

KANSAS AGING MANAGEMENT INFORMATION SYSTEM



AdHoc Queries

Updated February 2006

KAMIS Ad hoc Queries

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Chapter 1

Ad hoc Queries Introduction

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Overview of the Ad hoc Process

Introduction KAMIS Ad hoc Queries is a web based application. However, it is accessed directly through KAMIS Production.

Important In order to access KAMIS Ad hoc Queries you **MUST** have the following software installed:

- Internet Browser
 - Microsoft Internet Explorer 6.0 with all updates
 - Microsoft Excel (optional) – Automatic exporting of data is available for Excel only, however, other exporting options are available. Exporting is covered in detail in Chapter 7.
-

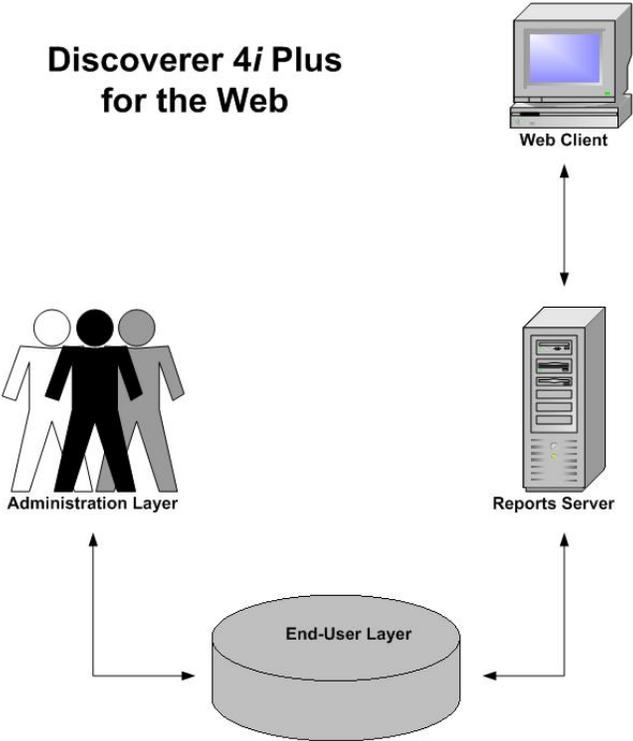
What is Ad hoc The term **Ad hoc** in this case refers to manually creating a report to meet a need for the specific purpose, case, or situation at hand.

How does the Program Work KAMIS Ad hoc Queries uses Oracle 10g Discoverer Plus as the Ad hoc application tool.

Discoverer is a subject-oriented tool. Ad hoc queries are created using business or subject areas instead of a relational database table structure.

Discoverer Components

Introduction There are 3 levels of components of Discoverer.



User Edition This component is used to create Ad hoc queries and workbooks using a web browser.

End-User Layer This component hides the underlying complex relational database by supplying an online dictionary using ordinary business terms. This is the Data Warehouse.

Administration Layer This component is used by KAMIS data administrators to create, maintain, and administer data in the End-User Layer.

Data Administration

Ad hoc Data Administration The Database Administrator converts the relational database table structure of KAMIS Production to the more user friendly business or subject area structure which creates a KAMIS Ad hoc Data Warehouse. Ad hoc queries are processed from the Data Warehouse.

Configuration Compares The below table lists certain statistics relating to the difference in configuration size between the Relational Database structure of the current KAMIS Production system versus the Data Warehouse structure of the Ad hoc Queries system.

Configuration	Number of Tables	Number of Columns
KAMIS Production Database Table	103	1,467
Ad hoc Data Warehouse	28	927

Data Update Data is updated to the KAMIS Ad hoc Data Warehouse once a week due to the time limitation in processing the data from the Production table configuration to the Ad hoc Data Warehouse configuration.

Special Note: This is separate from the KAMIS Pre-Defined Reports. The Pre-Defined Reports will still have the 15 minute data refresh schedule.

Update Schedule The update process is scheduled for Sunday afternoon. This process does take approximately 6 to 10 hours to complete. During that time, data may not be available.

Time Outs Data Administrators have set the following time governors for Ad hoc Queries.

Item	Time Out Limit
Inactivity within the Program	20 Minutes
Report processing	1 Hour

Kansas Department On Aging

KAMIS Adhoc Query Data Schema*



* Users will have access only to data available to their PSA per their KAMIS login ID.
 ** Access to Budget information will be limited to users who have access to Budget information in KAMIS.

INSERT SCHEMA HERE

KAMIS Data Warehouse Definitions

Introduction

The following pages represent the definitions for each item object in Ad hoc Queries.

Chapter 2

Accessing Ad hoc Queries

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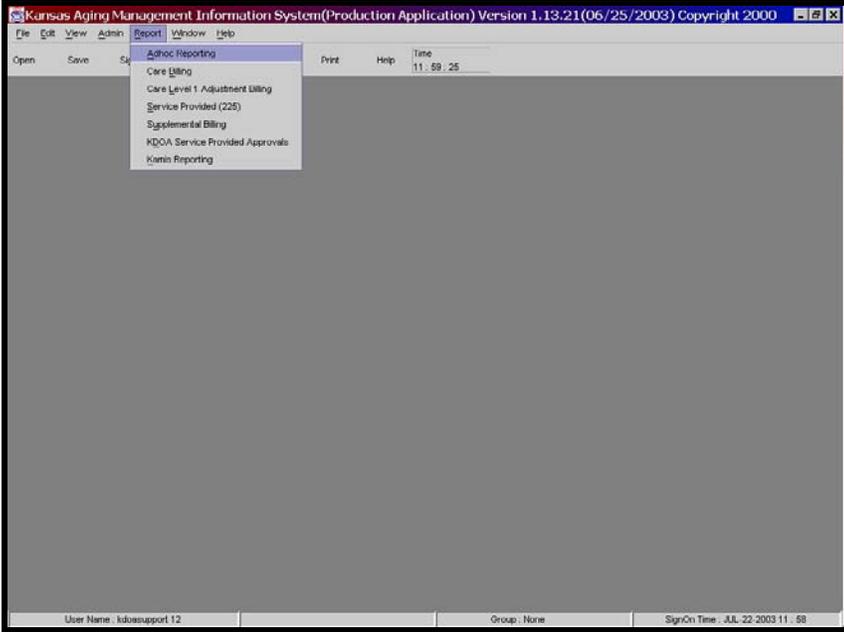
Accessing Ad hoc Queries

Introduction

The KAMIS Ad hoc Queries can only be accessed directly through KAMIS. Therefore, sign-on to KAMIS as normal using the appropriate username profile.

How to

Follow the steps below to access the Ad hoc Queries.

Step	Action	Result
1.	Click on Report on the KAMIS Menu bar.	Drop Down menu is displayed.
 <p>The screenshot shows the 'Kansas Aging Management Information System (Production Application) Version 1.13.21(06/25/2003) Copyright 2000' window. The 'Report' menu is open, displaying options: 'Adhoc Reporting', 'Care Billing', 'Care Level 1 Adjustment Billing', 'Service Provided (225)', 'Supplemental Billing', 'KDOA Service Provided Approvals', and 'Kamin Reporting'. The 'Adhoc Reporting' option is highlighted. The status bar at the bottom shows 'User Name: kdosupport12', 'Group: None', and 'SignOn Time: JUL-22-2003 11:58'.</p>		
2.	Select Adhoc Queries	<p>One of below actions will be taken.</p> <ul style="list-style-type: none"> • The JAVA Browser Plug-in will begin to install – this will occur only if this is the first time Adhoc has been accessed. Instructions follow on the next page. • Adhoc Queries Main Window will be displayed. Instructions continue in Chapter 3.

Browser Plug-In Installation

Introduction

Oracle Discoverer Plus utilizes a JAVA Browser Plug-in. This will install automatically when KAMIS Ad hoc Queries is accessed for the first time. There is also a configuration change that will need to be completed.

How to

Follow the steps below to install the JAVA Browser Plug-In.

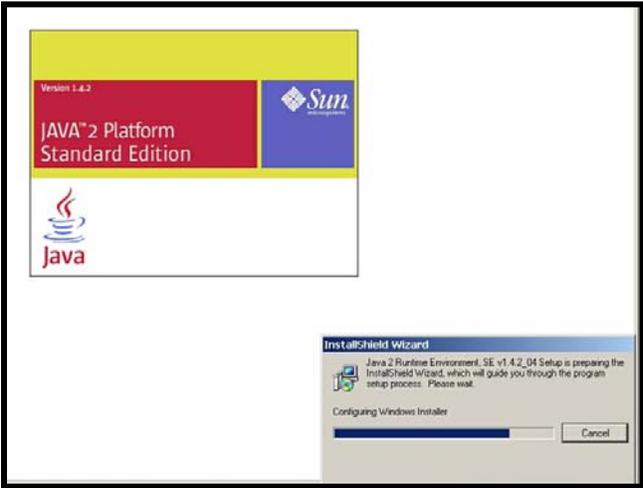
Step	Action	Result
1.	Ad hoc Queries has been selected from the Reports Menu within KAMIS	Download Security Warning will be displayed.



Continued on next page

Browser Plug-In Installation, Continued

How to (continued)

Step	Action	Result
2.	Select Yes	JAVA Installation wizard will begin. License Agreement will be displayed.
		
3.	Select – I accept the terms in the license agreement Then Click on Next	Setup Type Window is displayed.
		

Continued on next page

Browser Plug-In Installation, Continued

How to (continued)

Step	Action	Result
4.	Select Typical , then Click on Next	Version SE v1.4.2._041 will install.
		
5.	Click on Finish	Restart message will display
		

Continued on next page

Browser Plug-In Installation, Continued

How to (continued)

Step	Action	Result
6.	Click on Yes	Your computer will shut down and restart.
		

Plug-In Configuration

Introduction It is imperative that the JAVA Plug-in does not automatically update. Therefore, the automatic update must be deactivated.

Important Oracle Discoverer required the use of the JAVA Environment version 1.4.2_04. If a notice is received that an update is available, cancel this option.

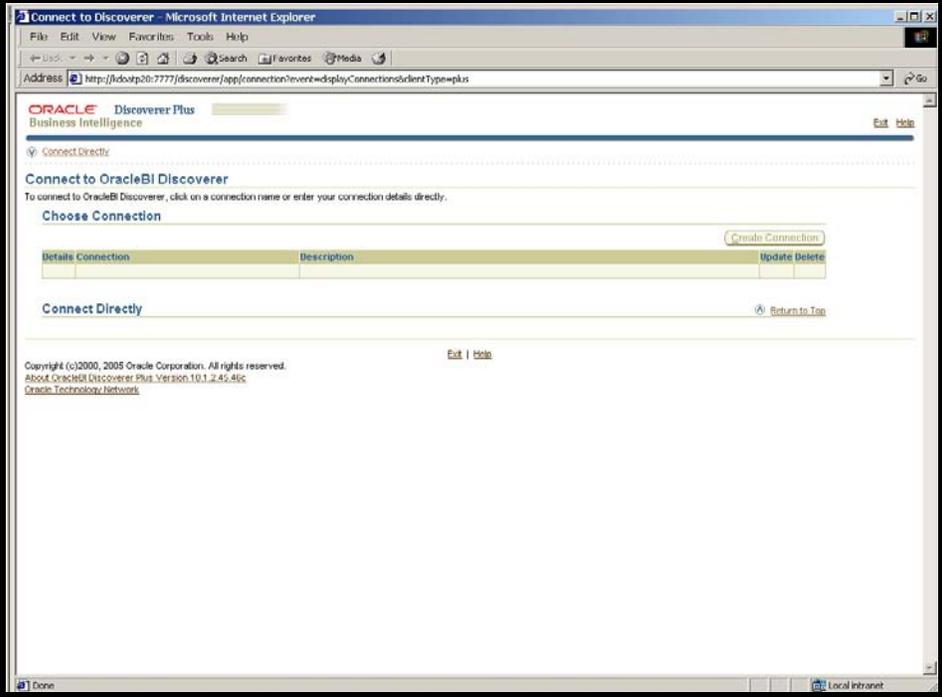
How to Follow the steps below to install the JAVA Browser Plug-In.

Step	Action	Result
1.	Click on Report on the KAMIS Menu bar. Then Select Ad hoc Queries .	Oracle Discoverer Java Applet window will start to load. A Security Warning will be displayed.
		
2.	Select Always .	Window will close and Discoverer Connection Window will be displayed.

Continued on next page

Plug-In Configuration, Continued

How to (continued)

Step	Action	Result
		
3.	Right mouse click on the JAVA icon in the system tray.	Short cut bar will be displayed
		
4.	Select Open Control Panel	JAVA Control Panel is displayed.

Continued on next page

Plug-In Configuration, Continued

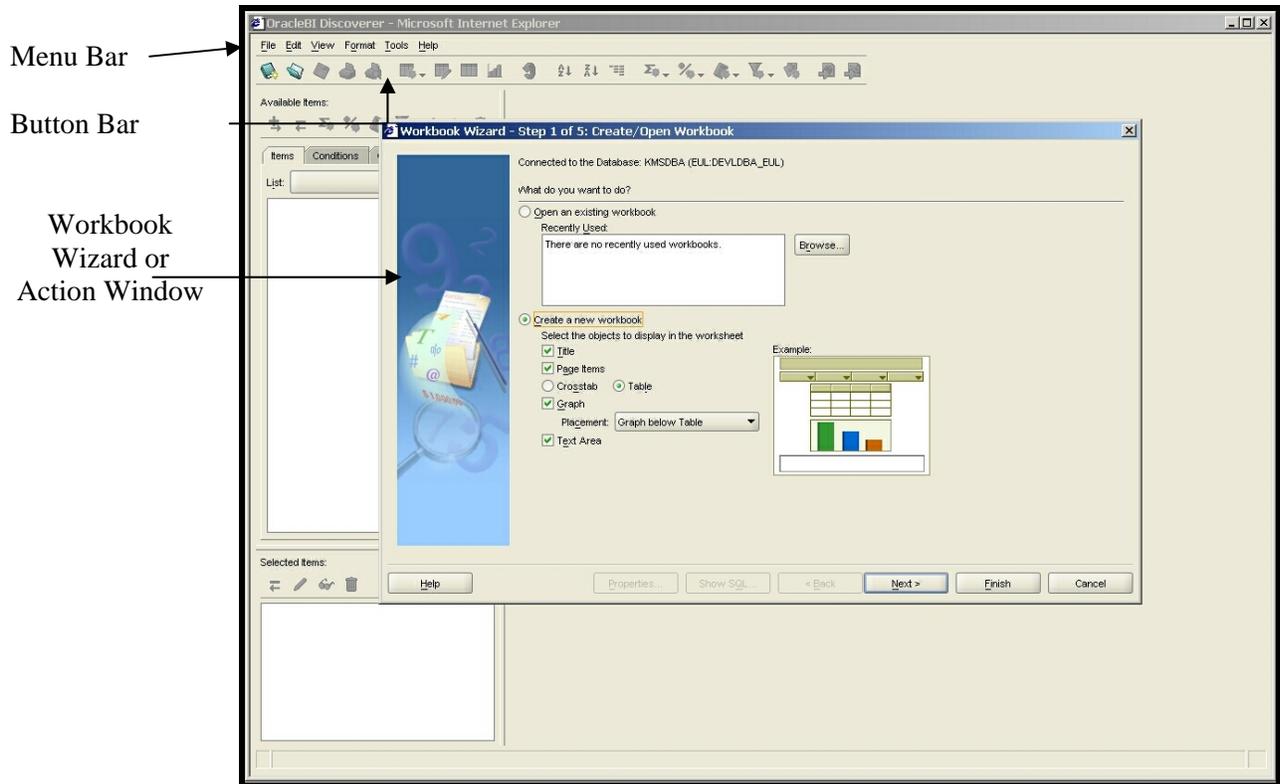
How to (continued)

Step	Action	Result
5.	Select the Update Tab	Information is displayed
 <p>The screenshot shows the 'Update' tab of the Java(TM) Plug-in Control Panel. The 'Check for Updates Automatically' checkbox is checked. The 'Notify Me' dropdown is set to 'Before downloading and before installing'. The 'Update Now' button is visible.</p>		
6.	Uncheck the option “Check for Updates Automatically”	Option is deactivated.
 <p>The screenshot shows the 'Update' tab of the Java(TM) Plug-in Control Panel. The 'Check for Updates Automatically' checkbox is now unchecked. The 'Update Now' button is visible.</p>		
7.	Click on Apply	
8.	Close the Control Panel by the “x” in the upper right hand corner of the window	Window closes. Main Window is displayed.

