CHAPTER 3

Getting Started in Discoverer
In this chapter, you will learn about the importance of some key members of your Discoverer team. Depending upon the complexity of your environment, you will have one or more of the following: a Discoverer manager, a library manager, a DBA, an Apps administrator, and a report writer. Developing good relationships with these key personnel can be very beneficial in your successful use of Discoverer.

We will introduce you to some important terms that will be useful to your success in using Discoverer, and we will extend the concept of the Discoverer library. You will also learn how Discoverer manages SQL queries and their interaction with your source database. You will come to understand the process that must be followed prior to gaining access to the system, and you will gain some insight into what happens behind the scenes.

We will introduce you to Discoverer’s memory, referred to by Oracle as its “Sticky Feature.” Just before we show you how to launch Discoverer, we give you a list of cool things it can do. Then, at last, you will be launching and logging in to Discoverer.

**Key Personnel**

In all companies, no matter what you call them, there are a number of key personnel with whom you should become familiar. If the size of your organization gets in the way of knowing these people personally, you should at least have a basic understanding of their job function. The key personnel with whom you need to form a relationship are as follows:

- Your Discoverer manager
- Your library manager
- Your database administrator
- Your E-Business Suite administrator (only when using E-Business Suite)
- Your report writer(s)

In some smaller organizations or where Discoverer has not yet gained significant inroads into your company, you may not have separate roles for these job functions. In this case, you may well find that the roles are handled by just one or two people. For the purposes of clarity, we will describe the basic functions of each role separately.

**Discoverer Manager**

The Discoverer manager is probably the most important member of the support staff with whom you need to maintain contact. The Discoverer manager is responsible for the following:

- Maintaining the End User Layer (EUL)
- Maintaining user access to the EUL
- Defining Discoverer strategy and monitoring Discoverer performance
- Setting the default item names and table characteristics (essential for Plus)
- Being a source of help for all Discoverer-related matters

The Discoverer manager works with the individual business unit and library managers to identify the data required for each business area (sometimes called business functions). Oracle has provided
two separate tools: Discoverer Administrator and the Discoverer EUL Command Line for Java. The Discoverer manager works with these tools to create the seamless interface that you will encounter. These tools provide a highly secure, centralized link to the EUL.

**NOTE**
The EUL is the interface between you and the database. What you see when you log in to Discoverer is the EUL. It maintains all of the links between you and the underlying database. Whenever you create a Discoverer query, it is converted into a Structured Query Language (SQL) statement by the EUL. When you submit your query, Discoverer converts it into efficient SQL code and sends it to the database, keeping you from needing to know the underlying database or SQL. In other words, thank goodness for the EUL!

For more information about the roles and responsibilities of the Discoverer manager, including what the Discoverer manager can do for you, please refer to Chapter 19.

**Library Manager**
The library manager is another very important member of the support staff with whom you need to maintain contact. The library manager is responsible for the following:

- Maintaining the approved list of reports within the library
- Accepting or denying requests for new reports
- Accepting or denying requests for access to reports
- Being a source of help to management for report availability

**NOTE**
Library manager is a term that we have created; it is not a tool or component in the Discoverer product family.

The library manager works closely with the Discoverer manager and the report writers within their business unit to identify the reports that are required. Having identified that a new report is required, the library manager then works with one of their department’s report writers to create the report. Once a report has been written and has passed acceptance testing by the users, the manager should take an objective look at the report to make sure that corporate standards have been adhered to and that the report documentation effectively describes what information the report does and how it should be used. Assuming that all standards and documentation are correct, the library manager should take control of the report and make it available within the library. We give an extended definition of a library later in this chapter.

**NOTE**
The library manager does not write the reports. They are working on a higher plane and have more responsibility for report availability and accuracy than for the inner workings of the report.
Database Administrator
Besides being the person we all love to hate, the DBA is a crucial piece of the Discoverer jigsaw puzzle. Without DBAs, the databases would cease to function. Their main responsibilities are as follows:

- Maintaining the databases
- Maintaining user access to the databases
- Defining database strategy and monitoring database performance
- Being yet another source of help

DBAs are a much-maligned group of people and are misunderstood by many. They have an unenviable role in the organization and bear the brunt of everyone’s frustrations whenever the system goes down. The fact of the matter is that systems go down by their very complex nature, and it is the DBA for the most part who gets the system going again.

