Discoverer uses to identify workbooks. When matching objects common to different EULs, Discoverer uses Identifiers to locate objects in different EULs that refer to the same business objects (also known as Conceptually Identical Objects).

For example, a folder named 'Sales' in EUL 'A' may refer to the same folder named 'Sales Figures' in EUL 'B'. Both folders have the same Identifier and can therefore be identified as referring to the same object.

### **image**

A bitmapped object that can be stored and loaded into an application. The client cannot modify an imported image.

### **import**

To read a module from the file system or database, and incorporate it into an application.

### **independent data**

A piece of data that does not depend on other data for its value. For example, an employee's name may have the value *Jones*, which is independent of the values of other employee's names or associated data. Also called category data.

### **index**

An optional structure associated with a table that is used by Oracle Server to locate rows of the table quickly, and (optionally) to guarantee that every row is unique.

### **internet**

A worldwide TCP/IP-based network of computers.

### **IP (Internet Protocol) Address**

A four-part number with no more than three digits in each part that uniquely identifies a computer on the Internet.

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### **item classes**

A grouping of items that database values. An item class is used to define a list of values that may be used by more than one item, an alternative sort order for these items, and/or to define a summary-to-detail capability between items. For example, an item called Product may contain a description of products, and may be part of the Product folder. The same item, Product, may also be required in the Sales Revenue folder. To have both items use the same list of values, you create one item class which defines the values, and apply it to both items. Thus, you only have to define the list of values once. If you did not create an item class, you would have to define a list of values for Product in the Product folder, and for Product in the Sales Revenue folder.

### **item class wizard**

A predefined set of steps in Discoverer Administrator that ask the user for the information and choices needed to create an item class.

### **item hierarchy**

Used to define the hierarchical relationship between items to allow end users to drill down to different levels of detail. For example from Country to Region to State.

### **items**

A representation of database table's column in the EUL. Presenting columns as items allows the Discoverer manager to make formatting changes, name changes and other similar changes enabling the user to clearly read the data. Items are stored in folders and can be created, deleted, and moved among different folders.

## **J**

### **JInitiator**

A software plug-in that ensures a consistent Java Virtual Machine (i.e. the software environment used by Discoverer) between different releases of a browser.

---

## **join**

A logical pairing of tables in a database, based on matching data in a specific column(s). Creating joins in Discoverer Administrator is critical for identifying the folders available to the user in Discoverer Plus. When the user selects an item or folder to create a worksheet, only those folders having joins with the selected folder are available. Thus, if a join does not exist between two folders, neither the unselected folder nor its items are available for the worksheet.

Joins are derived from matching columns or primary or foreign keys in the database.

## **justification**

See *alignment*.

## **K**

### **keyword**

1. Part of a command line syntax that must be supplied with a corresponding argument. 2. A required part of a PL/SQL construct.

## **L**

### **label**

Text identifying the values or meaning of an application's visual objects.

### **list of values**

A set of the unique values that exist in an item. The values are from the items found in the database column.

For example, if a database contained 4 occurrences of widgets, 28 occurrences of bolts, 34 occurrences of fan belts, 90 occurrences of gaskets and 49 occurrences of brackets, list of values would produce the following list of five distinct values: [widget, bolt, fan belt, gasket, bracket]. Lists of values are used when creating and assigning conditions. The list of values is generated automatically at run time.



---

### **load wizard**

A predefined set of steps in Discoverer Administrator that ask the user for the information and choices needed load tables into the End User Layer and create a new business area.

### **local database**

1. The database on the computer running the application. 2. The database to which an application is connected. This database parses and executes all SQL statements generated by the application.

## **M**

### **master folder**

Used in a join, the master folder identifies the table which has a one-to-many relationship with the detail folder. For example, for each video title (identified by a row with a unique key) in a Video Product folder, there may be many entries (rows) in the Sales Details folder for each time a customer has rented the video.

### **master to detail join**

A master-to-detail join icon represents a one-to-many relationship between two items in different folders. The primary key is on left (Master), the foreign key is on right (Detail).

Create joins while using the Load Wizard to create a business area or by choosing Join from the Insert menu. See: *detail to master join, join*.

### **materialized view**

A materialized view is a summary mechanism used by Oracle 8.1.7 databases and later. materialized views pre-compute and store aggregated data for use in SQL queries.

### **megabyte (Mb)**

A unit of memory equal to 1,048,576 bytes (1024 x 1024). Often rounded to one million bytes.

### **message box**

A modal window that notifies you of a condition that occurred because of your last action. You must respond to a message box.

---

**metadata**

Data about data. The data contained in the EUL is metadata because it is information describing the data in the actual database tables. Creating metadata allows the Discoverer manager to translate the database terminology into business terminology.