Main Queries Window

Overview

Once the JAVA Browser Plug-In is installed, the main window or workbook window of the KAMIS Ad hoc Queries will be displayed.



Signing-off Ad hoc Queries

Introduction There is not a log-out process for the Ad hoc Queries Site.

How to Follow the steps in the table below to close the Browser.

Step	Action	Result
1.	Close browser as appropriate. <ul style="list-style-type: none">• Click the <input checked="" type="checkbox"/> in the upper right corner of the window.• On the Menu Bar, click on File then close or exit.	The following dialog box will be displayed.
		
2.	Click on Yes	Browser will close.

Chapter 3

Discoverer Windows, Menus, and Toolbars

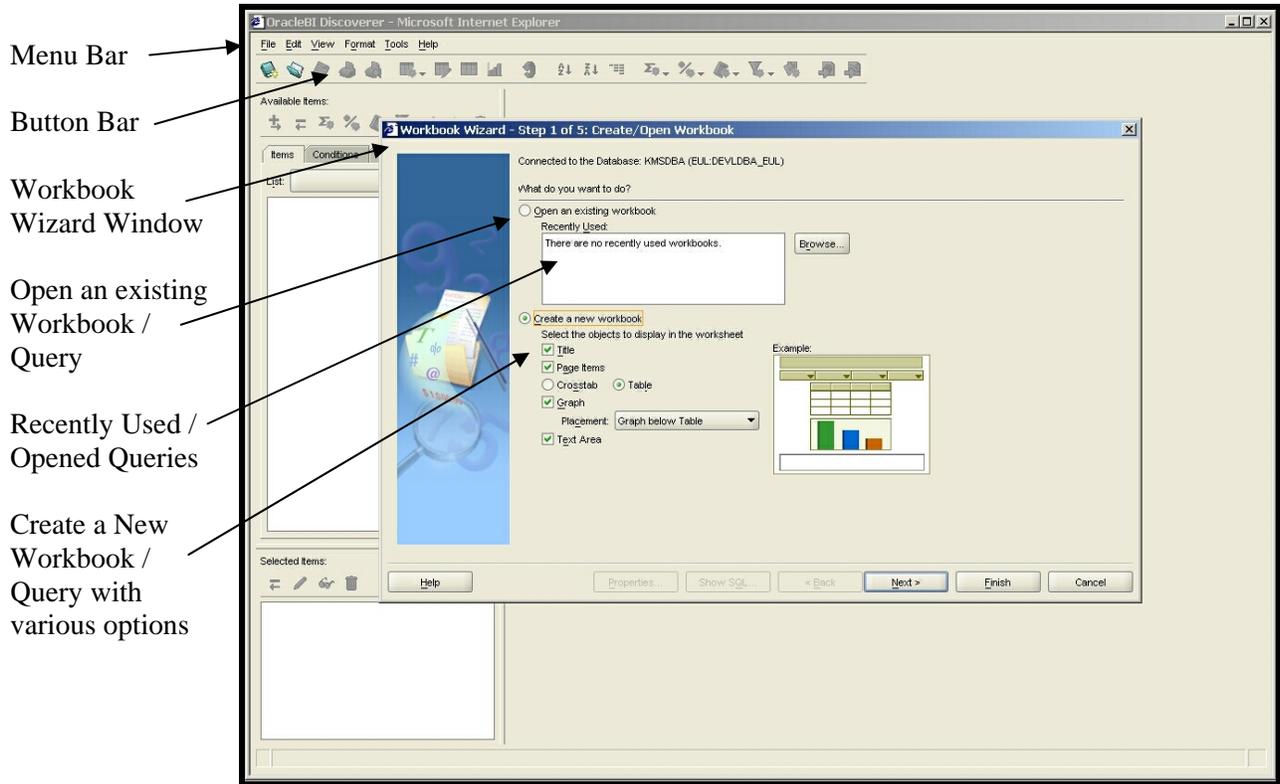
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Workbook Wizard Window

Overview All queries, no matter how complex, begin with the Workbook Wizard.

When Discoverer is launched within KAMIS, the workbook wizard is displayed.



Menu Bar Options

Menu Bar Options

Discoverer provides a standard menu bar and toolbar. Each menu selection provides a dialog box or wizard to assist in performing the specific task.

Below are the options and functions on each menu item.

File

Function	Description
New	Activates the new workbook wizard.
Open	Opens a saved workbook template.
Close	Closes the current workbook.
Save	Saves the workbook template to the database.
Save As	Saves the workbook template to the database but give the option of changing the name.
Schedule	Not a current option.
Print	Prints the workbook / worksheet.
Export	Activates the Export Wizard.
Export to HTML **	Exports automatically to html format
Export to Excel **	Exports automatically to Microsoft Excel format
Manage Workbooks - Sub menu includes:	
Scheduling Manager	Not a current option.
Sharing	Not a current option.
Delete	Deletes a workbook template from the database.
Properties	Information about the current workbook. <u>Example</u> : Date created, date revised, owner and background information can be entered that further identifies the workbook.
Exit	Closes workbook and exits Discoverer.

* - Recommendation is not to use these toolbar options. The export wizard is not launched with these options. Therefore, there is an option available to name the file or to select the save location.

Edit

Function	Description
Undo	Will undo the previous action.

Continued on next page

Menu Bar Options, Continued

Sheet

Function	Description
New Sheet	Inserts a new worksheet.
Edit Sheet	Displays the Edit dialog box.
Duplicate as Table	Duplicates the current worksheet as a table.
Duplicate as Crosstab	Duplicates the current worksheet as a crosstab.
Table Layout	Displays the table layout dialog box.
Format	Displays the format dialog box.
Rename Sheet	Displays the rename dialog box.
Delete Sheet	Deletes the current worksheet.
Move Sheets	Displays the move sheet dialog box.
Edit Parameter Values	Displays the parameter dialog box.
Refresh Sheet	Refreshes the current worksheet. Query is processed.
Show SQL	Displays the SQL “behind the scenes” programming code box.

Tools

Function	Description
Conditions	Displays the Conditions dialog box.
Sort	Displays the Sort dialog box.
Table	Displays the Table Layout dialog box.
Percentages	Displays the Percentages dialog box.
Calculations	Displays the Calculations dialog box.
Parameters	Displays the Parameters dialog box.
Options	Allows the view, format and processing options for all workbooks to be changed.

Continued on next page

Menu Bar Options, Continued

Graph

Function	Description
New Graph	Activates the Graph Wizard
Edit Graph	Displays the Edit dialog box
Delete Graph	Deletes the current graph.
Display Graph - Sub menu includes:	
Separate Window	Displays the graph in a separate window from the worksheet.
Right of Data	Displays the graph to the right of the worksheet data.
Left of Data	Displays the graph to the left of the worksheet data.
Below Data	Displays the graph below the worksheet data.
Above Data	Displays the graph above the worksheet data.
Hide Graph	Hides the graph
Fit to Window	Automatically sizes the graph to fit the program window. Default as selected.
Show Legend	Automatically displays the Legend. Default as selected.
Show Toolbar	Automatically displays the Graph Toolbar. Default as selected.
Show Page Items	Automatically displays the Page Items on the graph. Default as selected.

Help

Function	Description
Help Topics	Discoverer on-line help.
About Discoverer	Displays the version and other configuration information regarding Discoverer.

Tool Bar Options

Tool Bar Options

The toolbar contains icons for the most common menu options, such as printing, saving, refresh and edit worksheet.

Below are the options and functions of each icon.



Icon	Function
	New Query Wizard is activated.
	Opens an existing Workbook template on the database
	Saves the current workbook to the database
	Prints the current worksheet
	New Worksheet – Adds a new worksheet and activates the New Query Wizard
	Duplicates current worksheet as a Table
	Duplicates current worksheet as a Crosstab
	Edit Worksheet dialog box is displayed
	Table Layout dialog box is displayed
	Refreshes the Worksheet – Query is processed.
	Graph Wizard is activated
	Sort dialog box is displayed
	Totals dialog box is displayed

Continued on next page

Tool Bar Options, Continued

Tool Bar Options (continued)

Icon	Function
	Percentage dialog box is displayed
	Calculations dialog box is displayed
	Conditions dialog box is displayed
 **	Automatically Export as HTML
 **	Automatically Export to Excel

** - Recommendation is not to use these toolbar options. The export wizard is not launched with these options. Therefore, there is an option available to name the file or to select the save location.

Terminology

Introduction There are certain terms that are used within Discoverer and this manual. The definitions are listed below.

Including Items in a Query **Workbook:** A collection of worksheets.

Worksheet: A worksheet is generated when a query is processed.

Workbook Template:

Business Area: A group of related folders in the End User Layer. KAMIS Ad hoc Queries has only one Business Area – KAMIS Data Warehouse.

Folder: An object in Discoverer that represents a table or a combination of database columns or derived columns. If a folder is selected for inclusion, all of its items are included in the query.

Chapter 4

Workbook Wizard

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Overview of the Wizard

Introduction All queries, no matter how complex, begin with the Workbook Wizard.

When Discoverer is launched within KAMIS, the workbook wizard is displayed. This is the first of five steps in creating a workbook.

There are two options available:

- Create a new workbook

Open an existing workbook. Existing workbooks are Templates that have been previously saved on the KDOA Reports Server.

The Wizard Window

Step Indicator

Step Detail Area

Output Style Options

Help

Properties...

Show Help

Next >

Finish

Cancel

Current Step On-Line Help

Forwards to the next step

Completes the Query without advancing through additional steps

Stops and closes the Wizard

Step 1: Create/Open Workbook

Introduction All queries, no matter how complex, begin with the Workbook Wizard.

When Discoverer is launched within KAMIS, the workbook wizard is displayed. This is the first of five steps in creating a workbook.

There are two options available:

- Open an existing workbook. Existing workbooks are Templates that have been previously saved on the KDOA Reports Server.
 - Create a new workbook.
-

Templates Templates are created to define your output style which determines how the results are displayed. No data results are saved with the template.

Open an Existing Workbook This option will allow the selection of a previously configured and saved workbook. The data is not saved, just the output style and configuration of the query.

The query configuration and formatting can be changed after the query has processed. Editing configurations are covered in **Chapter 5**.

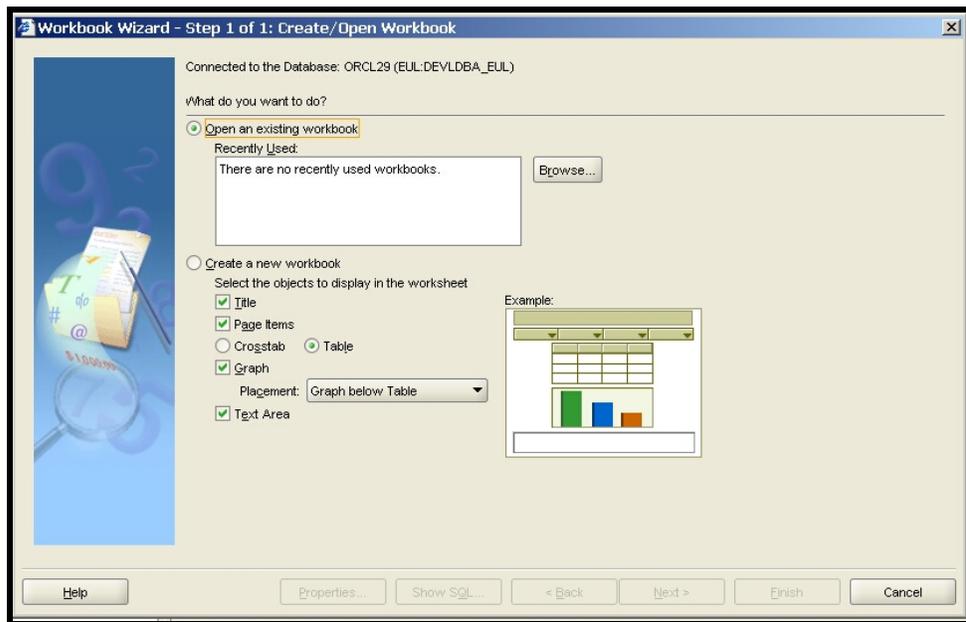
Workbooks are saved on the KDOA Reports server. Users of the same Organization will see all workbooks saved for their particular organization (KDOA, AAA, or Nutrition Provider). Saving a workbook is covered in more detail in **Chapter 6**.

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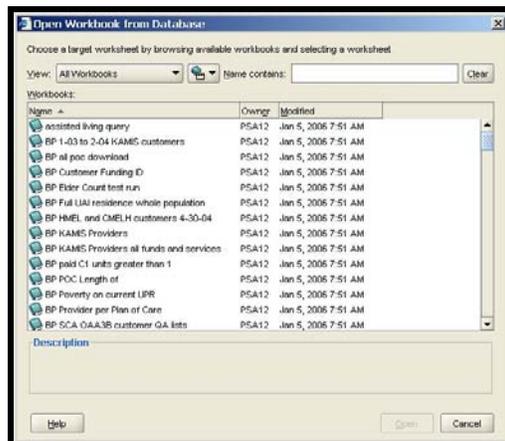
Step 1: Create/Open Workbook, Continued

How To Follow the steps in the table below to Open an existing Workbook.

Step	Action	Result
1.	Select the Open an existing workbook radio button.	



2.	Click on the Browse button	Open Workbook from Database window will be displayed.
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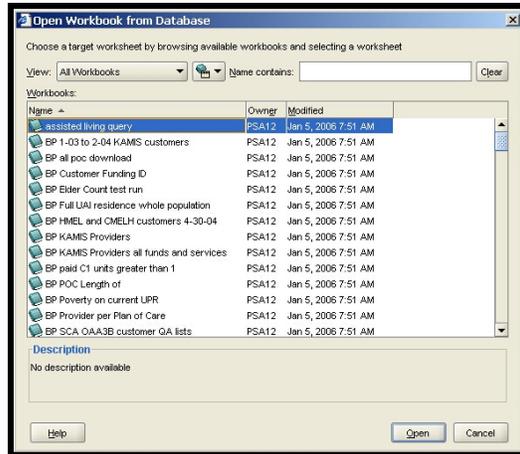


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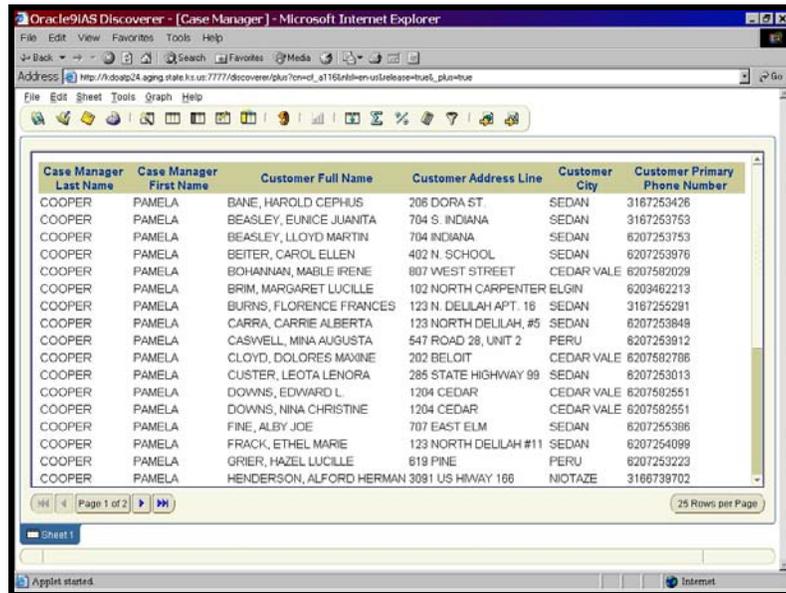
Step 1: Create/Open Workbook, Continued

How To (continued)

Step	Action	Result
3.	Select the workbook template to be opened.	Selection will be highlighted.