We are so used to having our systems up and running for 100 percent of the time that a break in service of even 15 minutes seems like a lifetime. The DBA has to find where in this complex system the breakdown is and repair it. Most of the time you don’t even know that a problem existed, because the DBA monitors the system constantly and corrects many problems before they even affect the uptime. So, the next time your system goes down and you feel like venting at your DBA, just get them a pack of cookies from the vending machine instead and go answer some e-mails.

E-Business Suite Administrator
If your company is using Discoverer against E-Business Suite, in other words in Apps mode, this person is key to your successful interaction with the applications. The main responsibilities of the E-Business Suite administrator, as they relate to Discoverer, are as follows:

- Maintain user access to the applications
- Maintain the E-Business Suite responsibilities
- Maintain the E-Business Suite flex field definitions (user-defined data fields available within EBS that organizations can use as required in order to add new data to the system)

Like our beloved DBAs, the E-Business Suite administrators are also much maligned and overworked. As a senior manager once quipped to one of us, “If all the E-Business Suite administrators in the world were laid end to end, they would still not reach a conclusion.” We think the poor, unfortunate administrators he was describing simply had far too much on their plates. So, before you go bending the ear of your administrator, ask yourself whether your request is urgent or whether perhaps it could wait until tomorrow. We are sure you will get a better response, and if this does not work, bribery does!

Report Writers
Within your company, you may be lucky to find that your department or business unit has designated report writers. It is your responsibility to locate and pick the brains of these “superusers.” Report
writers are users just like you, but they have been given added responsibilities and extra training. Their responsibilities may include the following:

- Being your primary source of help for all Discoverer workbook- and worksheet-related issues
- Being a subject-matter expert in Discoverer
- Knowing your business unit’s goals and objectives
- Being the link between the user community and both the Discoverer and library managers
- Being able to submit reports for inclusion in the library

For more information about the roles and responsibilities of report writers, please refer to Chapter 2.

Having learned about the key personnel within your organization, you are now ready to turn to Discoverer itself, but first you will need to have everything set up.

## Gaining Access to Discoverer

Before you can even begin to think about logging in to Discoverer, the following steps will need to have been completed:

**NOTE**

This section assumes that Discoverer is part of a corporate installation. You may want to install Discoverer for testing or trial purposes. You can do that by downloading Discoverer for free from OTN under a developer’s license. Discoverer is easy enough to install that release 11g can be up and running in as little as 20 minutes.

1. If your company is installing Discoverer directly on to your PC, a request will have to be submitted for this to be done. Perhaps your company has decided not to install Discoverer this way and to use a terminal server instead (see the following note explaining terminal servers). In this case, a request will have to be made for that software to be installed. If your access to Discoverer is to be via the Web, your IT department should ensure that you have your company’s standard browser correctly installed and configured. Whichever method your company uses to provide access to Discoverer, we would hope that you will be provided with an icon on your desktop that can be double-clicked to launch the login sequence. This step may sound elementary, but it is amazing how many times these basic requirements are overlooked.

2. You or your manager will need to request that access to Discoverer be made available to you. In the request, you will need to specify which database you need and to which business areas you should be granted access. The request should also contain your telephone number, your position, and whether you need to have full Discoverer access (report writer) or just the ability to run prewritten queries (report viewer).

If you are new to the company, your manager should complete this on your behalf and send it to your library manager or to your Discoverer manager if libraries are not in use.
Perhaps your manager can name another person within your department who has the same access you need and ask for that access to be duplicated. The more information you can give to your Discoverer or library manager, the easier the setup will be.

3. Your library manager will take your request and coordinate it with the DBA, E-Business Suite administrator, and Discoverer manager. If your company is using Discoverer in standard mode, the DBA will create a database account for you, assigning a username and password as determined by your company’s standards. However, if your company is using Discoverer in Apps mode, your Apps system administrator will create an account for you, assigning a username, a password, and one or more responsibilities as determined by your company’s standards.

4. After your DBA or E-Business Suite administrator has created the user account, your Discoverer manager will complete their tasks by granting you access to the required business areas or responsibilities and possibly arranging for you to attend a training course. This course either could be an official Oracle-given course at one of their many training centers or could be given internally if your company has a training department. You might even be in training right now using this book as your text!

5. After your Discoverer manager has completed their tasks, they will pass the request back to the library manager for completion. The library manager will ensure that all relevant reports to which you need access have been shared with you.