**modal window**

A window that elicits a response from the operator before the application can continue.

**N****NOCACHE**

A data type indicating that the data will be fetched when the page on which it appears is formatted (instead of fetched and cached until formatted).

**non-caching column**

A report column that references a database column of data type NOCACHE.

**NULL value**

The absence of a value.

**O****object**

An item that can be placed on the layout. The following are examples of objects: rectangle, line, ellipse, arc, polygon, polyline, rounded rectangle, freehand, chart, text, symbol, and text field.

**ODBC**

Acronym for Open Database Connectivity. A standard for accessing different database systems. An application can submit statements to ODBC using the ODBC flavor of SQL. ODBC then translates these to whatever flavor the database understands. Using the Oracle Open Client Adapter (OCA), an application can access different database management systems in one consistent manner. This allows an application developer to develop, compile, and ship an application without targeting a specific DBMS.

---

**OLE**

Object Linking and Embedding.

**OLE container**

An application that can store and display OLE objects.

**OLE Server**

An application that creates OLE objects.

**one-to-many relationship**

A relationship where there is one uniquely identified row in one table relating to one or more rows in another table. The relationship is based on the unique key found in the first table. For example, for each video title (identified by a row with a unique key) in a Video Product table, there may be many entries (rows) in the Sales Details table for each time a customer has rented the video.

**one-to-one relationship**

A relationship where there is one and only one match for a unique row in two tables.

For example, for each video title (identified by a row with a unique key) in a Video Product table, there is one and only one row in the Video Details table that contains the description. Since there is only one description for each product, it could be located directly in the Video Product table; however it could be placed in another table for other processing reasons. In the latter case, the two rows would be uniquely identified by a common key joining them together.

**ORACLE\_HOME**

An environment variable that indicates the root directory of Oracle products.

**Oracle Designer**

An Oracle Corporation tool for system analysis and designing, generating, and maintaining applications.

Oracle Designer uses an enhanced Oracle dictionary for application system designs and model information.

---

### **orphan folder**

A folder which does not exist in any business area. An orphan folder cannot be viewed in the work area because it is not located inside any business area; therefore it is unusable. A folder can only be created (and saved in the End User Layer) inside a business area and potentially used repetitively in several business areas. However, if it is subsequently removed from its last business area without being deleted from the End User Layer, it becomes an "orphan folder".

You can view orphaned folders by choosing Manage | Folders from the Tools menu.

### **own**

A term defining proprietorship of a specific object in Discoverer. For example, a user owns an EUL if its tables reside in the user's database account. A user may have permission to access the tables in another user's account, but the permitted user does not own the EUL.

## **P**

### **page axis**

The axis that displays a page item. The page axis appears above the top axis.

### **page item**

An item that enables you to view data from a particular perspective. Page items apply to a whole sheet. When you create a page item from an axis item or data item, one value appears at a time, such as 1997 for Year. You change the value of the page item—such as 1997, 1998, or 1999—by choosing from the list of available values in the Page item box. items can be dragged to the Page item box from either the top axis or the side axis.

### **parameter**

1. A PL/SQL construct used to pass information to a subprogram. For example, in the subprogram call MYPROC (x),x is a parameter.

### **partially restricted tables**

Tables you own and have granted access to for other user IDs. Or, tables you don't own but their owner has granted you access.

---

**paste**

To place the contents of the Clipboard (cut or copied objects) at the current cursor location.

**pattern**

A graphical property you can apply to the edge or fill of most objects.

**PDF**

Acronym for Portable Document Format. A file format (native for Adobe Acrobat) for representing documents in a manner that is independent of the original application software, hardware, and operating system used to create the documents. A PDF file can describe documents containing any combination of text, graphics, and images in a device-independent and resolution independent format.

**physical page**

The size of a page that is output by your printer.

**pivot**

To drag an item from one axis to the other (crosstabs only), or from an axis to the Page item box. A side axis item becomes a top axis item or a page item or vice versa. Pivoting enables you to display the data more compactly and show relationships between items more clearly.

**PL/SQL**

Oracle's proprietary extension to the SQL language. Adds procedural and other constructs to SQL that make it suitable for writing applications.

**pop-up list**

A list that pops up when the user performs a particular action.

**port**

A number that TCP uses to route transmitted data to and from a particular program.

---

**pre-defined action**

An action shipped with Project Builder and automatically available to the user via a menu item and/or a toolbar button. Pre-defined actions include Build, Deliver, and several source control options. When a pre-defined action is defined for a supported file type, the action is invoked for any selected item of that type when the user calls the action from Project Builder. See also: *action*, *user-defined action*.

**preference**

A setting that affects the behavior of the application's interface.

**primary key**

A column in a database table whose members consist of unique values that can be used to identify a row in a table.