4.	Click on the Finish button	Workbook will run the query and open at the results window.
----	-----------------------------------	---



Step 1: Create/Open Workbook, Continued

Creating New Workbooks

When Discoverer is launched within KAMIS, the workbook wizard is displayed. This is the first of five steps in creating a workbook.

How To

Follow the steps in the table below to create a new workbook.

Step	Action	Result
1.	Select the Create a new workbook radio button.	

Continued on next page

Step 1: Create/Open Workbook, Continued

How To (continued)

Step	Action	Result																		
2.	Select the output style options as desired.	See below for the descriptions of the options available.																		
	<table border="1"> <thead> <tr> <th>Option</th> <th>Default Selected</th> <th>Style Description</th> </tr> </thead> <tbody> <tr> <td>Title</td> <td>Yes</td> <td>Allows a space at the top of the worksheet for a title</td> </tr> <tr> <td>Page Items</td> <td>Yes</td> <td>Displays the Page Item Grouping Area. A page-detail layout is a table produced for each value of the page item, such as a page per county. The items on the page area appear as a drop-down list, from which different values can be selected.</td> </tr> <tr> <td>Table Styles</td> <td></td> <td></td> </tr> <tr> <td>- Crosstab</td> <td>No</td> <td>Crosstab tables have values running across the top, down the left edge, and in the intersection of rows and columns. The values are usually summarized to show a total or an average.</td> </tr> <tr> <td>- Table</td> <td>Yes</td> <td>Data will be arranged in table style with top columns of information with headings.</td> </tr> </tbody> </table>	Option	Default Selected	Style Description	Title	Yes	Allows a space at the top of the worksheet for a title	Page Items	Yes	Displays the Page Item Grouping Area. A page-detail layout is a table produced for each value of the page item, such as a page per county. The items on the page area appear as a drop-down list, from which different values can be selected.	Table Styles			- Crosstab	No	Crosstab tables have values running across the top, down the left edge, and in the intersection of rows and columns. The values are usually summarized to show a total or an average.	- Table	Yes	Data will be arranged in table style with top columns of information with headings.	
Option	Default Selected	Style Description																		
Title	Yes	Allows a space at the top of the worksheet for a title																		
Page Items	Yes	Displays the Page Item Grouping Area. A page-detail layout is a table produced for each value of the page item, such as a page per county. The items on the page area appear as a drop-down list, from which different values can be selected.																		
Table Styles																				
- Crosstab	No	Crosstab tables have values running across the top, down the left edge, and in the intersection of rows and columns. The values are usually summarized to show a total or an average.																		
- Table	Yes	Data will be arranged in table style with top columns of information with headings.																		

Continued on next page

Step 1: Create/Open Workbook, Continued

How To (continued)

Step	Action	Result	
	Option	Default Selected	Style Description
	Graph	Yes	The data will also be displayed in a graph. However, not all information can be graphed. If the data will not lend itself for graphing the area will be blank.
	- Placement	Below Table	Placement of where the graph will be displayed on the screen.
	Text Area	Yes	User free text area. Options available to display the date, file name, custom help text, etc. at the bottom of a worksheet.
3.	Click on the Next button.	Workbook Wizard will advance to Step 2. Step 2 is continued on page 9.	

Step 2: Select Items – Data Fields

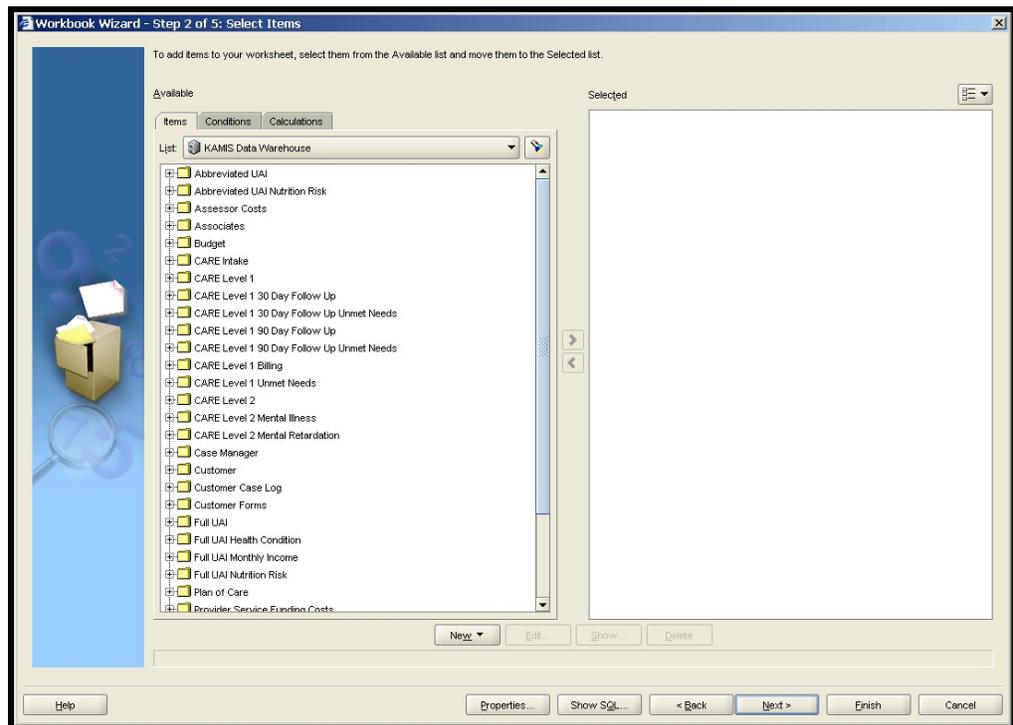
Introduction

This step of the wizard contains the three areas – the Item selection, the Conditions and the Calculations.

The Item Selection area lists all the folders and items in which the AdHoc Administrator has configured in the End User Layer of Discoverer.

The Conditions area places criteria upon the data to be selected and displayed.

The Calculations area places calculations, totals and percentages upon the data to be selected.



Continued on next page

Step 2: Select Items – Data Fields, Continued

Symbols

Items are selected from this list to include in the result. The wizard uses the following symbols:

Symbol	Description
	Business Area: A group of related folders in the End User Layer. KAMIS AdHoc Queries has only one Business Area – KAMIS Data Warehouse.
+ - 	Folder: A plus sign indicates that there is another level in the hierarchy that is not displayed but can be opened.
	Folder: A minus sign indicates that the next level in the hierarchy is displayed
	Axis Items: A column from a table. (If an item is selected for inclusion, all values that the item can assume are included in the search. You must include one or more data-point items in a crosstab query).
 North	Item Value: an item in a list of values (LOV).
 SUM	Aggregation: a mathematical function for aggregating data. For text items (e.g. Region), the typical aggregations are Count, Max, and Min. For example, you can count the number of Regions items, or find the highest or lowest (where A might be the highest and Z the lowest). For numeric items, typical aggregations are Sum, Count, Max, Min, Average, and Detail. For example, you can find the Sum or Average of the numeric data. The default aggregation (specified by the Discoverer manager) is displayed in bold.
	Numeric Item: The values of numeric items can change as you analyze the data (e.g. summing profits will produce different results for cities than for regions). Numeric items behave as axis items on table worksheets and correspond to the data in the body of a crosstab.

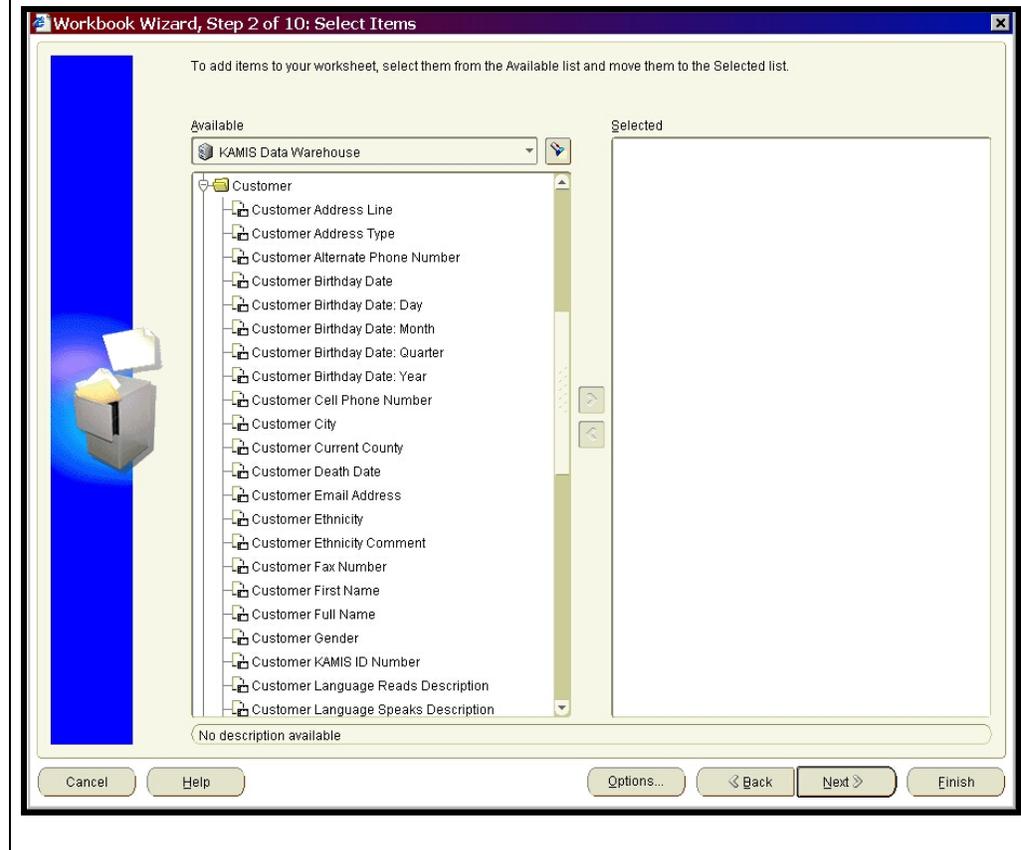
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Step 2: Select Items – Data Fields, Continued

How to

Follow the steps in the table below to select items for your worksheet.

Step	Action	Result
1.	Expand the Business Folder as appropriate. Click on the Plus sign or Double Check on the Folder.	All items within the folder will be displayed.



Continued on next page

Step 2: Select Items – Data Fields, Continued

How to (continued)

Step	Action	Result
2.	Select the items as appropriate.	Items are highlighted.

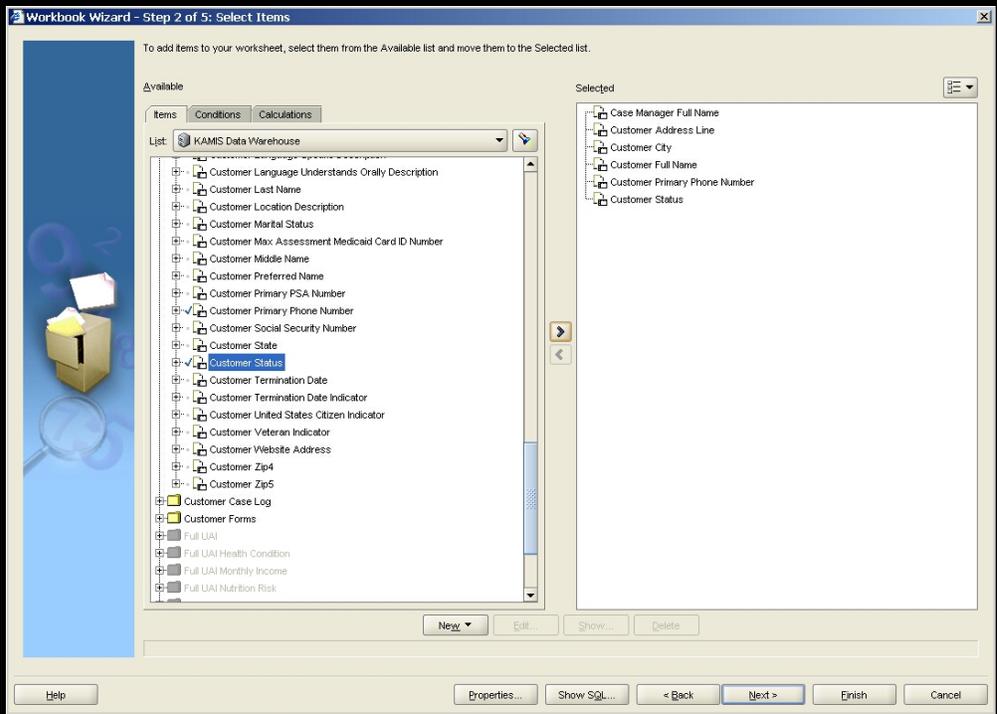
The screenshot shows the 'Workbook Wizard - Step 2 of 5: Select Items' dialog box. The 'Available' list on the left contains various customer data fields, with 'Customer Full Name' selected. A tooltip for 'Customer Full Name' shows 'Name: Customer', 'Gender: Customer', and 'Folder: Customer'. The 'Selected' list on the right contains 'Case Manager Full Name', 'Customer Address Line', 'Customer City', 'Customer Full Name', and 'Customer Primary Phone Number'.

Note: A tool tip will display as your mouse moves over the selection which will show the field name and the folder the field resides in.

Continued on next page

Step 2: Select Items – Data Fields, Continued

How to (continued)

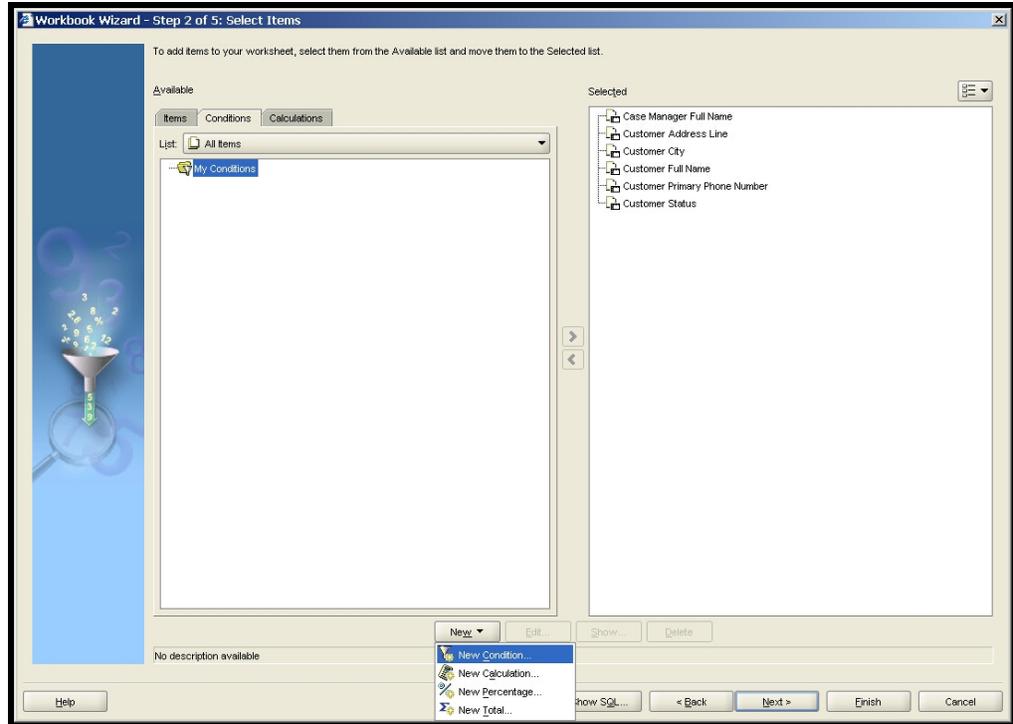
Step	Action	Result
3.	Move the selected item(s) to the Selected list	Items will be included in the query.
<div style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Navigational Options</p> <ul style="list-style-type: none"> Drag the item from the Available list into the Selected list. Select the item and then click the right arrow button. Press and hold the {Ctrl} key to select more than one item. </div>		
		
4.	Click on the Conditions tab	Workbook Window will advance to the Conditions area.

Step 2: Select Items – Simple Conditions

Introduction

This step of the wizard contains the Conditions that enable the data to be filtered and displayed on the results window of a worksheet.