6. Finally, when all of the preceding steps have been completed, you will receive notification from your library manager or, if you do not have a library manager, your Discoverer administrator that your account has been set up and has been activated. In this notification, you will be informed of any usernames, passwords, and database connect strings that you may need to use. We say “may” because Discoverer Plus has what are known as public connections. These connections hide the complexity of the login requirements from you. Depending upon the setup within your organization, you may or may not have public connections. If these are in use, the security requirements that are in force within your organization may require you to enter a password. In addition, if you are using Oracle Applications, your Applications responsibility will be made known to you. You will also be informed what user level you have been assigned (report writer or report viewer) as well as having any appropriate reports shared with you. If you are going to be connecting to Discoverer via the Web, you will also be given the appropriate URL.

**NOTE**

If your main database is not located at your work site, your company may well have decided to use one or more terminal servers. These powerful PCs are used as a link between you and the database and have a full working copy of Discoverer 11g Desktop on them. They are usually installed in your data center with a direct connection to the database. You connect to a terminal server from your PC using your network, and then you can use it just as if it were your own PC. The benefits of this approach are reduced network traffic and improved performance. Anyone who has tried running Discoverer from their own PC connected to a database more than 1,000 miles away will know what we mean.

Having had the correct setups completed, you are now ready to use Discoverer.
Key Definitions
Before we get into the Discoverer login sequence, we will explain four key definitions that you need to know.

Workbooks and Worksheets
Discoverer uses workbooks. Anyone familiar with spreadsheets should understand the concept of workbooks. A workbook is a group of worksheets. Each workbook can be thought of as being like an Excel document. Every worksheet in a workbook is a single query (a SQL statement that returns data from the database—see the next section). You can think of worksheets as being like individual Excel spreadsheets. Every worksheet in a workbook will usually be related in some way to the other worksheets, but it does not need to be that way. We recommend, however, that you not keep unrelated worksheets in the same workbook. This makes for sloppy design and difficulties in both maintenance and security.

For example, you may have a workbook that pulls in the data for the sales in your eastern region. One worksheet may have sales broken down by salesperson, another may have sales sorted showing highest sales to lowest by customer, and yet another may show the regional sales compared to last year. The worksheets are related, but each one puts a different spin on the data and answers a different business question. Let’s say you now add a worksheet that shows fixed assets. Any subsequent requests for access to your sales reports cannot be done without also granting access to the fixed asset report. Believe us when we say that this causes problems. We have been there and done that, and it does not work well.

NOTE
Multiple worksheets should be used cautiously at first, and perhaps you should not use them at all in your first few workbooks. The idea behind Discoverer is its ease of use. Getting bogged down in worksheet maintenance is not always to your advantage. Also, having too many worksheets can cause issues with performance and memory, so please do not get carried away. Each worksheet in a workbook is related to its own query.

Queries
We have already used the term query a number of times in this book. However, you may not know what a query is. A query is simply a question that is posed of the database. When you tell Discoverer to run a worksheet, it generates a SQL query and sends the code to the database. Ideally, the answer you expect comes back. An example of a query is “How many blue widgets did we sell in the southwest region last week?” If the query was created correctly, the answer will come back to you in a matter of seconds. Some queries will take a long time, though, especially if you are not careful with your worksheet design. In Chapter 4 we introduce you to the query from the Twilight Zone, the query that seems to run forever, and show you how to construct Discoverer worksheets that avoid this issue.

Reports
As with queries, we have already used the term report several times, and we think it is important that you understand what we mean by a report as opposed to a query, worksheet, or workbook.
A report is a worksheet that has been formatted to a level acceptable for delivery to a department, to the entire company, or even to external customers. Reports use headers and footers, company logos, company colors, fonts, and layout characteristics that adhere to your corporate standards. Finally, we recommend that reports be centrally maintained and administered as a library.

Libraries
A Discoverer library is a collection of reports based around a common theme or business unit. The reports in a library differ from the normal workbooks and reports that are owned by individual report writers. Library reports are

- **Owned by a library manager** The manager will not normally be a real user but a role or responsibility that can be granted to a user. Adopting this method of working ensures the continued existence of the library following the departure of the manager either from the company or from that position. By default, the Discoverer manager also has the library manager role for all libraries.

- **Guaranteed to be accurate and perform efficiently** Candidate reports will have stringent user testing to confirm that they do what they are supposed to do. Before being put forward as candidates for the library, new reports will require user sign-off and documentation.