**private End User Layer**

An End User layer only available to specific user IDs. Access is explicitly granted by the owner of the End User Layer.

A database can have one or more private End User Layers.

**private tables**

Tables in a database accessible only by those user IDs granted access by the user ID who "owns" the table. A user ID "owns" a table if that user ID has created the table.

**properties**

A characteristic of an object that determines the behavior or appearance of that object.

**public tables**

Tables in a database accessible by all user IDs.

**Q****query**

1. A search that retrieves information from a database according to criteria you specify. The criteria include items, layout, formatting, conditions, and calculations. Results of a query are displayed in a sheet.

---

2. A SQL SELECT statement that specifies the data you wish to retrieve from one or more tables or views of a database.

**query prediction**

An Oracle Discoverer feature that gives an estimate of the time required to retrieve the information in a query. The Query Prediction appears before the query begins, so you can cancel the query.

**quit**

An option that terminates the current session and returns the user to the operating system. On some systems, Quit is Exit.

**R**

**radio button**

A control (similar to a check box), appearing in sets of two or more, only one of which may be either "on" or "off" at any given time.

**radio group**

A set of two or more radio buttons, only one of which may be either "on" or "off" at any given time.

**RDBMS**

Acronym for Relational Database Management System. A database that allows the definition of data structures, storage and retrieval operations, and integrity constraints. In such a database, data and relations between them are organized in tables.

**record**

One row fetched by a SQL SELECT statement.

**remote database**

A database on a computer other than the local database. Usually a computer on the same network, but at a different node (i.e., a database that you use through a database link).

---

**role**

A set of privileges. A role is assigned to a user ID to grant all of the privileges defined in that role. A role is useful for a DBA assigning the same privileges to large numbers of people.

For example, the database administrator for a staff of airline reservation employees defines the role “reservationist” containing all of the necessary privileges for a reservationist. Then the DBA assigns every reservationist that role (reservationist), instead of having to define all of the privileges for each reservationist.

**row**

One set of field values in a table; for example, the fields representing one employee in the example table EMP.

**run**

To execute a runtime version of an application or program unit.

**S****scheduled workbook**

A workbook that has been programmed to run automatically at a scheduled date, time, and frequency. You can schedule a workbook by choosing File | Schedule.

**schema**

A collection of related database objects, usually grouped by database user ID. Schema objects includes tables, views, sequences, stored program units, synonyms, indexes, clusters, and database links.

**scope**

The level at, or range in which, an object operates. For Project Builder: 1. Describes the range of files affected by Compile and Compile All commands invoked against compilable project items. 2. Describes the range of files influenced by inheritable definitions.

**SELECT statement**

A SQL statement that specifies which rows and columns to fetch from one or more tables or views.



---

**send**

In Discoverer you can mail a workbook (or part of a workbook) in an email. The data you send can be in the text of the mail message or an attachment. In Discoverer Plus, choose File | Send to send a workbook.

**session**

The period between invoking and quitting the executable.

**sheet**

A tab in the workbook window. A sheet displays the results of one or more queries.

**side axis**

The axis of a sheet that runs vertically along the left side of the sheet. Applies only to a crosstab. See: *axis*, *axis item*.

**sort**

To specify how data in an item should be ordered. For example, you can sort an item from low to high (A–Z) or from high to low (Z–A).

**SQL**

Acronym for Structured Query Language, the language used to define and manipulate data in a database. You can view the current SQL code for a particular sheet by choosing SQL Inspector from the View menu.sql file

**SQL script**

A file containing SQL statements that you can run to perform database administration quickly and easily. Several SQL scripts are shipped with Oracle products.

**SQL statement**

A SQL instruction to Oracle. A SELECT statement is one type of SQL statement.

**statement**

A PL/SQL construct used for conditional, iterative, and sequential control, and for error handling. A semi-colon (;) must terminate every PL/SQL statement.

**summary rewrite**

The process that Discoverer Plus uses to rewrite the SQL for a query to use a summary table or materialized view rather than the detail data.

---

### **summary folder**

The folder for storing information about summary tables, and the EUL items that can use them. Summary folders improve performance by directing queries to run against the summary tables' pre-aggregated and pre-joined data which, nevertheless, still satisfies the query requests. The process is automatic from the user's view—that is, to the user it isn't apparent that the query is being handled by the summary folder, instead of the base data tables. The net result is quick response times for queries and accurate results.

### **summary table**

Results from a query, listing information in table format.

### **summary wizard**

A predefined set of steps in Discoverer Administrator that prompt the user for the information and choices needed to create a summary folder that will be used when end user queries are rewritten to use them.

### **syntax**

The orderly system by which commands, qualifiers, and parameters are combined to form valid command strings.