Conditions Window



Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To

Follow the steps in the table below to create a simple condition.

Step	Action	Result
1.	Click on the drop down button and select New Condition	The New Conditions dialog box will be displayed.

What would you like to name your condition?

What description would you like to give your condition?

Generate name automatically

Formula

Item	Condition	Values
:	=	

Case-sensitive

This condition is located in the workbook 'Workbook 1'.

Help OK Cancel

Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To (continued)

Step	Action	Result
2.	What do you want to name this condition?	The default is set to have Discoverer generate a name automatically. The name is based on the condition syntax. <u>Optional:</u> De-select the check box and manually enter a desired name for the condition.
3.	What description do you want to give your condition?	Will identify the condition to others. The description is shown on the condition dialog box. Hints and tips about when to use the condition could be added here.
4.	Define the condition statement in the Formula area	

The screenshot shows the 'New Condition' dialog box. It contains the following elements:

- Name:** A text box for naming the condition and a checked checkbox labeled 'Generate name automatically'.
- Description:** A text box containing the text 'Select only active status customers'.
- Formula:** A section titled 'Formula' with the instruction 'Type the name of an item or select a name from the drop-down list.' It features a table with columns 'Item', 'Condition', and 'Values'. The 'Item' dropdown is open, showing a list of items:

Item	Condition	Values
:	=	
Case Manager.Case Manager First Name		
Case Manager.Case Manager Last Name		
Customer.Customer Address Line		
Customer.Customer City		
Customer.Customer Full Name		
Customer.Customer Primary Phone Number		
Customer.Customer Status		
More Items...		

Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To (continued)

Step	Action	Result
5.	Select the Item in the drop down listing	The Item drop down list shows the items available to the worksheet that can be used in the condition. Not just the items selected in Step 2. Items that are not currently displayed on the worksheet can be used to filter the worksheet data.
6.	Select the Condition in the drop down listing	This will choose how to match the data against the item selected.

What would you like to name your condition?

What description would you like to give your condition?

Formula

Select a conditional operator from the drop list.

Item	Condition	Values
: Customer.Customer Status	=	

Case-sensitive

This condition is located in the workbook

Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To (continued)

Step	Action	Result
7.	Type the Value of the condition.	This is the information the condition will use for the filter.

What would you like to name your condition?
(Customer Status = 'active') Generate name automatically

What description would you like to give your condition?
Select only active status customers

Formula

Item	Condition	Values
Customer.Customer Status	=	'active'

Case-sensitive

This condition is located in the workbook 'Workbook 3'.

Help OK Cancel

Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To (continued)

Step	Action	Result
8.	A value can also be created by selecting items in the drop down list.	Conditions can be created by calculations, selecting another item to compare or creating a new or use an existing parameter.

What would you like to name your condition?

What description would you like to give your condition?

Select only active status customers

Formula

Type text in single quotes or select a value from the drop-down list. Multiple values must be separated by commas.

Item	Condition	Values
: Customer.Customer Status	=	

Advanced >>

Case-sensitive

This condition is located in the workbook *Workbook 3*.

Help OK Cancel

Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To (continued)

Step	Action	Result
9.	Case-Sensitive check box. <u>Recommended:</u> Uncheck this selection.	This check box will limit the results according to case.

The screenshot shows the 'New Condition' dialog box with the following details:

- Title: New Condition
- Name field: (Customer Status = 'active')
- Generate name automatically:
- Description field: Select only active status customers
- Formula section:

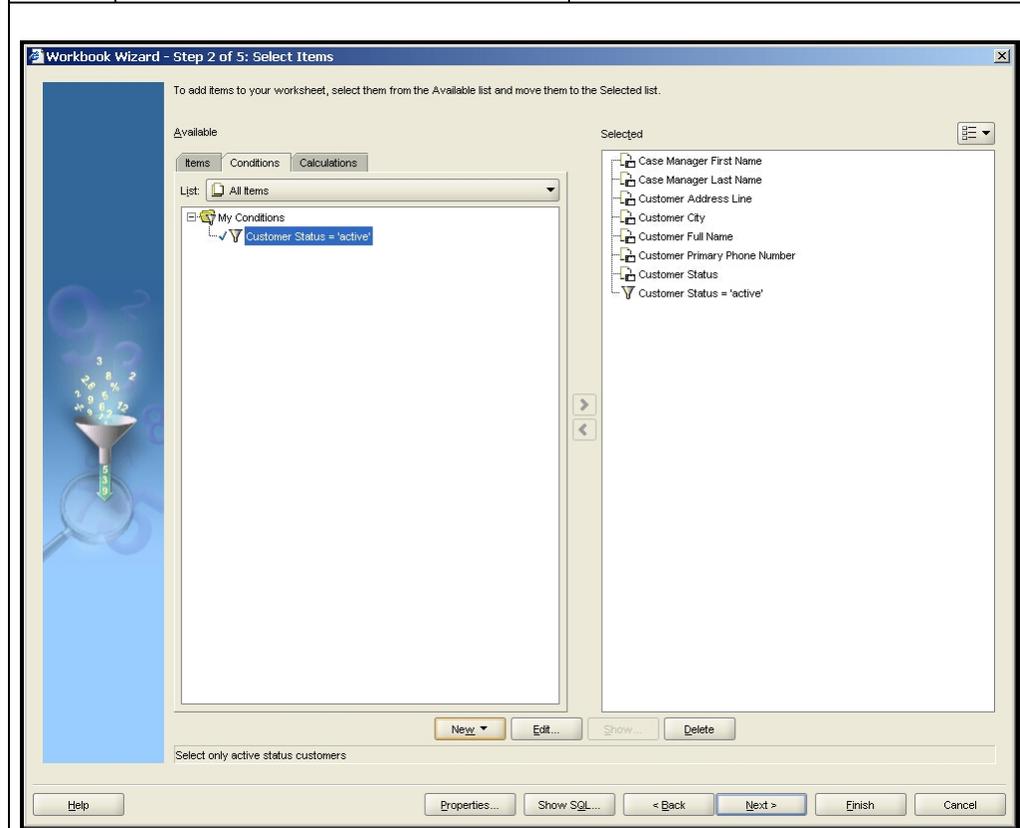
Item	Condition	Values
: Customer.Customer Status	=	'active'
- Case-sensitive checkbox: (circled in red)
- Footer: This condition is located in the workbook 'Workbook 3'.
- Buttons: Help, OK, Cancel

Continued on next page

Step 2: Select Items – Simple Conditions, Continued

Simple Condition How To (continued)

Step	Action	Result
10.	Click OK to save the details and close the dialog box.	The new condition appears in the Conditions wizard window and is turned on ready to be applied to the data.



11.	Click on the Calculations tab.	
-----	---------------------------------------	--

Step 2: Select Items – Advance Conditions

Introduction

Advance conditions are filters that contain several conditions combined to achieve the desired data selection.

Advance Condition How to

Follow the steps in the table below to create an advance condition.

Step	Action	Result
1.	Click on the Advanced >> button	Conditions dialog box will be expanded to include insert buttons for New Item, And and Or.

Continued on next page

Step 2: Select Items – Advance Conditions, Continued

Advance Condition How to (continued)

Step	Action	Result								
2.	Click the button appropriate button in the Insert area	Inserts a new condition statement line with the appropriate condition group.								
	<table border="1"> <thead> <tr> <th>Option</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>New Item button</td> <td>By default, the new item is grouped with a logical AND,</td> </tr> <tr> <td>And button</td> <td>Grouped with a logical AND. Data must match all condition statements contained within the AND group</td> </tr> <tr> <td>Or button</td> <td>Grouped with a logical OR</td> </tr> </tbody> </table>	Option	Action	New Item button	By default, the new item is grouped with a logical AND,	And button	Grouped with a logical AND. Data must match all condition statements contained within the AND group	Or button	Grouped with a logical OR	
Option	Action									
New Item button	By default, the new item is grouped with a logical AND,									
And button	Grouped with a logical AND. Data must match all condition statements contained within the AND group									
Or button	Grouped with a logical OR									

Continued on next page

Step 2: Select Items – Advance Conditions, Continued

Advance Condition How to (continued)

Step	Action	Result
3.	Select the Condition in the drop down listing	This will choose how to match the data against the item selected.
4.	Type the Value of the condition.	This is the information the condition will use for the filter.

What would you like to name your condition?

((Customer Status = 'active') AND (Customer Current County = 'LN')) Generate name automatically

What description would you like to give your condition?

Select only active status customers

Formula

Type text in single quotes or select a value from the drop-down list. Multiple values must be separated by commas. Click one of the Insert buttons to create new items or conditions. Shift-click to select multiple items, or drag items to reorder.

Group	Item	Condition	Values
: AND	Customer.Customer Status	=	'active'
	Customer.Customer Current County	=	'LN'

Case-sensitive ((Customer Status = 'active') AND (Customer Current County = 'LN'))

This condition is located in the workbook 'Workbook 1'.

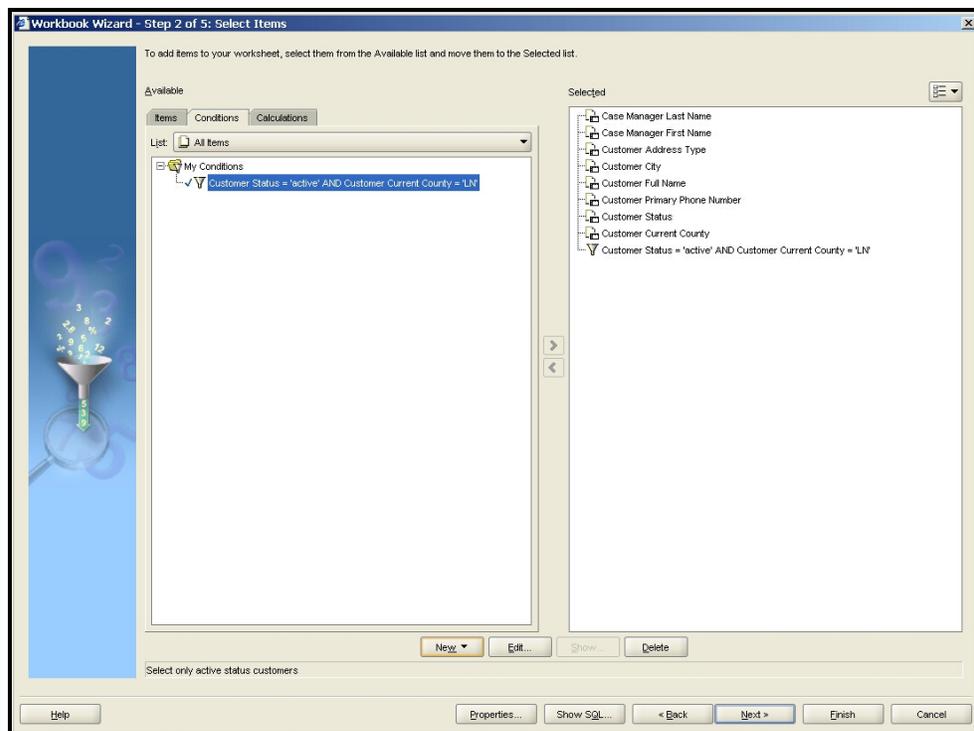
Help OK Cancel

Continued on next page

Step 2: Select Items – Advance Conditions, Continued

Advance Condition How to (continued)

Step	Action	Result
5.	A value can also be created by selecting items in the drop down list.	Conditions can be created by calculations, selecting another item to compare or creating a new or use an existing parameter.
6.	Case-Sensitive check box. <u>Recommended:</u> Uncheck this selection.	This check box will limit the results according to case.
7.	Click OK to save the details and close the dialog box.	The new condition appears in the Conditions wizard window and is turned on ready to be applied to the data.



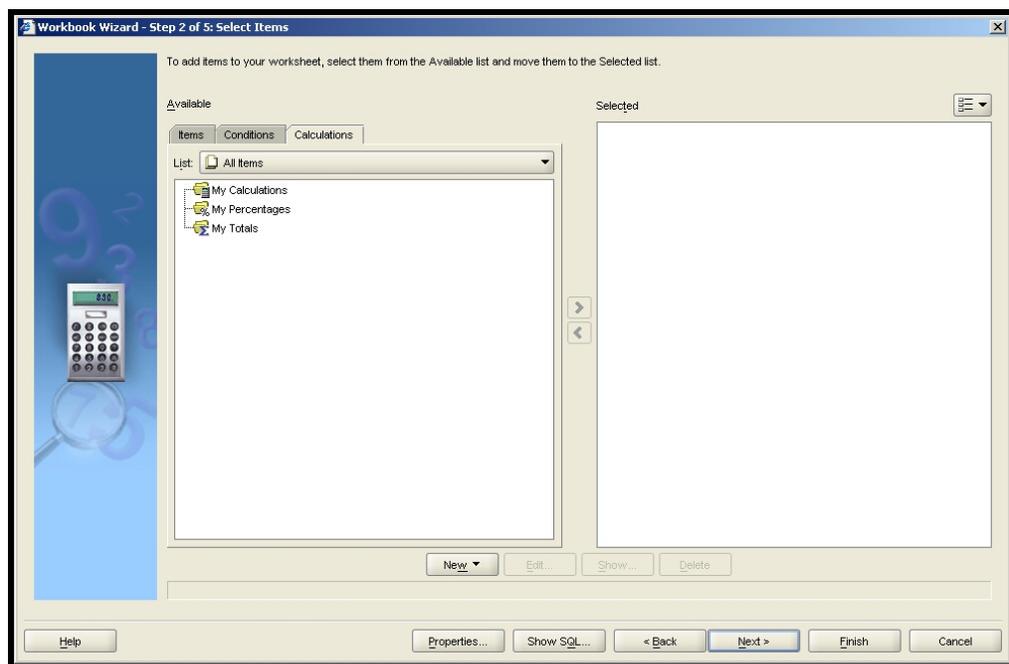
8.	Click on the Calculations tab.	
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Step 2: Select Items – Calculations

Introduction

This step of the wizard allows calculations, percentages and totals to be created on the worksheet. Calculations on items are based on expressions (e.g. mathematical formulas, or text handling functions).

Calculations are displayed as new columns on the worksheets. Totals are displayed as new rows on the worksheets.