- **Guaranteed to adhere to corporate standards** These standards will dictate the layout, style, and naming conventions that are to be used. There should be an agreed list of abbreviations to which all library reports will conform. Standard headers and footers will be employed, and the data will be displayed in your corporate colors. A confidentiality statement will be used where necessary. The adoption of these standards ensures that your reports display a corporate image. The library manager is responsible for checking that the standards are being correctly used. Reports that do not conform will be rejected and sent back to the report writer.

- **Centrally documented** Library documents will have meaningful descriptions for the report requirements, column names, and function definitions. Any special requirements such as parameter usage will be explained in detail. There should also be a set of example screenshots from the report. Users will be able to use this documentation to understand what the report does and thus decide whether it satisfies the need they have.

- **Secure with access being strictly controlled** Access to a library report will require a request from either an end user or the end user’s manager. No user will be allowed to change a library report. Following the approval of a request, the library manager will liaise with the Discoverer manager to ensure that the user has access to the relevant business area. When this confirmation has been received, the library manager will share the report with the user. Finally, the user will be informed that their request has been accepted and that the report is now available to them.

- **Maintained centrally** Following a request for a change to a library document, the library manager will consult with the requesting end user or department head and that department’s report writer. The end result of this consultation will be either acceptance or rejection of the request. When a change request is accepted, the library manager will release the workbook containing the report and assign it to a report writer. Following a change, the report will need user testing, sign-off, and updated documentation prior to acceptance back into the library.
Sticky Features
Discoverer has a memory. From time to time, Discoverer will make a note of “last used” options. The next time you are given a choice for one of these options, Discoverer will remember what you last did and default to that setting. These are called Discoverer’s Sticky Features.

Main Features of Discoverer
We have told you how great Discoverer is and how easy it is to use. According to *PC Week*, “Oracle’s Discoverer breaks new ground with its high-performance mix of dynamic and precomputed queries, while its usable interface ensures its power can be put to immediate use.”

We have not told you all of the terrific things Discoverer does. It might be in your mind that all you can do is view data and create queries. This is far from the truth. If you are used to working with spreadsheets or even DOS-based systems, you may not be aware of some of the features that Discoverer has available. The following table shows a list, though not exhaustive, of some of these features.

<table>
<thead>
<tr>
<th>Folders based on tables and views</th>
<th>Items based on columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Descriptions of folders and items</td>
<td>Lists of values</td>
</tr>
<tr>
<td>Joins based on primary- and foreign-key definitions</td>
<td>Default date hierarchies (year-quarter-month)</td>
</tr>
<tr>
<td>Drills to related items, other workbooks, or even hyperlinks</td>
<td>Complex objects (pivots, filters, calculations, functions)</td>
</tr>
<tr>
<td>Complex joins (folders joined to other folders)</td>
<td>Derived items (items based on other items)</td>
</tr>
<tr>
<td>Graphing</td>
<td>Percentages</td>
</tr>
<tr>
<td>Exceptions</td>
<td>Exporting to other applications</td>
</tr>
<tr>
<td>Sorting (simple, group sorting, sort within sort)</td>
<td>Totaling (grand totals and subtotals)</td>
</tr>
<tr>
<td>Formatting (fonts, colors, justification, italics, bold, numeric)</td>
<td>Adding bitmaps to reports (Desktop only)</td>
</tr>
<tr>
<td>Applying titles</td>
<td>Adding page breaks and pagination</td>
</tr>
<tr>
<td>Queries based upon other queries (subqueries, but only in Desktop)</td>
<td>Printing and print preview</td>
</tr>
<tr>
<td>Scheduling</td>
<td>Sharing queries with other users</td>
</tr>
<tr>
<td>Shortcuts</td>
<td>Right mouse button support (context menus)</td>
</tr>
<tr>
<td>Templates for complex calculations</td>
<td>Report parameters</td>
</tr>
</tbody>
</table>

This table by no means includes all of the features of Discoverer but is meant to give you a flavor of what to expect in the coming chapters. Okay, now the bit you have been waiting for. In the next section, you will learn to log in and get started in Discoverer.
Discoverer Login Sequence

From this point forward in the book, we will be describing step-by-step instructions for using Discoverer. We suggest you perform these steps for yourself as a way of reinforcing the skills you are learning. Imagine you are in a classroom and the book is your instructor. We will first of all show you how to connect using Discoverer Desktop, and then we will show you how to connect using 11g Plus and Viewer.