## **T**

### **table**

1. A named collection of related information, stored in a relational database or server, in a two-dimensional grid that is made up of rows and columns.
2. A sheet layout that arranges items in columns. Items appear in the top axis. Use a table to list all information that fits the query criteria, such as sales transactions for the last month. See: *crossstab*.

### **tabular**

A default layout displaying labels at the top of the page and rows of data underneath the labels.

---

**task list**

A window in Discoverer Administrator that lists each task for creating a comprehensive business area in logical order. It is helpful in keeping track of the tasks to complete. Click on a task to invoke its respective wizard to help you complete the task.

**TCP**

Acronym for Transmission Control Protocol. The underlying communication protocol for exchanging HTTP requests between clients and Web servers.

**tear-off menu**

A submenu that the user can remove from its source using a mouse or other pointing device and drag to another part of the display screen.

**text item**

In Form Builder, an item that displays a character string value.

**title bar**

The horizontal area at the top of a window that displays the name of the application or interface element in that window.

**toggle**

To turn a setting alternately on or off. For example, you can hide or show the Toolbar.

**tool**

An iconic button used to create and manipulate objects in an application.

**toolbar**

Collection of iconic buttons that perform product commands. Usually aligned horizontally along the top, or vertically down the side of a window.

**tool palette**

A collection of tools

**total**

The result of a calculation that summarizes data in a sheet. Examples of totals are minimum, maximum, average, and sum.

---

**trailer**

A optional report region that can contain closing material for the report, including text, graphics, data, and computations. The report trailer appears last, following the header and body.

**transaction**

A sequence of SQL statements treated as a single unit.

**trigger**

A PL/SQL procedure that is executed, or "fired," upon a specific event.

**type**

A description of a file type, such as a form, a document, etc., containing such information as type name and description. Each description applies to a single file type. In addition, there are four meta-types: "updtext", which applies to all text files, "updproj" which applies to all project files, "updlink", which applies to all project links, and "all" which applies to any file type. Types are the foundation for defining actions and macros.

**U****user exit**

A way in which to pass control (and possibly arguments) from Developer/2000 to another Oracle product or 3GL, and then return control (and possibly arguments) back to Developer/2000.

**user ID**

a unique character string used to access a database. A user ID always has an associated password. When logging onto an Oracle database, a person must have an authorized user ID and password.

**V****variable**

A named object that can be assigned a value and whose assigned value may change over time.

---

## **W**

### **wildcard**

A character used to mean 'any one character' or 'a contiguous set of characters' within a word or phrase.

### **window**

A rectangular area of the desktop that contains an application. Each window has an area where you can interact with the application. Windows can be opened, resized, moved, reduced to an icon, or enlarged to fill the entire desktop.

### **workarea**

A window in Discoverer Administrator which is the view into the End User Layer. Use the Workarea window to work with each business areas in the End User Layer. It is where you can create new business areas and folders, move items from one folder to another, and create and edit items. Essentially, everything you do that affects the End User Layer is done in the Workarea.

### **workbook**

A collection of worksheets in Discoverer Plus. Workbooks are essentially documents containing query definitions, which can be stored in database tables, network file server and shared with other Discoverer Plus users over a network. They can also be stored on your PC.

### **worksheet**

The way Discoverer displays the results of your query. The Worksheet also contains the query to be executed against the End User Layer. Multiple worksheets are stored in a Workbook.

## **Z**

### **zoom**

To expand an object to allow more room for editing the contents of the field.



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# Index

## Symbols

---

% wildcard, 4-4  
< > operator, 25-120, 25-124  
< operator, 25-120, 25-124  
<= operator, 25-120, 25-124  
= operator, 25-120, 25-124  
> operator, 25-121, 25-124  
>= operator, 25-120, 25-124

## A

---

adding  
    objects to business areas, 4-4, 4-6  
aggregate calculated items  
    about, 11-3  
    and analytic functions, 11-4  
    restrictions, 11-4  
aggregate derived items  
    about, 11-5  
    examples, 11-5  
alternative sort item class  
    creating, 9-18  
alternative sorts, 9-4  
    examples, 9-5  
ASM, 14-9  
    after bulk load using Load Wizard, 14-15  
    command line interface, 14-16  
    how does it work?, 14-5  
    operating system scheduler, 14-16  
    policy, 14-8  
    using a batch file, 14-16  
    ways to run, 14-7  
    what is ASM?, 14-5

assigning user IDs to databases, 4-4  
Automated Summary Management, 14-5  
axis items, 25-95

## B

---

business areas, 1-5  
    about, 4-1  
    building, 4-3  
    components, 4-9  
    copying between EULs, 4-12  
    creating  
        prerequisites, 4-3  
    creating and maintaining, 4-1  
    creating with the Load Wizard, 4-4  
    deleting, 4-13  
    designing, 4-3  
    exporting, 3-16  
    loading objects, 4-4, 4-6  
    opening, 4-11  
    properties, 4-12  
    refresh objects, 4-15  
    synchronizing with the DB, 4-15  
business intelligence  
    about, 1-3