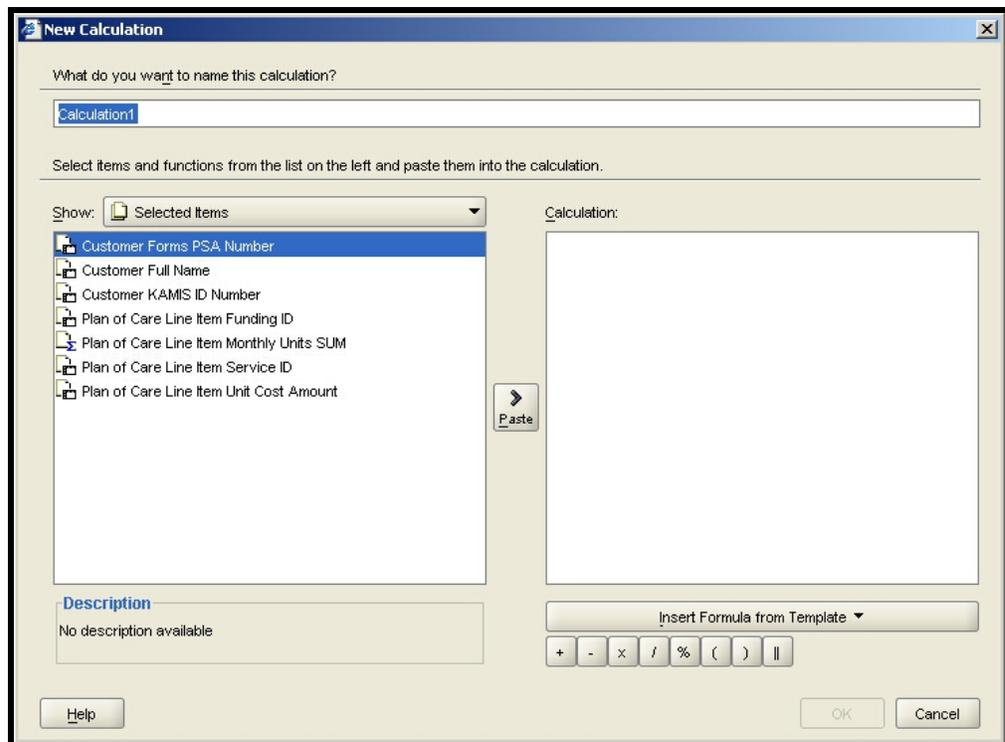
Continued on next page

Step 2: Select Items – Calculations, Continued

Introductions Calculations on items are based on expressions (e.g. mathematical formulas, or text handling functions). Calculations can be used in other calculations. The program provides a comprehensive range of pre-defined functions for use in worksheet calculations.

How to Follow the steps in the table below to create calculations for the data in the worksheet.

Step	Action	Result
1.	Click on the New Button.	Calculations option dialog box is displayed.
2.	Select Calculations	Calculation window is displayed



3.	What do you want to name this calculation?	Enter a descriptive name for the calculation item.
	NOTE: This field is displayed in calculation lists and on worksheets as the column header of the calculation results column. If the field is left blank, The program creates a default name for you.	

Continued on next page

Step 2: Select Items – Calculations, Continued

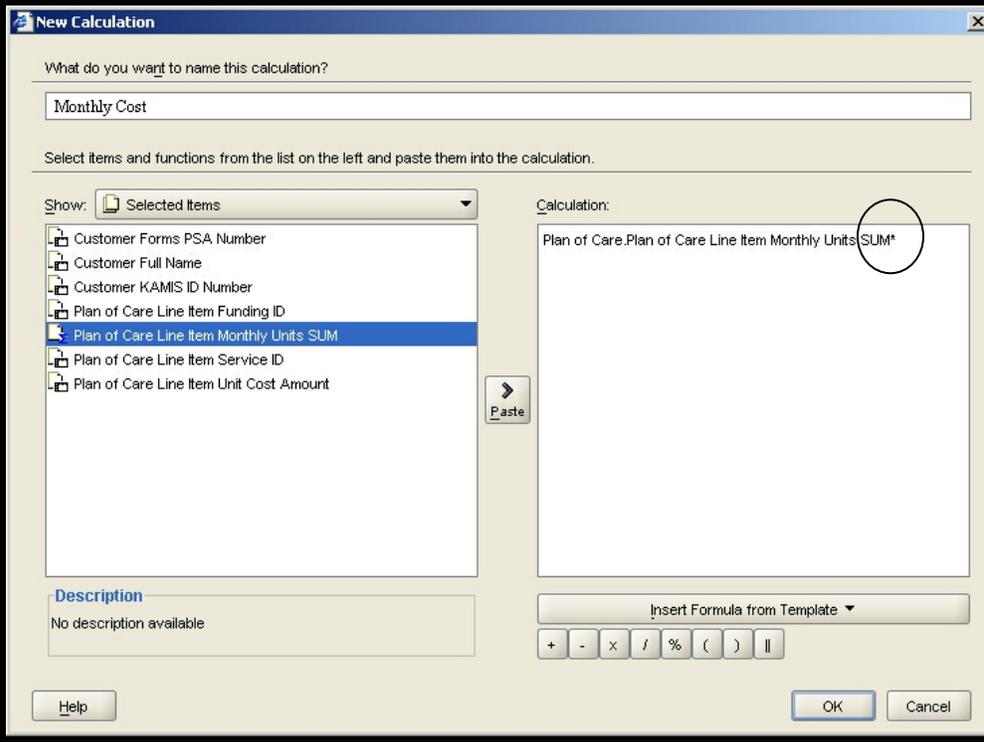
How to (continued)

Step	Action	Result
4.	Click on the first item that is to be used in the calculation.	Item is highlighted.
5.	Click on the Paste button.	Adds the item currently selected in the Show list into the Calculation area on the right hand side.

Continued on next page

Step 2: Select Items – Calculations, Continued

How to (continued)

Step	Action	Result
6.	Click the operator buttons underneath the Calculation box to use them in the calculation.	Operator is added in the Calculation area.
		
<p><u>NOTE:</u> When you use arithmetic expressions in a calculation, the mathematical standard is used.</p> <p>Formulas are calculated from left to right, but performs the calculations in the formula in the standard order:</p> <ul style="list-style-type: none"> • Items in Parentheses • Exponents • Multiplication and Division • Addition and Subtraction 		

Continued on next page

Step 2: Select Items – Calculations, Continued

How to (continued)

Step	Action	Result
7.	Complete the calculation.	The full formula will be displayed in the Calculation area.

What do you want to name this calculation?

Monthly Cost

Select items and functions from the list on the left and paste them into the calculation.

Show: Selected Items

- Customer Forms PSA Number
- Customer Full Name
- Customer KAMS ID Number
- Plan of Care Line Item Funding ID
- Plan of Care Line Item Monthly Units SUM
- Plan of Care Line Item Service ID
- Plan of Care Line Item Unit Cost Amount

Calculation:

Plan of Care.Plan of Care Line Item Monthly Units SUM*Plan of Care.Plan of Care Line Item Unit Cost Amount

Paste

Description

No description available

Insert Formula from Template

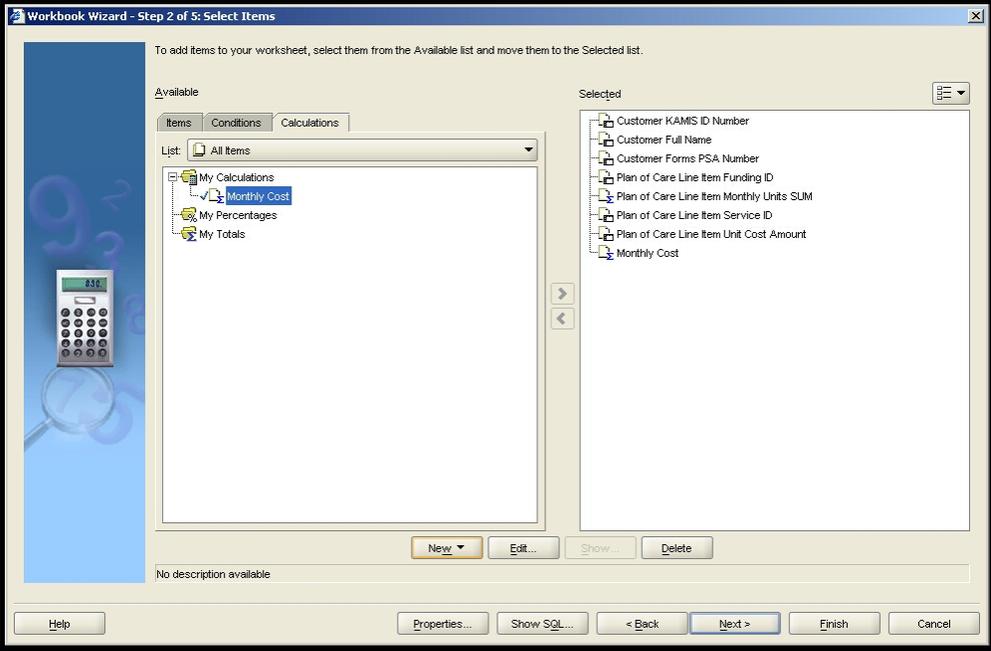
+ - x / % () ||

Help OK Cancel

Continued on next page

Step 2: Select Items – Calculations, Continued

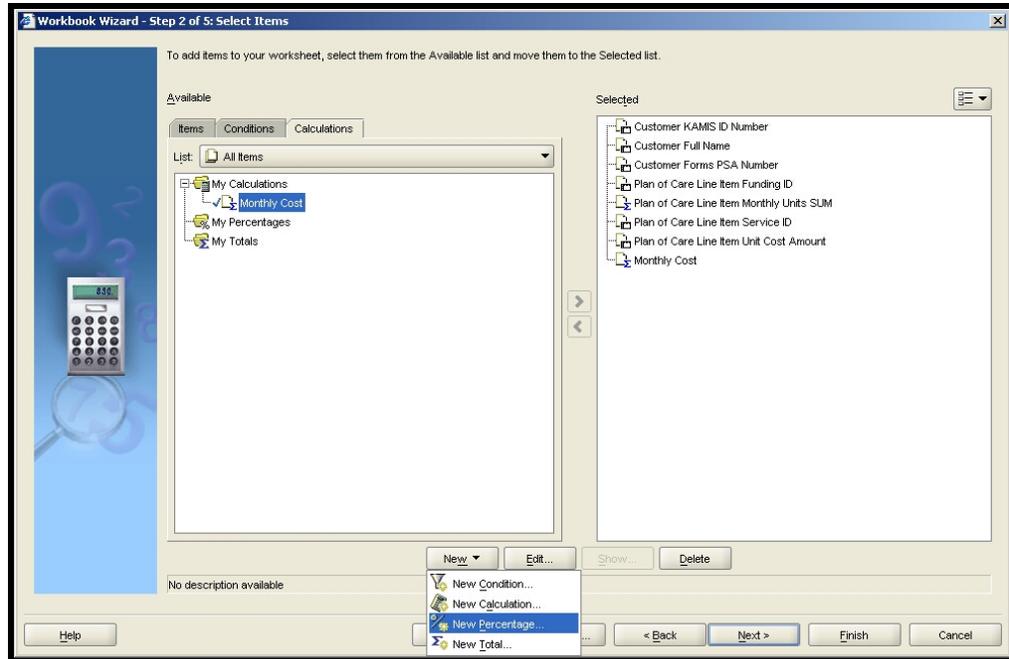
How to (continued)

Step	Action	Result
8.	Click the OK button	Will close the Calculation dialog box. The Workbook Wizard window will be displayed displaying the calculation
 <p>The screenshot shows the 'Workbook Wizard - Step 2 of 5: Select Items' dialog box. It has a title bar and a close button. The main area is divided into 'Available' and 'Selected' sections. The 'Available' section has tabs for 'Items', 'Conditions', and 'Calculations'. Under 'Items', there is a list with 'My Calculations' expanded, showing 'Monthly Cost' selected. The 'Selected' section on the right shows a list of items including 'Customer KAMIS ID Number', 'Customer Full Name', 'Customer Forms PSA Number', 'Plan of Care Line Item Funding ID', 'Plan of Care Line Item Monthly Units SUM', 'Plan of Care Line Item Service ID', 'Plan of Care Line Item Unit Cost Amount', and 'Monthly Cost'. At the bottom, there are buttons for 'New', 'Edit...', 'Show...', and 'Delete'. Below these are 'Help', 'Properties...', 'Show SQL...', '< Back', 'Next >', 'Finish', and 'Cancel' buttons. The 'Next >' button is highlighted in blue.</p>		
9.	Continue to create a percentage or totals on the data.	See next section for instructions.
10.	If neither option is desired, Click on the Next button	Workbook Wizard will advance to Step 3.

Step 2: Select Items - Percentage

Introduction

This step of the wizard contains the option to add Percentage values in the results window of a worksheet.



Continued on next page

Step 2: Select Items - Percentage, Continued

How to

Follow the steps in the table below to sort the data in the worksheet.

Step	Action	Result
1.	Click New button and select Percentage .	Displays the New Percentage dialog box.
2.	What do you want to name this percentage?	If a different name is desired than the default name of the new percentage, enter the name in the field.

What do you want to name this percentage?

Percent Monthly Cost

Generate name automatically

Which data point do you want to base your percentage on?

Plan of Care Line Item Monthly Cost Amount SUM

Calculate as a percentage of:

Grand total of all values

Subtotal at each change in:

Plan of Care Line Item Service ID

Do you want to calculate percentages within each page?

Calculate percentages within each page

Calculate percentages across all pages

Example

	M1	M2	n	%	
1	AA	aa1	30	30%	
2		aa2	20	20%	%
3				50%	30%
4	BB	bb1	30	30%	20%
5		bb2	20	20%	50%
6				50%	30%
5		bb2	20	20%	
6				50%	

The example above shows a percentage calculated from sample data with both totals shown.

Which totals do you want to be shown?

Show subtotal and subtotal percentage

Label: Percent

Show the percentage of the grand total for each subtotal

Label: Percent Grand

Help OK Cancel

Continued on next page

Step 2: Select Items - Percentage, Continued

How to (continued)

Step	Action	Result
3.	Which data point do you want to base your percentage on?	The drop down list displays numeric items currently displayed on the worksheet.

New Percentage

What do you want to name this percentage?

 Generate name automatically

Which data point do you want to base your percentage on?
 Monthly Cost
 Monthly Cost
 Plan of Care Line Item Monthly Units SUM
 Grand total of all values
 Subtotal at each change in:

Do you want to calculate percentages within each page?
 Calculate percentages within each page
 Calculate percentages across all pages

Which totals do you want to be shown?
 Show grand total and grand total percentage
 Label:

Example

	M1	M2	n	%
1	AA	aa1	30	30%
2		aa2	20	20%
3	BB	bb1	30	30%
4		bb2	20	20%
5				100%

The example above shows a percentage calculated from sample data with both totals shown.

Continued on next page

Step 2: Select Items - Percentage, Continued

How to (continued)

Step	Action	Result						
4.	Calculate as a percentage of	Use the radio buttons to choose where to display the percentage, as follows:						
	<table border="1"> <thead> <tr> <th>Radio Button</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Grand Total of all values</td> <td>Calculates the values as a percentage of the whole column.</td> </tr> <tr> <td>Subtotal at each change in</td> <td>Choose the item on which to group the data from the drop down list.</td> </tr> </tbody> </table>	Radio Button	Action	Grand Total of all values	Calculates the values as a percentage of the whole column.	Subtotal at each change in	Choose the item on which to group the data from the drop down list.	
Radio Button	Action							
Grand Total of all values	Calculates the values as a percentage of the whole column.							
Subtotal at each change in	Choose the item on which to group the data from the drop down list.							

What do you want to name this percentage?

Item Monthly Units SUM, Customer KAMIS ID Number

Generate name automatically

Which data point do you want to base your percentage on?

Plan of Care Line Item Monthly Units SUM

Calculate as a percentage of:

Grand total of all values

Subtotal at each change in:

Customer Forms PSA Number

Do you want to show the percentage of the grand total for each subtotal?

Show the percentage of the grand total for each subtotal

Label: Percent Grand

Example

	M1	M2	n	%
1	AA	aa1	30	60%
2		aa2	20	40%
3				100%
4	BB	bb1	30	60%
5		bb2	20	40%
6				100%

The example above shows a percentage calculated from sample data with both totals shown.

Which totals do you want to be shown?

Show subtotal and subtotal percentage

Label: Percent

Format Heading...

Format Data...

Format Data...

OK Cancel

Continued on next page

Step 2: Select Items - Percentage, Continued

How to (continued)

Step	Action	Result
5.	Which page items do you want to include?	Calculate percentages for the currently displayed page item or all page items on the worksheet.
6.	Which totals do you want to be shown?	Use the check boxes to specify how you display grand totals and subtotals. The options available are dependent upon the radio button selected in the “Calculate as a percentage” of section.