Connecting Using Discoverer Desktop

You launch Discoverer Desktop using the same process you use for all of your Windows applications. You can either use the Start menu or double-click an icon on your desktop.

If your company uses a terminal server for the connection to Discoverer, you should first connect to the terminal server and then launch Discoverer from the Start menu of that machine. Whichever approach your company has adopted, follow the procedures that are the standard in your company. If you are not sure how to log in, you should contact your library manager, report writer, or Discoverer manager.

Having successfully launched Discoverer Desktop, you will be presented with the following login screen.

Enter your username and password in the appropriate fields in the startup screen. You will also need to know and enter the name of the database you want to access. This takes us back to the earlier part of this chapter, on your Discoverer manager and the DBA. Since each company will address these issues uniquely, we can give you only generic instructions.

When you have entered your username, password, and database, click Connect. You will be allowed three attempts to get this right before Discoverer terminates your connection. However, don’t worry, because Discoverer does not lock you out; it only closes and makes you start again.

If you are using Discoverer in Apps mode, you can either type a colon following your username or check the Oracle Applications Userbox. If you successfully connect, you will next be presented with the Choose A Responsibility dialog box. Here you should select the Oracle responsibility that you want to connect using and then click OK.
NOTE
Entering a colon after your username is a trick that tells Discoverer you want to connect using Apps mode. If you know your Apps responsibility, you can type it following the colon.

Launching 11g Discoverer Plus or Viewer
Logging in to Discoverer Plus or Viewer is done via your web browser. Your Discoverer manager will give you a uniform resource locator (URL) for the application as it is stored on your company’s web server. This may sound complicated, but it really isn’t. Just remember to ask for the instructions for launching, and then follow those instructions.

TIP
Don’t forget to add the URL to your bookmarks or web favorites.

Unlike in previous versions of Discoverer Plus where to launch Discoverer you needed to click the large Start button, when you first launch the URL to start Discoverer 11g Plus, the URL that you use will take you straight to the connection screen. The same is true for the 11g Discoverer Viewer. The items presented to you on the connection screen differ depending whether your organization is using Discoverer stand-alone or as part of an application server.

Connecting to a Stand-Alone Instance
When you connect to a stand-alone instance of Discoverer Plus or Viewer, you will see a Connect To Oracle BI Discoverer screen, with a subheading of Connect Directly.

In this illustration you can see that Discoverer offers you a set of connection boxes. Depending upon the type of connection you choose, you will be offered either five or six of the following boxes:

- **Connect To** This is a mandatory drop-down box. Use this box to select the type of connection you want to make. You have three choices. They are
  - **OracleBI Discoverer** Use this option to connect to standard End User Layers.
Oracle Applications   Use this option to connect to Oracle Apps End User Layers.
Oracle BI Discoverer for OLAP  Use this option to connect to the OLAP catalog, which in turn accesses OracleOLAP cubes.
User Name    This is a mandatory box; you must enter your username.
Password     This is a mandatory box; you must enter your password.
Database     This is also a mandatory box, and you must enter the database that you want to connect to. If you are unsure as to what you should enter here, you should contact your Discoverer manager.

NOTE
The connection information is different when you are connecting to a relational or Apps data source and when you are connecting to an OLAP data source.

End User Layer  This is an optional box and will be displayed only if you are connecting to a standard or Apps EUL. If you find that you cannot connect, try entering the name in uppercase.

Locale or Responsibility  This box changes its context depending upon the connection you are trying to make. When you are connecting to a standard EUL or to an OLAP database, this box will allow you to set your language locale. Change this to the language you desire to work in. When you are connecting to an Apps-mode EUL, this box will allow you to type your Oracle responsibility.

After you have entered or selected the information, click Go. Provided that you entered the correct information, Discoverer will open a connection to the selected database. If Discoverer fails to make the connection, you should look at whatever error message is displayed and then take corrective action. In our experience, the most usual connection errors are either that you entered an incorrect username/password combination or that you failed to type the EUL name in uppercase.

Using Public and/or Private Connections
When your system is associated with a metadata repository in which you have installed the necessary schemas, via the Repository Creation Utility (RCU), you will be presented not only with the Connect Directly set of connection information as shown in the illustration in the preceding section but also the Choose Connection dialog.
NOTE

Unlike 10g, where you needed to have an infrastructure database, public and private connections do not rely on an “application server” to be available. In 11g they rely on the connection schemas and the connections having been enabled.