## C

---

calculated items  
    about, 11-2  
    creating, 11-7  
    deleting, 11-10  
    editing, 11-9  
    editing properties, 11-9

- cartesian products, 25-84
- choosing
  - data sources, 4-10
- columns
  - mapping to summary tables
    - example, 15-4
- command line interface, 21-1
  - '?' command, 21-11
  - about, 21-2
  - about command modifiers, 21-2
  - about commands, 21-2
  - apps\_fndnam, 21-11
  - apps\_user, 21-12
  - asm, 21-12
  - cmdfile, 21-12
  - command file examples, 21-8
  - command files, 21-7
  - command reference, 21-11
  - command syntax, 21-6
  - connect, 21-13
  - create\_eul, 21-13
  - create\_eul /apps\_mode, 21-14
  - creating command files, 21-7
  - delete, 21-15
  - delete\_bus\_area, 21-16
  - delete\_eul, 21-17
  - example commands, 21-6
  - export, 21-17
  - import, 21-19, 21-20
  - load, 21-21
  - notes on using, 21-4
  - quick guide, 21-9
  - refresh\_bus\_area, 21-23
  - refresh\_folder, 21-24
  - refresh\_summary, 21-25
  - required privileges, 21-4
  - running command files, 21-7
  - syntax conventions, 21-5
  - using, 21-3
- command line interface modifiers
  - aggregate, 21-27
  - all, 21-27
  - apps\_grant\_details, 21-27
  - apps\_responsibility, 21-27
  - apps\_security\_group, 21-28
  - asm\_space, 21-28
  - asm\_tablespace, 21-28
  - audit\_info, 21-28
  - ba\_link, 21-29
  - business\_area, 21-29
  - capitalize, 21-29
  - condition, 21-29
  - date\_hierarchy, 21-29
  - db\_link, 21-30
  - description, 21-30
  - eul, 21-30
  - external\_element, 21-31
  - folder, 21-31
  - function, 21-32
  - hier\_node, 21-32
  - hierarchy, 21-32
  - identifier, 21-32
  - insert\_blanks, 21-33
  - item\_class, 21-33
  - items, 21-33
  - join, 21-33
  - keep\_folder, 21-34
  - keep\_format\_properties, 21-34
  - log, 21-34
  - log\_only, 21-35
  - lov, 21-35
  - object, 21-35
  - overwrite, 21-35
  - parameter, 21-36
  - password, 21-36
  - private, 21-36
  - refresh, 21-36
  - remove\_prefix, 21-37
  - rename, 21-37
  - schema, 21-37
  - show\_progress, 21-37
  - sort\_folders, 21-38
  - sort\_items, 21-38
  - source, 21-38
  - summary, 21-39
  - user, 21-39
  - workbook, 21-39
  - xmlworkbook, 21-39
- conditions
  - about, 12-1



- adding multiple join, 25-121
- and outer joins, 12-13
- categories, 12-2
- creating complex, 12-7
- creating row level security, 12-16
- creating simple, 12-4
- deleting, 12-11
- editing, 12-10
- editing properties, 12-10
- examples, 12-11
- how they work, 12-3
- types described, 12-3
- CONNECT BY clauses (SQL), 5-6
- connections
  - about, 6-1
  - connections page, 6-3
  - enabling user-defined, 6-9
  - how to create, 6-4
  - public, 6-2, 6-4
  - user defined, 6-2
- content types
  - item content types, 9-11
- cross tab worksheets
  - placing items, 25-95
- custom folders
  - queries and, 5-7

## D

---

- data
  - retrieving, 5-7
- data point items, 25-95
- data sources
  - Oracle Designer and, 4-10
- data types
  - axis items and, 25-95
  - DECIMAL, 25-95
- data warehouses, 1-4
- database links, 25-91
- datatype mismatch
  - in joins, 10-13
- date format 'RR', 13-18
- date format masks, 9-8
- date hierarchies, 13-4
- date items