Edit Percentage

What do you want to name this percentage?

 Generate name automatically

Which data point do you want to base your percentage on?

Calculate as a percentage of:
 Grand total of all values
 Subtotal at each change in:

Do you want to calculate percentages within each page?
 Calculate percentages within each page
 Calculate percentages across all pages

Which totals do you want to be shown?
 Show subtotal and subtotal percentage
 Label:
 Show the percentage of the grand total for each subtotal
 Label:

Example

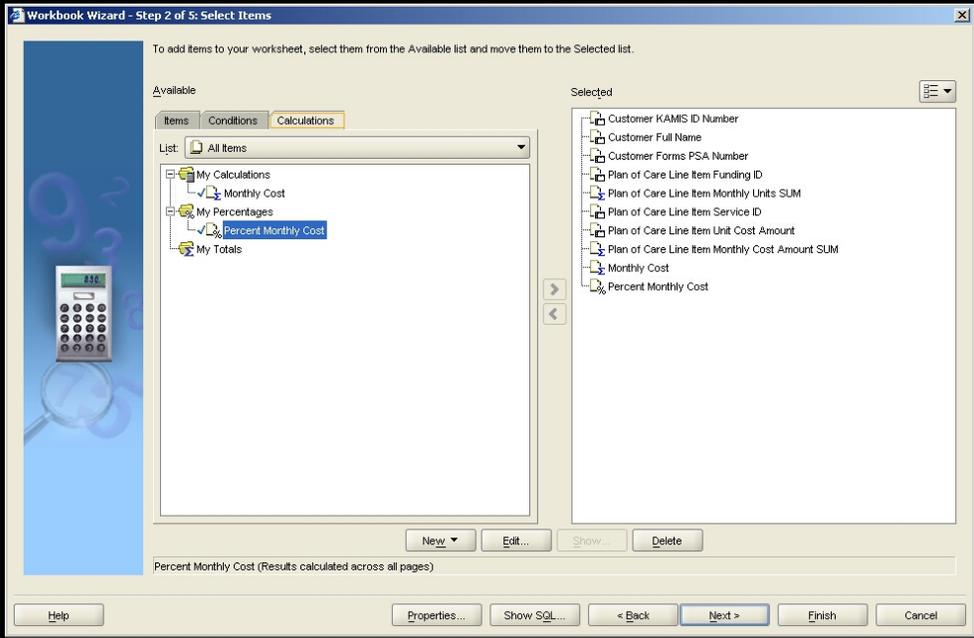
	M1	M2	n	%	
1	AA	aa1	30	30%	
2		aa2	20	20%	%
3				50%	30%
4	BB	bb1	30	30%	20%
5		bb2	20	20%	50%
6				50%	30%
	5		bb2	20	20%
	6				50%

The example above shows a percentage calculated from sample data with both totals shown.

Continued on next page

Step 2: Select Items - Percentage, Continued

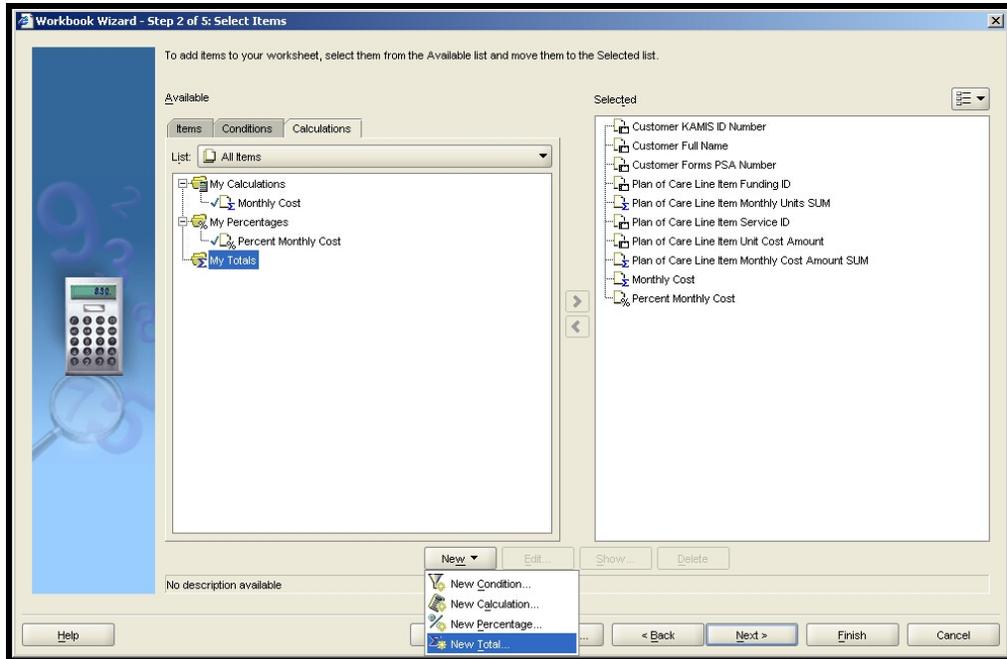
How to (continued)

Step	Action	Result
7.	Click OK	Will close the Percentages dialog box. The Workbook Wizard window will be displayed indicating the percentage name and the option is turned on ready to be applied to the data.
		
8.	Continue to create a percentage or totals on the data.	See next section for instructions.
9.	If neither option is desired, Click on the Next button	Workbook Wizard will advance to Step 3.

Step 2: Select Items - Totals

Introduction

This step of the wizard contains the option to add Total values in the results window of a worksheet.



Continued on next page

Step 2: Select Items - Totals, Continued

How to

Follow the steps in the table below to display totals to the data in the worksheet.

Step	Action	Result
1.	Click New button and select Total .	Displays the New Total dialog box.

Continued on next page

Step 2: Select Items - Totals, Continued

How to (continued)

Step	Action	Result
2.	Which data point would you like to create a total on?	Select the item to summarize from the drop down list.
<p><u>NOTE:</u> By selecting All Data Points from the drop-down list totals for all numeric items on the worksheet will be created.</p>		

Continued on next page

Step 2: Select Items - Totals, Continued

How to (continued)

Step	Action	Result
3.	What kind of total do you want?	Select a Total type from the drop down list. For example, choose Sum to add the values, or choose Average to calculate a mean.

New Total

Which item would you like to create a total on?
 Customer Full Name

What kind of total do you want?
 Count
 Count Distinct
 Minimum
 Maximum

Subtotal at each change in:
 Subtotal at each change in:
 All Group Sorted Items

Don't display total for a single row

Do you want to calculate totals within each page?
 Calculate totals within each page.
 Calculate totals across all pages.

What label do you want to be shown?
 Count
 Generate label automatically

Format Heading...
 Format Data...

Help OK Cancel

Example

	M1	M2	n1	n2
1	AA	aa1	10	10
2		aa2	10	10
3	BB	bb1	10	10
4		bb2	10	10
5				40

The example above shows a Sum total calculated from sample data.

Continued on next page

Step 2: Select Items - Totals, Continued

How to (continued)

Step	Action	Result								
4.	Where would you like your total to be shown?									
	<table border="1"> <thead> <tr> <th>Radio Button</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Grand total at bottom</td> <td>Calculate a grand total for a column and place it after the last row of the table.</td> </tr> <tr> <td>Subtotal at each change in</td> <td>Select the item on which to group the data from the drop down list.</td> </tr> <tr> <td>Don't display total for a single row</td> <td></td> </tr> </tbody> </table>	Radio Button	Action	Grand total at bottom	Calculate a grand total for a column and place it after the last row of the table.	Subtotal at each change in	Select the item on which to group the data from the drop down list.	Don't display total for a single row		
Radio Button	Action									
Grand total at bottom	Calculate a grand total for a column and place it after the last row of the table.									
Subtotal at each change in	Select the item on which to group the data from the drop down list.									
Don't display total for a single row										

Continued on next page

Step 2: Select Items - Totals, Continued

How to (continued)

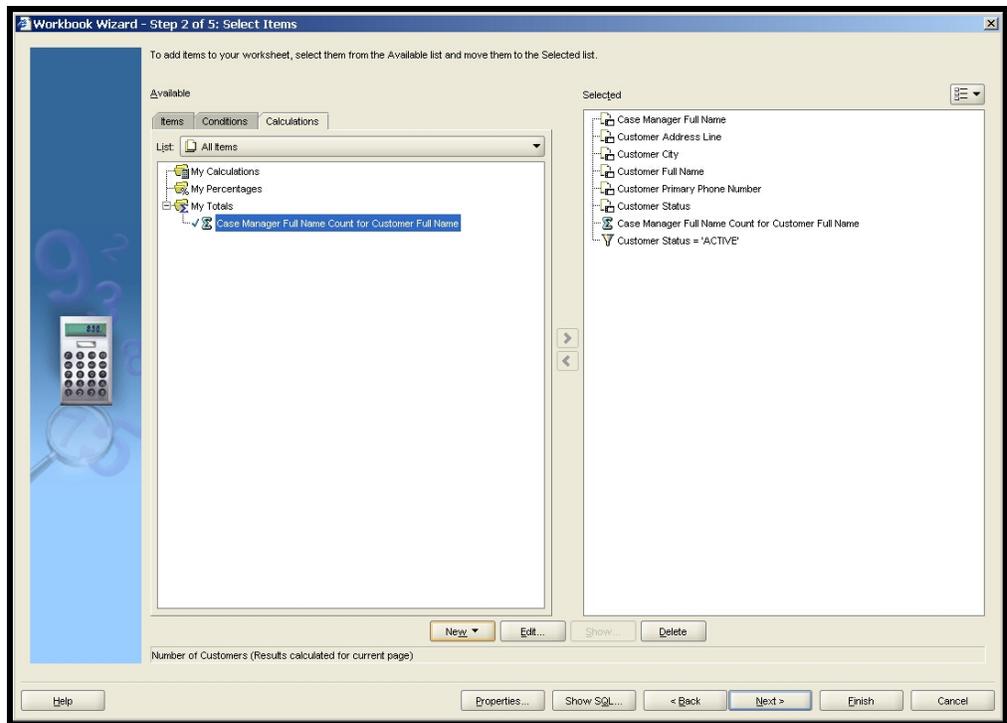
Step	Action	Result								
5.	Positioning options are different depending on the type of worksheet.									
	<table border="1"> <thead> <tr> <th>Worksheet Type</th> <th>Position Option</th> </tr> </thead> <tbody> <tr> <td>Table</td> <td>Bottom of the worksheet</td> </tr> <tr> <td>Crosstab</td> <td>Bottom of the worksheet Right of a worksheet</td> </tr> </tbody> </table>		Worksheet Type	Position Option	Table	Bottom of the worksheet	Crosstab	Bottom of the worksheet Right of a worksheet		
Worksheet Type	Position Option									
Table	Bottom of the worksheet									
Crosstab	Bottom of the worksheet Right of a worksheet									
6.	Which page items do you want to include?	Choose whether to summarize data for the currently displayed page item or all page items on the worksheet.								
	NOTE: The options are grayed out when no page items are available on the worksheet.									
7.	What label do you want to be shown?,									
	<table border="1"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Generate label automatically?</td> <td>Check box if you want The program to generate a label for you.</td> </tr> <tr> <td>use the drop down list to insert variable values</td> <td></td> </tr> <tr> <td>type in a label for the total</td> <td></td> </tr> </tbody> </table>		Option	Description	Generate label automatically?	Check box if you want The program to generate a label for you.	use the drop down list to insert variable values		type in a label for the total	
Option	Description									
Generate label automatically?	Check box if you want The program to generate a label for you.									
use the drop down list to insert variable values										
type in a label for the total										

Continued on next page

Step 2: Select Items - Totals, Continued

How to (continued)

Step	Action	Result
8.	Click OK	Will close the Totals dialog box. The Workbook Wizard window will be displayed indicating the percentage name and the option is turned on ready to be applied to the data.



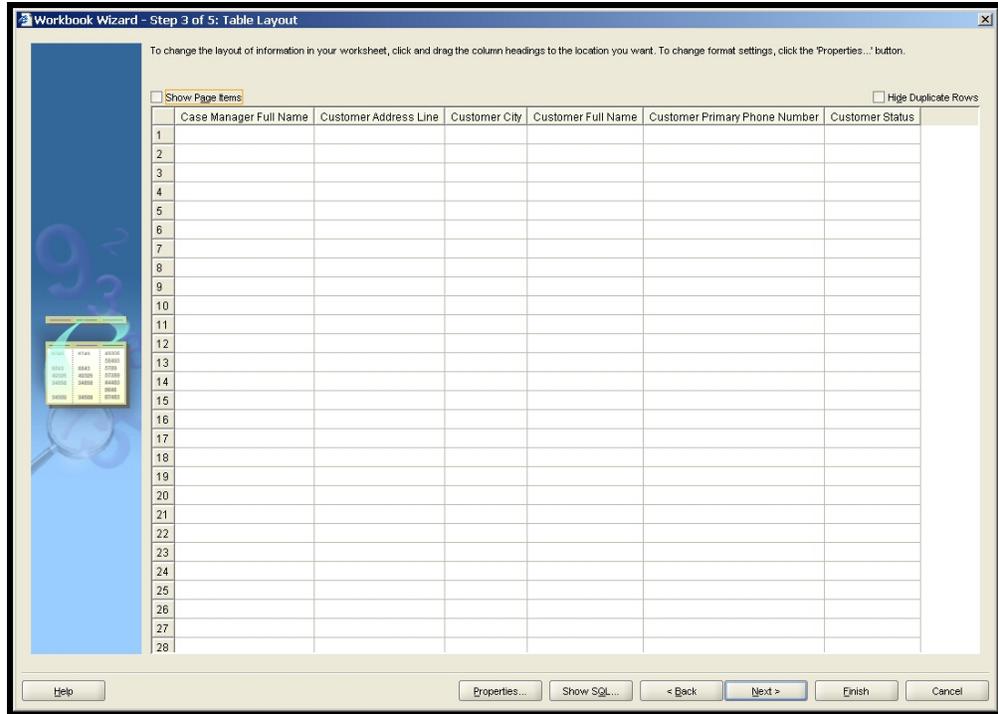
9.	Click on the Next button	Workbook Wizard will advance to Step 3.
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Step 3: Table Layout Options

Introduction

After you have selected the items to be included in a query, you can order the column and row axis items, or enable or disable the page-detail layout.

Default View



Hide Duplicate Rows

Use this feature when the query retrieves duplicated rows. The duplicated rows will not be seen in the results window.

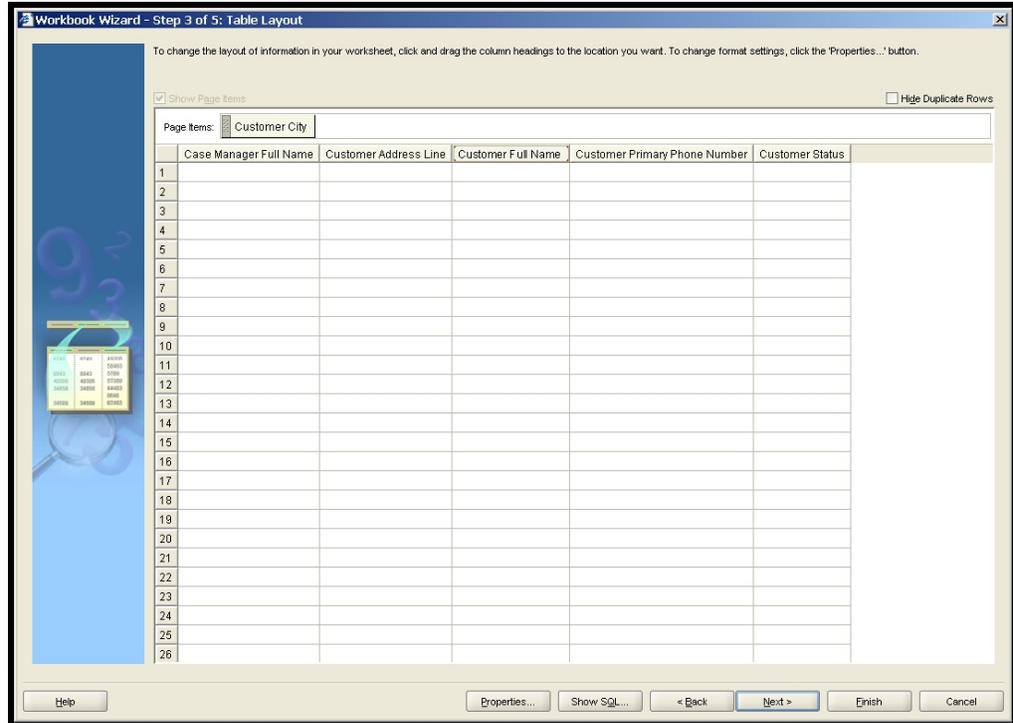
Continued on next page

Step 3: Table Layout Options, Continued

Show Page Items Option

A page-detail layout is a table for each value of the page item, such as a page per assessor or service. The values of the page item appear outside the main body of the layout and can be toggled to change the value which produces a different result window.