There are two types of connection, public and private. These are described as follows:

- **Public connection**  This type of connection uses a set of predefined connection criteria that have been provided for you by your Discoverer manager. All you need to do is click the connection you want to use. Depending on whether the Discoverer manager has previously set the password for the connection, when you click the connection, you will either be connected directly into Plus or Viewer or be prompted for the password. Not all organizations use public connections, and if you have the correct privileges, you may need to create your own private connection. The information about public connections is stored in the infrastructure database of the application server.

- **Private connection**  This type of connection is predefined by you, or at least by someone who had access to your computer. Because the information about private connections is stored as cookies within the computer, you should use private connections only when you are confident that you will be the only person using the computer. If you are not the only person having access to the computer and you still want to use a private connection, we recommend you create it minus the password. This way, anyone using your computer, including yourself, will always be prompted for the password.
NOTE
Private connections in a stand-alone Discoverer environment use cookies to store details about the connection you create. Therefore, these private connections are available to someone who uses your computer, logs in as you, and uses the same browser; for example, if you create the connection using Internet Explorer and someone else uses Firefox, that user will not see the private connection you created. However, if your company is using single sign-on (SSO), where Discoverer is attached to an infrastructure database, your private connection will be stored within the database and thus be available to you no matter which machine you use.

Public and private connections display identically to one another onscreen. To identify which type of connection is in use, click the Show button alongside the connection name. Clicking Show displays the following additional detailed information about the connection.

As you can see, clicking the Show button displays information about the connection type and the user being used for the login, as well as the database and EUL that are being used in the connection.

As previously stated, public connections are created and maintained by your Discoverer manager. You therefore cannot change these types of connection. However, providing that you have the necessary privileges, you are able to create and work with your own private connections.

NOTE
If your organization is using SSO, you will see an SSO login screen before the Discoverer connection screen. You can see this login screen in the following illustration. You must enter your SSO username and password. This extra level of security is used to authenticate valid users of the system.
Creating a Private Connection  If you can see a Create Connection button, you have the privilege to create your own private connection. If the “create private connection” privilege has not been switched on, then the button is still visible on the Discoverer Plus/Viewer connections page but is grayed out so that it cannot be clicked.

To create your own private connection, follow this workflow:

1. Click the Create Connection button to open the Create Connection dialog box.

2. In the Create Connection dialog box you will notice two sections, Connection Details and Account Details.

3. In the Connection Details section, enter the following:
   a. Connect To  Supply the connection type using the drop-down box provided.
   b. Name  Enter a meaningful name for the connection. It is possible to create a private connection using the same name that exists for a public connection, because connections are stored and identified by their connection ID; however, we do not recommend it. We suggest you always use unique names for your connections.
   c. Description  Enter an optional description for this connection. While this step is optional, should you decide to create a private connection using the same name as already exists for a public connection, we recommend using the description to differentiate your connection from the public one.
   d. Locale  Set the default language for this connection. Unless you want to pick a specific language, we recommend you stick with the default of Locale Retrieved From Browser.

4. In the Account Details section, enter the following:
   a. User Name  Enter the name of the user to connect by.
   b. Password  Enter the password for the user. If you leave this blank, you will be prompted for the password when you run the connection.
Enter the name of the database you want to use for this connection. The name provided here must equate with a name that exists within the TNSNAMES. ORA file on the server. If you do not know the name of the database, you should ask your Discoverer manager.

5. After you have provided all of the preceding information, click either Apply or Apply And Connect. Discoverer will attempt to connect to the database using the criteria that you provided. If you provided valid criteria, the connection will be created, and if you clicked Apply And Connect, the connection will be executed and you will be connected to the database. However, if you entered any invalid criteria, the connection creation will fail, with a message displayed at the top-left corner of the screen.

NOTE
There are two common reasons for a failed connection: you entered invalid username/password combination or you entered an invalid database name. An invalid username/password combination will result in a “ORA-01017: Invalid username/password; logon denied” message, whereas an invalid database name will result in a “ORA-02154: TNS could not resolve the connect identifier specified” message.

6. If the connection criteria that you provided were correct, you may see a further End User Layer dialog box. This box is displayed only when there is more than one EUL available to the user in the database specified. A list of the available EULs will be given. You should select one of them from the drop-down list provided and then click Continue.