- applying conditions, 9-10
- applying date hierarchy templates, 13-14
- truncating with EUL\_DATE\_TRUNC, 9-9
- DBMS\_JOB, 14-17
- DBMS\_JOB package, 8-6
- DECIMAL data type, 25-95
- default date hierarchies
  - changing 'RR' date format after Oracle9i upgrade, 13-18
- derived items
  - about, 11-3
- descriptions
  - joins, 25-124
- detail items
  - adding to joins, 25-121, 25-123
  - with no master, 25-84
- detail to master icon, 25-122
- Discoverer
  - about, 1-1
  - access permissions, 7-2
  - components, 1-1
  - data access requirements, 2-2
  - how does it work?, 1-7
  - implementation, 1-7
  - implementing, 1-7
  - maintenance, 1-11
  - security, 7-1
  - system requirements, 2-1
  - task privileges, 7-3
- Discoverer 9.0.2
  - upgrading to, 24-1
- Discoverer Administrator
  - about, 1-1, 1-2
  - about new features, 1-12
  - about the Tasklist, 2-8
  - about the workarea, 2-4
  - basic concepts, 1-4
  - context sensitive menus, 2-8
  - getting started, 2-1
  - online help, 2-9
  - starting, 2-3
  - workarea window, 2-5
- Discoverer logins, 6-1
- Discoverer manager
  - about the role, 1-3

- basic concepts, 1-3
- Discoverer registry settings, 22-1, 22-3
  - about, 22-1
- drill to detail item class, 9-8
  - creating, 9-22
- drilling
  - to other applications, 9-11
- drills, 1-6

## E

---

- End User Layer
  - about, 3-2
  - and analytic functions, 3-30, 24-11
  - changing, 3-10
  - copy objects between databases
    - export using command line interface, 3-20
    - import using command line interface, 3-21
  - copying objects between databases, 3-11
  - creating, 3-6
  - creating and maintaining, 3-1
  - creating for a new DB user, 3-8
  - deleting, 3-9
  - exporting EUL objects, 3-18
  - exporting to a file, 3-11
  - how to export, 3-13
  - importing EUL objects, 3-11
  - importing objects, 3-24
  - in Oracle database, 3-4
  - migration, 3-30
  - owners, 3-3
  - privileges needed, 3-4
  - privileges needed in a non-Oracle DB, 3-5
  - privileges to maintain, 3-5
  - upgrading, 24-11
  - viewing, 3-10
  - why use?, 3-2
- End User Layer (EUL), 1-4
- equality, 25-120, 25-124
- equi-joins, 25-120, 25-124
- EUL Data Definition workbook, 19-8
- EUL Gateway
  - about, 3-6
- EUL status workbooks, 19-1
  - about, 19-1

- Discoverer EUL V.5 business area, 19-2
  - installing, 19-3
  - installing APPs, 19-5
  - running, 19-6
  - uninstalling, 19-7
- EUL upgrade
  - scheduled workbooks, 8-14
- EUL\_DATE\_TRUNC, 9-9
- Export
  - EUL objects using command line interface, 3-20
- export file
  - adding XML code to, 21-31
- Export Wizard, 3-16, 3-18
- exporting EULs, 3-11

## F

---

- fan trap detection, 25-85
- fan traps, 10-8
  - inside complex folders, 10-12
- fetching data, 5-7
- folders, 1-5, 14-2
  - about, 5-2
  - assigning to business areas, 5-17
  - assigning to multiple business areas, 5-17
  - complex, 5-3
  - creating complex, 5-9
  - creating custom, 5-10
  - creating simple, 5-9
  - custom, 5-4
  - custom folder examples, 5-5
  - custom versus simple, 5-5
  - deleting, 5-14
  - dependencies, 5-7
  - editing custom folder SQL, 5-14
  - editing properties, 5-12
  - re-ordering, 5-19
  - sharing across business areas, 5-8
  - simple, 5-2
  - sorting in a business area, 5-18
  - sorting items, 5-18
  - SQL, 5-14
  - using complex instead of DB views, 5-4
  - validating, 5-19

## G

---

gateway  
  loading from, 4-6  
generic connectivity, 23-11

## H

---

help system  
  about, 2-9  
hierarchies, 1-6, 13-1  
  about, 13-1  
  and performance, 13-6  
  applying templates to, 13-14  
  creating date, 13-9  
  creating item, 13-7  
  date, 13-4  
  date hierarchy templates, 13-5  
  date templates, 13-9, 13-13  
  default date hierarchy template, 13-15  
  deleting templates, 13-16  
  editing item, 13-12  
  editing templates, 13-13  
  item, 13-2  
  modifying, 13-18  
hints  
  optimizer, 5-6

## I

---

identifiers  
  locating for workbooks/worksheets in  
    Discoverer Plus, 3-28  
  using to match objects, 25-61  
import EUL objects, 3-24  
Import Wizard, 3-24  
  error messages, 25-62  
importing End User Layer objects, 3-11  
indentifiers  
  about, 3-28  
inequality, 25-120, 25-124  
inline views  
  removing from SQL, 16-4  
integers, 25-95  
item class, 9-2  
  adding items, 9-29, 9-30

  editing, 9-25  
  removing items, 9-30, 9-31  
  viewing items, 9-31  
  viewing list of values, 9-32  
item classes  
  deleting, 9-33  
item content types, 9-11  
item hierarchies, 13-2  
items, 1-5  
  about, 9-2  
  alternative sorts, 9-4  
  content types, 9-11  
  creating alternative sort item class, 9-18  
  creating LOV item class, 9-14  
  date, 9-8  
  date format masks, 9-8  
  deleting, 9-33  
  drill to detail item class, 9-22  
  drill to detail item classes, 9-8  
  editing properties, 9-13  
  item classes, 9-2  
  lists of values, 9-3  
  placing on cross tabs, 25-95  
  viewing list of values, 9-32