Show Page Items View



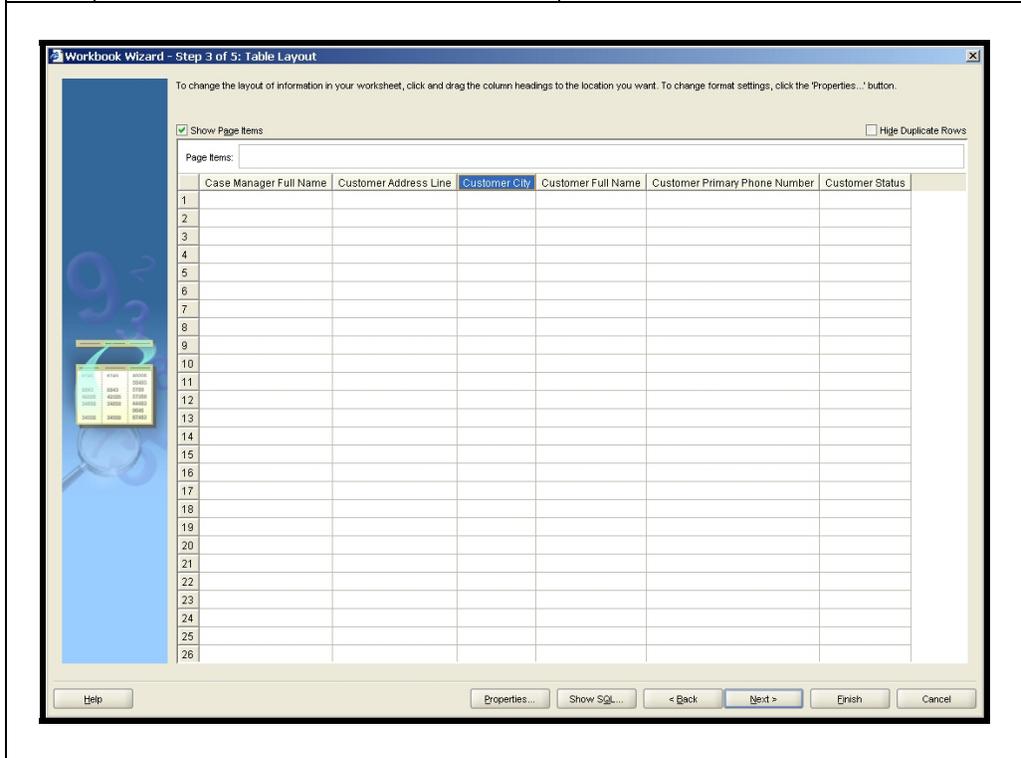
Continued on next page

Step 3: Table Layout Options, Continued

How To

Follow the steps in the table below to select the Page Item value.

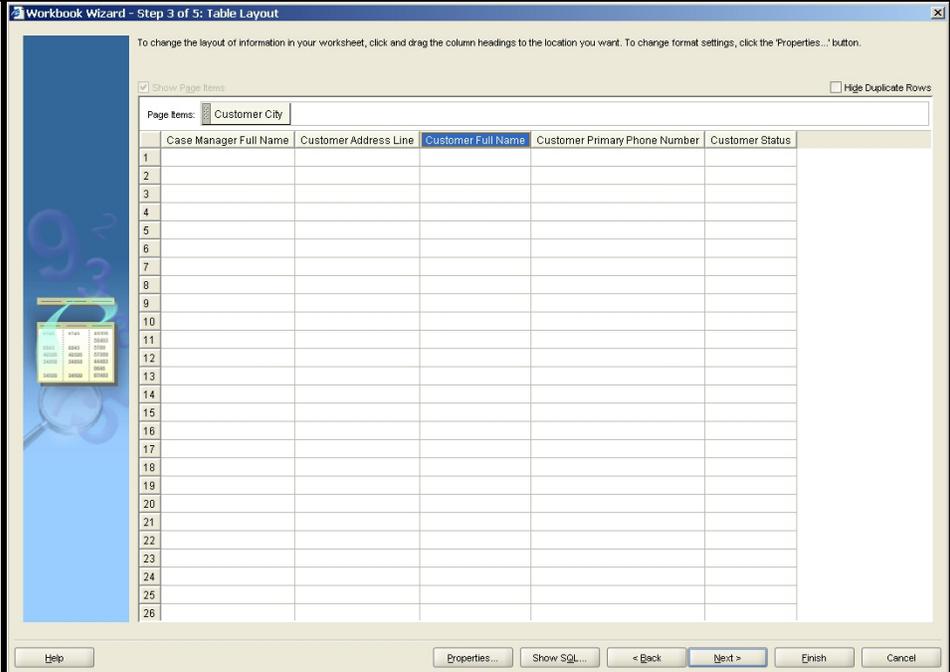
Step	Action	Result
1.	Click on the column heading to be moved to the Page Item area.	Column heading will be highlighted.
2.	Click and while holding the mouse button down, drag the column up to the Page Item area.	Dark line will indicate where the column will be moved.



Continued on next page

Step 3: Table Layout Options, Continued

How To (continued)

Step	Action	Result						
3.	Release mouse button	Column will be moved.						
								
4.	Remaining columns	Follow the table below for the correct situation.						
<table border="1"> <thead> <tr> <th>Situation</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Needs Re-Ordered</td> <td>Follow the instructions in the next section.</td> </tr> <tr> <td>Does not need to be Re-Ordered</td> <td>Click on the Next button. Workbook Wizard will advance to Step 4.</td> </tr> </tbody> </table>			Situation	Action	Needs Re-Ordered	Follow the instructions in the next section.	Does not need to be Re-Ordered	Click on the Next button. Workbook Wizard will advance to Step 4.
Situation	Action							
Needs Re-Ordered	Follow the instructions in the next section.							
Does not need to be Re-Ordered	Click on the Next button. Workbook Wizard will advance to Step 4.							

Step 3: Table Layout Options, Continued

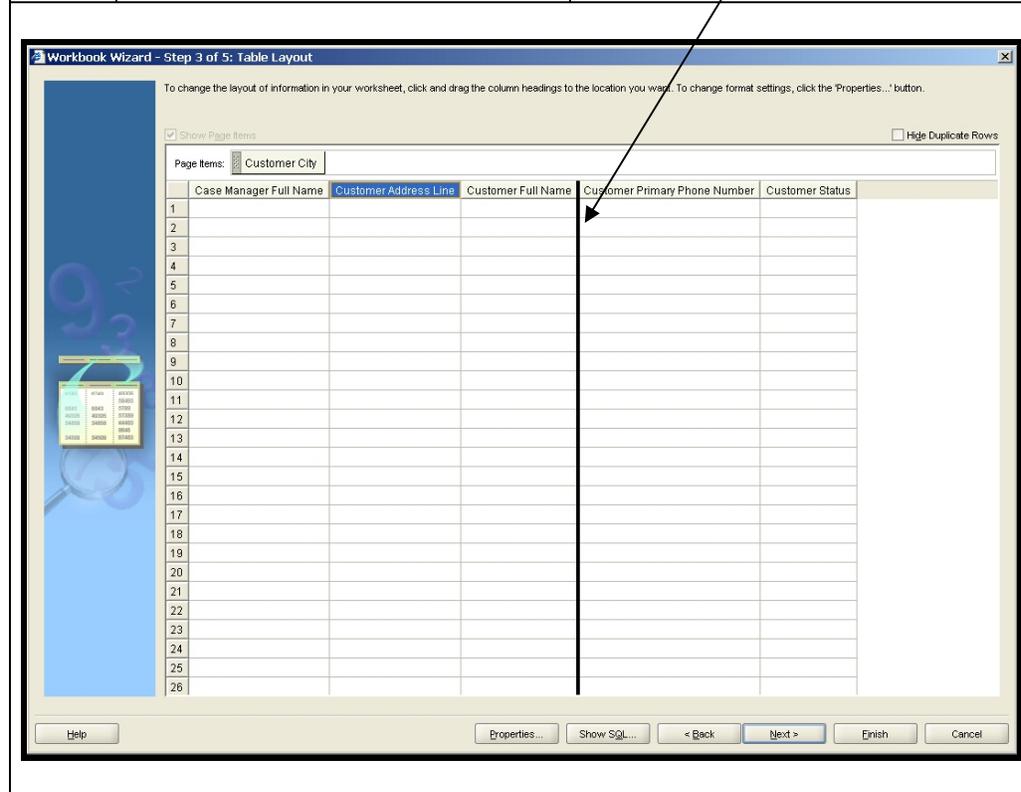
Introduction

To move or re-order the columns of data can be done in either the Table or the Page Item view.

How To

Follow the steps in the table below to re-order the column items.

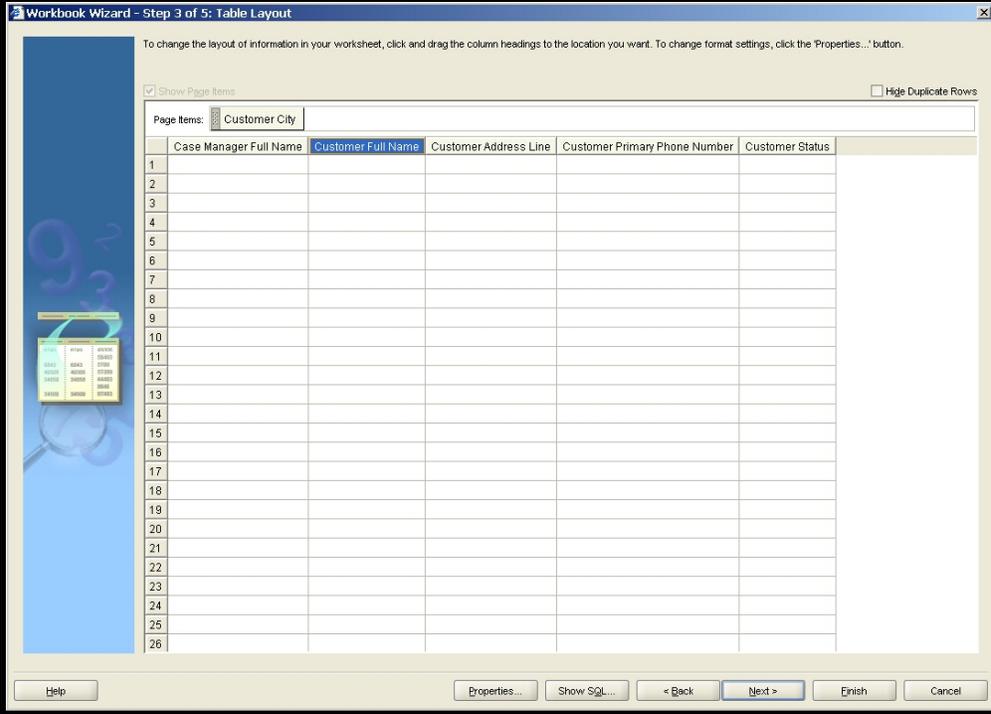
Step	Action	Result
1.	Click on the column heading to be moved.	Column heading will be highlighted.
2.	Click and while holding the mouse button down, drag the column to the desired location.	Dark line will indicate where the column will be moved.



Continued on next page

Step 3: Table Layout Options, Continued

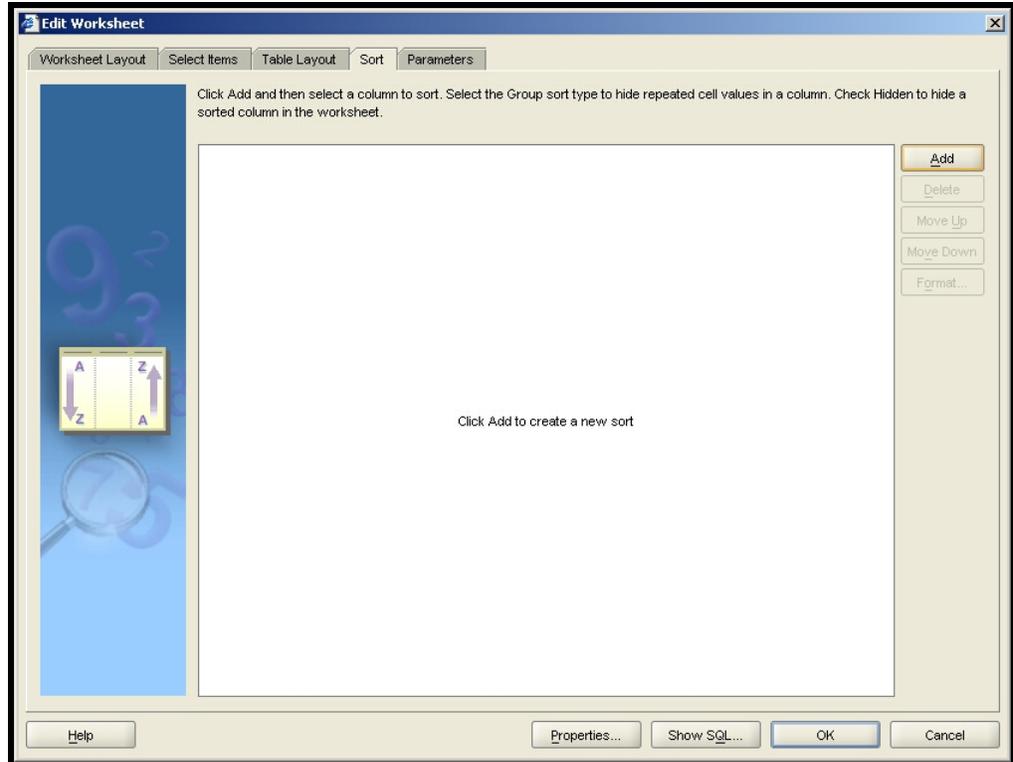
How To (continued)

Step	Action	Result
3.	Release mouse button	Column will be moved.
		
4.	Click on the Next button	Workbook Wizard will advance to Step 4.

Step 4: Sort

Introduction

This step of the wizard contains the option to change the default sort order of items on the results window of a worksheet.