7. If you are using E-Business Suite, you may also see an additional Responsibility dialog box. This box is displayed only when you are using Apps mode and you have more than one responsibility available to you. A list of the available responsibilities will be given. You should select one of them from the drop-down list provided and then click Continue.

NOTE
If you see a message saying “You must upgrade your EUL tables to use this software release,” this means you are attempting to connect to a non-11g EUL. This is not allowed.

Editing a Private Connection
If you have previously created a private connection, you have the ability to change its definition. To edit an existing private connection, follow this workflow:

1. Locate the private connection that you want to edit.
2. Click the Update button alongside the connection (it looks like a pencil). This opens a new Update Connection screen.
3. This screen has three components. These are
   a. An area called Connection Details
   b. An area called Account Details
   c. A Change Password button
4. Make the required changes to the Connection Details and Account Details sections.
5. In addition to the changes you can make to the Connection Details and Account Details sections, you will notice that there is an additional, optional button called Change Password. Click this if you want to change the account password. You will need to know the old password to make this change. Having entered a new password, click Apply; you will be returned to the Update Connection screen.

6. Having made all of the updates, click Apply or Apply And Connect.
7. Once again the connection criteria will be validated. If they are valid, the connection information will be changed. If not, you will need to rework the criteria until you have a valid connection.
Deleting a Private Connection  
If you have previously created a private connection, you have the ability to delete it. To delete an existing private connection, follow this workflow:

1. Locate the private connection that you want to delete.
2. Click the Delete button alongside the connection (it looks like a trash can). This opens a new Warning screen.

![Warning](image-url)

3. This screen has three components. These are
   a. The basic information about the connection
   b. The message “You have selected the following connection for deletion. Do you wish to continue?”
   c. No and Yes buttons
4. To delete the connection, click Yes; otherwise, click No or use the back button in your browser to return to the previous screen.

TIP
Unlike Discoverer Desktop, Discoverer Plus is not “sticky” when it comes to logging you in. If you close your browser, it will not remember who you are or where you were last connected. You will have to type these again. This is part of Oracle’s security guidelines.

Starting a Workbook
Assuming you have successfully logged in to either Discoverer Desktop or Plus, you are now on the first screen of the Discoverer Workbook Wizard. In Discoverer Desktop, this wizard has the following six workflow steps:

1. Choose whether to open an existing workbook or to create a new one. If you elect to create a new workbook, you will also be prompted to choose the display type. If you open an existing workbook, the workbook opens and the wizard will close.
2. Select items for your worksheet.
3. Define the screen layout.
4. Define any conditions.
5. Define any sort criteria.
6. Define any calculations.
However, in Plus, Oracle has reduced the number of steps in the wizard to five. These are

1. Choose the worksheet type.
2. Choose items and define conditions and calculations.
3. Define the initial layout.
4. Define an initial sort order.
5. Define parameters.

The steps that you will find in the Plus edition are far more logical than in any of the prior versions of Discoverer. To be honest with you, we never could see the reason for defining the screen layout before defining calculations. This is because you would have to adjust the screen layout again following the addition of any calculations. The new logical ordering of the steps is a big improvement and one that you will surely find easy to work with.

By following the step-by-step instructions, you can start creating queries quickly.

**NOTE**

*It may seem simple enough to use the Workbook Wizard, and you might be asking yourself, “Why do I need this book?” The answer is that using the wizard is easy, but creating an effective query is not. Chapters 11, 12, and 13 will focus on advanced query techniques to help you create better and more complex queries.*

**Summary**

You learned the importance of your Discoverer team: the Discoverer manager, the library manager, the DBA, the Apps administrator, and the report writer. Forging a good relationship with each of these important contacts will be of benefit as you become an expert in Discoverer.

We introduced you to some important terms and features of Discoverer, including managing your workbooks with libraries. You also learned about SQL queries and how Discoverer manages them. We explained about Discoverer’s Sticky Feature. In addition, we gave you a step-by-step procedure for gaining access to the system. Finally, we showed you how to launch Desktop and Plus in preparation to begin using the Workbook Wizard.

In the next chapter, the fun begins! You will be taken through the first steps of the Workbook Wizard to create what might be your first Discoverer query. In Chapter 5, we will cover the remaining steps of the Workbook Wizard, showing how more complex criteria can be added to your queries using the wizard.