## J

---

join icons, 25-122  
joins  
  about, 10-2  
  adding detail items, 25-121, 25-123  
  cartesian products, 25-84  
  conditions  
    adding multiple, 25-121  
  creating multi-item joins, 10-4  
  creating single item joins, 10-3  
  datatype mismatch in, 10-13  
  deleting, 10-7  
  description, 25-121  
  editing, 10-6  
  editing join properties, 10-5  
  fan traps, 10-8  
  many-to-many, 10-3  
  naming, 25-121, 25-124  
  one-to-many, 10-3

- one-to-one, 10-3
- single item and multi-item, 10-2

## L

---

### links

- database to user, 25-91

### list of values

- querying, 5-7
- using custom folders, 9-24

### Load Wizard, 4-3

### LOV item class

- creating, 9-14

## M

---

### maintaining Discoverer, 1-11

### mandatory conditions

- optional condition vs., 12-3

### many-to-one joins, 25-122

### mapping columns

- example, 15-4

### master to detail icon, 25-121

### materialized views

- about, 14-3

### metadata

- Oracle Designer and, 4-10

## N

---

### naming

- joins, 25-121, 25-124

### non-Oracle database support

- Discoverer features implemented

- differently, 23-9

- Discoverer features not supported using native

- ODBC drivers, 23-6

- discoverer features partially supported, 23-7

- software requirements, 23-5

- using native ODBC drivers, 23-5, 23-10

- using transparent gateway, 23-12

- why Discoverer requires a list of database users, 23-9

### non-Oracle database support using generic

- connectivity, 23-11

- about generic connectivity, 23-11
- about the advantages of generic connectivity, 23-12
- how to set up generic connectivity, 23-11

### NUMBER data types, 25-95

## O

---

### object names, 4-10

### objects

- adding to business areas, 4-4, 4-6

### object/schema name

- checking, 14-20

### ODBC drivers, 23-5

### OEM, 18-1

- using to create public connections, 6-4

- using to enable user defined connections, 6-9

### OLTP systems, 1-4

### one-to-many joins

- displaying, 25-122

### one-to-one joins

- creating, 25-85

### online dictionary

- loading from, 4-4

### operators

- set, 5-6

### optimizer, 20-1

### optimizer hints, 5-6

### optional conditions

- mandatory condition vs., 12-3

### Oracle Applications, 17-1

- configuring the Connect dialog, 17-7

- creating an EUL, 17-9

- Discoverer differences, 17-4

- granting task privileges, 17-13

- prerequisites, 17-3

- responsibilities, 17-2, 17-14

- specify users/responsibilities, 17-15

- specifying business areas, 17-14

- specifying tasks, 17-15

- supported features, 17-2

### Oracle Designer

- loading metadata from, 4-10

### Oracle Enterprise Manager (OEM)

- creating public connections, 6-4

- enabling user defined connections, 6-9
- Oracle Portal, 18-3
  - about, 18-4, 18-5
  - adding portlets, 18-8
  - editing portlets, 18-14
  - list of database workbooks portlet, 18-9
  - portlet types available, 18-7
  - requirements, 18-6
  - Worksheet portlet, 18-7
  - worksheet portlet, 18-11
- Oracle Reports, 18-2
- Oracle Warehouse Builder, 18-3
- Oracle WebCache, 18-2

## P

---

- Partially Restricted Tables option, 25-125
- PL/SQL functions
  - custom, 11-11
  - registering, 11-12
  - registering automatically, 11-12
  - registering manually, 11-13
  - why use?, 11-11
- Private Tables option, 25-126
- public connections, 6-4
- Public Tables option, 25-125
- PUBLIC user, 17-13

## Q

---

- queries
  - fan trap detection, 25-85
  - folder definitions and subqueries, 5-6
  - optimizing, 5-7, 20-1
  - performance predictions, 20-1
  - summary tables and, 25-84
- query prediction, 20-1
  - about, 20-1
  - analyzing data tables, 20-5
  - and secure views, 20-9
  - deleting old statistics, 20-10
  - improving speed and accuracy, 20-3
  - in Discoverer Plus, 20-2
  - making views available, 20-3
  - reducing long times, 20-7

- verifying optimizer\_mode parameter, 20-6
- verifying timed\_statistics parameter, 20-4
  - when not available, 20-2
- query retrieval limits
  - setting, 7-10
- query rewrite
  - about, 16-2
  - example, 16-7
- Query Statistics workbook, 19-9

## R

---

- Rdb
  - about the software requirements, 23-1
  - Discoverer support for, 23-1
  - features not supported, 23-3
  - partially supported features, 23-4
  - software requirements, 23-1
- Rdb and non-Oracle database support, 23-1
- reference dialogs
  - list of, 25-1
- refresh options
  - about, 16-13
- registry settings, 22-1, 22-3
  - about, 22-1
- relational databases, 1-4
- restricted tables, 25-125
- result sets
  - complex folders and, 5-4
- roles
  - granting rights and privileges, 7-1
- row level security
  - creating using conditions, 12-16

## S

---

- scheduled workbook limits
  - setting, 7-12
- scheduled workbooks
  - about, 8-1, 8-3
  - and Oracle database features, 8-4
  - backwards compatibility, 8-14
  - DBMS\_JOB package, 8-6
  - prerequisites, 8-5
  - results storage, 8-4

- server frequency check, 8-10
  - specifying owner, 8-7
  - viewing and managing, 8-11
  - why use?, 8-2
  - security
    - business area access, 7-4
    - user/role business area access, 7-5
    - user/role privileges, 7-7
    - user/role to perform task, 7-9
  - SELECT statements, 5-6
  - selecting
    - data sources, 4-10
  - selecting tables and views, 4-8
  - set operators
    - example, 5-6
  - sorting options, 4-10
  - SQL
    - flattened SQL, 16-4
    - in SQL Inspector, 16-4
    - reformatted (flattened), 16-4
    - removing inline views, 16-4
  - SQL and execution plan
    - examples, 16-4
    - viewing, 16-4
  - SQL commands
    - CONNECT BY, 5-6
    - SELECT, 5-6
  - SQL Inspector
    - SQL format, 16-4
  - SQL statements
    - joins and, 25-85
    - optimizing, 20-1
  - start time
    - setting for summary processing, 14-21
  - subqueries, 5-6
  - summary combinations
    - setting up, 15-7
  - summary data
    - why refresh?, 14-8
  - summary folders, 1-7
    - about, 14-2
    - and external summary tables, 16-10
    - and folders, 14-2
    - configuring the database, 14-16
    - creating, 15-9
    - creating based on external summary
      - tables, 15-24
    - creating based on users queries, 15-15
    - creating with ASM, 14-6
    - deleting, 15-36
    - differences between Oracle 8.1.5 and Oracle
      - 8.1.6, 16-9
    - editing, 15-33
    - editing database storage properties, 15-35
    - editing properties, 15-32
    - expressions
      - using, 15-8
    - granting necessary privileges, 14-18
    - how to display them quickly, 22-7
    - manual creation, 15-1
    - manual fresh, 15-31
    - mapping external summary tables and
      - views, 16-12
    - prerequisites, 14-6
    - refresh after import, 16-13
    - refresh following import between Oracle
      - databases, 16-13
    - status, 15-38
    - what happens one is refreshed, 14-9
  - summary management, 14-17
  - summary processing
    - setting start time, 14-21
  - summary redirection
    - about, 16-2
    - when it happens?, 16-3
  - summary tables
    - about, 14-3
    - mapping columns to
      - example, 15-4
    - running queries against, 25-84
  - Summary Wizard
    - using, 14-9
  - synonyms, 5-6
- ## T
- 
- tables
    - selecting for BA, 4-8
  - tablespace quotas
    - determining, 14-19

- resetting, 14-19
- templates
  - date hierarchies, 13-5
- transparent gateway, 23-12

## U

---

- upgrading
  - about, 24-1
  - analytic functions in an EUL, 24-11
  - prerequisites, 24-2
  - step 1
    - back up release 4.1, 24-3
  - step 2
    - upgrade release 4.1 EUL, 24-3
  - step 3
    - refresh summary folders, 24-5
  - step 4
    - migrate users to 9.0.2, 24-7
  - step 5
    - remove release 4.1 EULs, 24-8
  - step 6
    - remove release 4.1 products from client machines, 24-10
    - to Discoverer version 9.0.2, 24-1
- user IDs, 25-126
  - attaching to, 4-4
- users
  - granting rights and privileges to multiple, 7-1

## V

---

- views
  - selecting for BA, 4-8

## W

---

- wildcards, 4-4
- workarea
  - context sensitive menus, 2-8
- workbook export
  - XML format, 21-39
- workbooks, 1-6
  - about, 8-1

- worksheets, 1-6

## X

---

- XML
  - adding to export file, 21-31
  - format for workbook export, 21-39
  - import format, 3-11