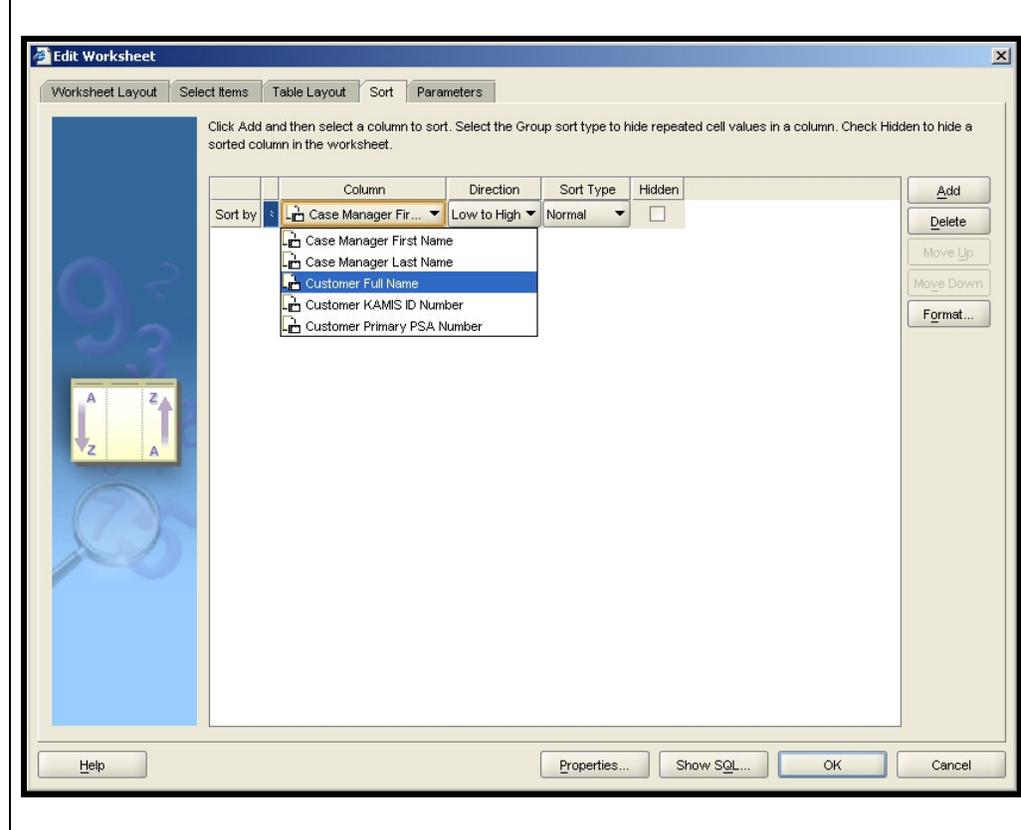
Continued on next page

Step 4: Sort, Continued

How To

Follow the steps in the table below to sort the data in the worksheet.

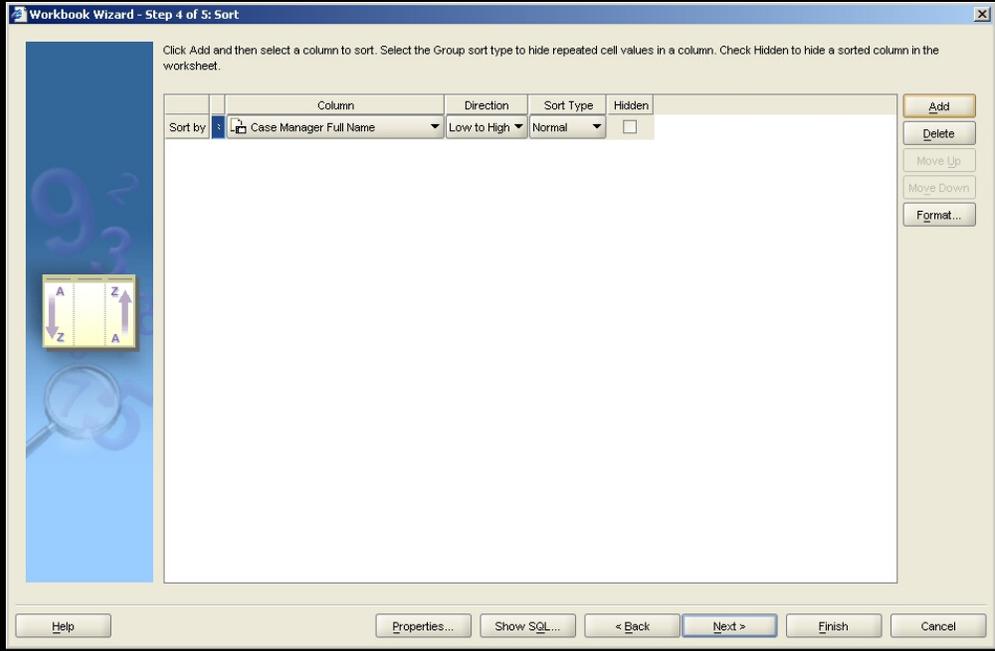
Step	Action	Result
1.	Click on the Add button	All items that have been selected for the query are displayed.



Continued on next page

Step 4: Sort, Continued

How To (continued)

Step	Action	Result
2.	Click the item as appropriate	The sort line will be added
		
3.	Click on the Next button	Workbook Wizard will advance to Step 7

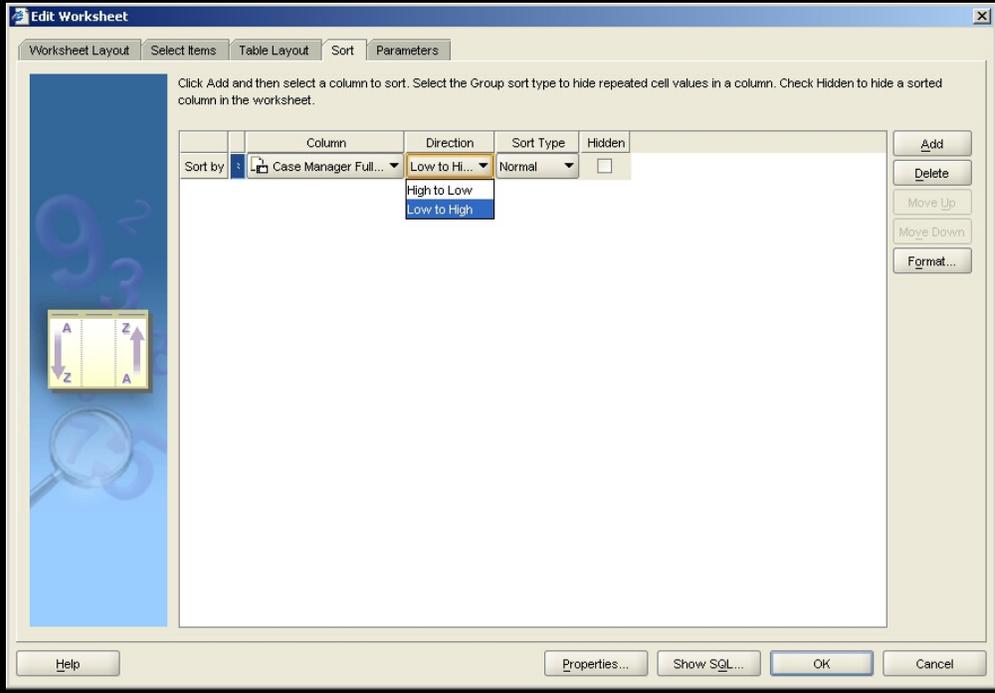
Other Options Follow the steps in the below sections to customize the data sort process.

Continued on next page

Step 4: Sort, Continued

Direction Sort Options

This option will change how the data is ordered.

Step	Action	Result						
1.	Select the Direction of the sort							
								
<table border="1"> <thead> <tr> <th>Direction</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>High to Low</td> <td>Z to A alphabetically or 10 to 1 numerically</td> </tr> <tr> <td>Low to High</td> <td>A to Z alphabetically or 1 to 10 numerically</td> </tr> </tbody> </table>			Direction	Description	High to Low	Z to A alphabetically or 10 to 1 numerically	Low to High	A to Z alphabetically or 1 to 10 numerically
Direction	Description							
High to Low	Z to A alphabetically or 10 to 1 numerically							
Low to High	A to Z alphabetically or 1 to 10 numerically							

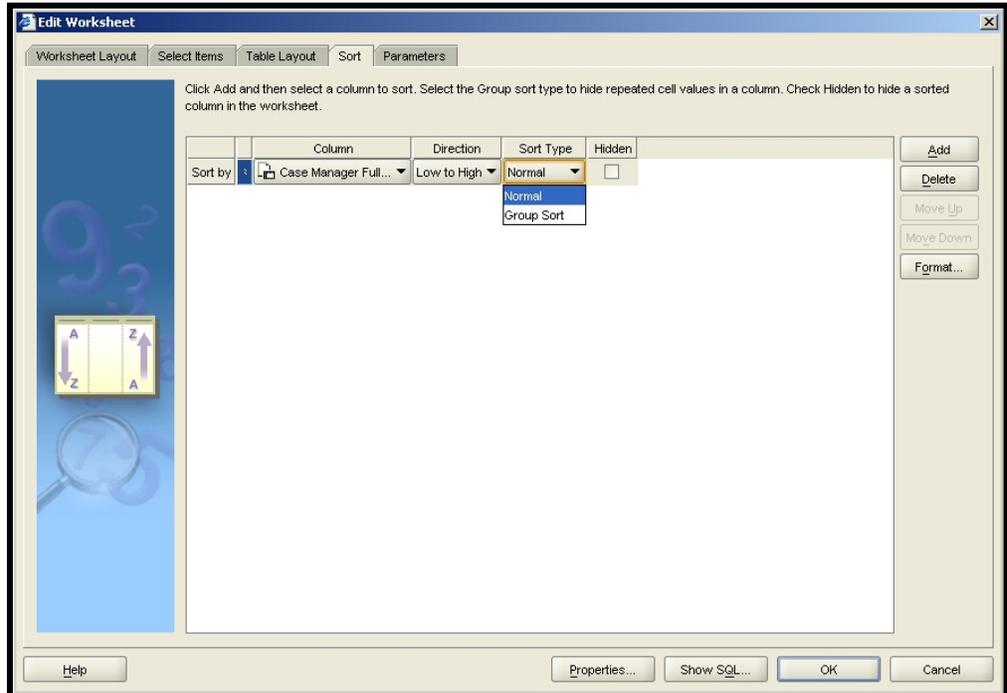
Continued on next page

Step 4: Sort, Continued

Group Sort Option

This option will group data into categories.

Step	Action	Result
1.	Select if the data should be Group	



Group Option	Description
None	No Grouping
Group Sort	Groups will be created using the item selected.

Continued on next page

Step 4: Sort, Continued

Group Sort Notes:

- The Group Sort will not display duplicate values in the listing:
A sort on the Year, there will be many rows for the year 2003 but the value “2003” will only be displayed once on the first row with that value.
- Items sorted on group take precedence over items not sorted on group.
- Change an item to group sort automatically moves it to a higher position in the sort list over items not sorted on group.

Hidden Sort Option

This option will sort on the data but the column will not be displayed on the worksheet.

Step	Action	Result
1.	If the Column and data should be hidden – Click on the Check Box .	Select if the data should be Hidden

Sort Order Maintenance

These options will delete a sort item or allow the change of the sort order for the data.



Option	Result
Add button	Will add a sort item to the sort list
Delete button	Will remove the sort item selected from the sort list
Move Up button	Will change the order of precedence of the selected item. Moving the sort up the list increases it precedence
Move Down button	Will change the order of precedence of the selected item. Moving the sort down the list decreases it precedence
Format button	Will change the formatting of the data. See the following section for more instructions.

Step 4: Sort – Format Option

Introduction

This option allows the formatting defaults to be changed. The formatting effects how the data of the results are displayed. For example:

- Select the font.
- Select the font size.
- Select the font style.
- Format the background or font colors
- Text alignment
- Word wrap

How To Format Data

Follow the steps in the table below to format the Data section of the Results window.

Step	Action	Result
1.	Click on the Format button	Format dialog box will be displayed.
2.	The following format options are available.	

Font Type and Size

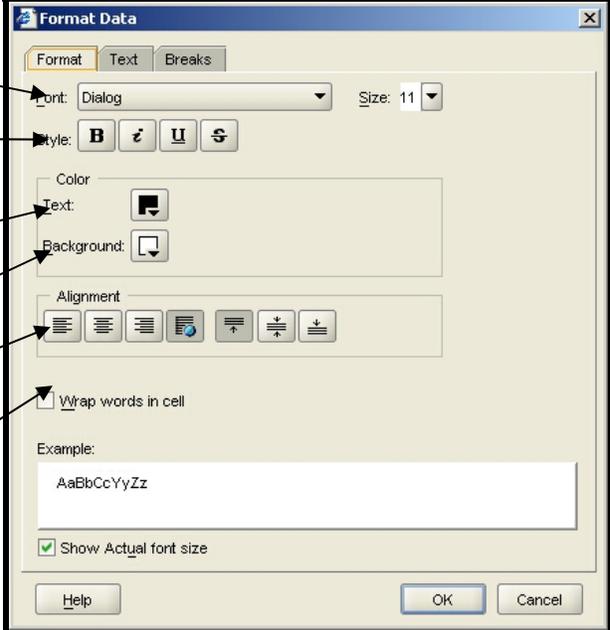
Font Style
Bold, Italics, Underline,
Strike-through

Text Color

Background Color

Text Alignment
Horizontally
Vertically

Word Wrap



The screenshot shows the 'Format Data' dialog box with the following elements labeled by arrows:

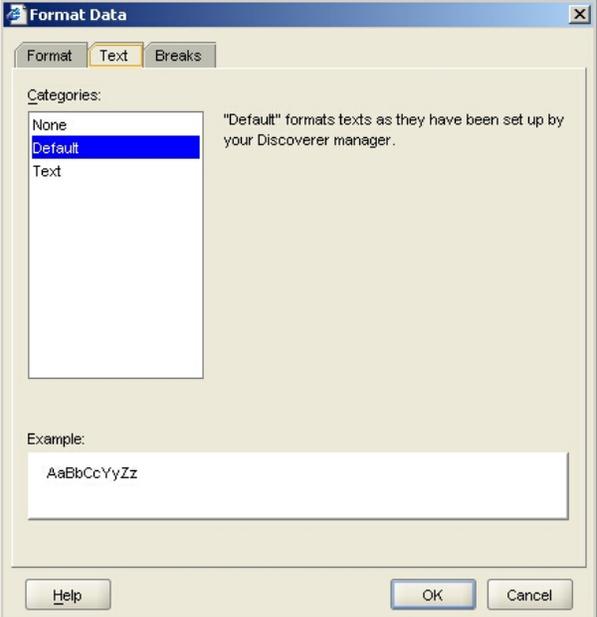
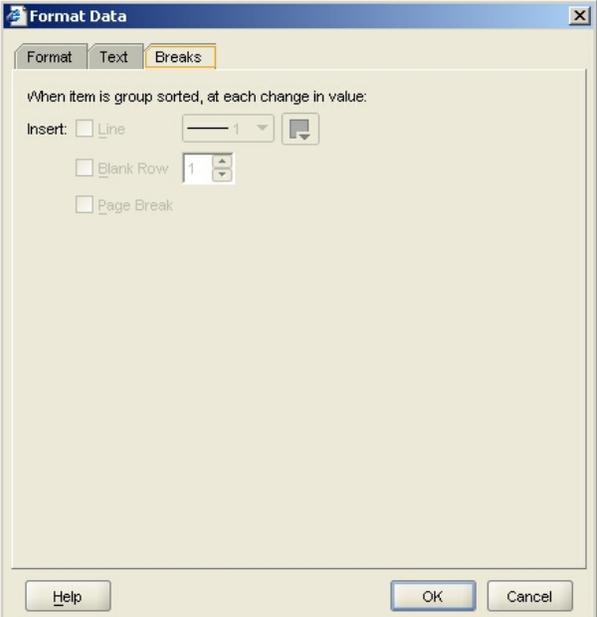
- Font Type and Size:** Points to the 'Font' dropdown menu (set to 'Dialog') and the 'Size' dropdown menu (set to '11').
- Font Style:** Points to the 'Style' section containing buttons for Bold (B), Italic (I), Underline (U), and Strike-through (ABC).
- Text Color:** Points to the 'Color' section, specifically the 'Text' color selection area.
- Background Color:** Points to the 'Background' color selection area.
- Text Alignment:** Points to the 'Alignment' section, which includes icons for left, center, right, and justified alignment, as well as vertical alignment options (top, middle, bottom).
- Word Wrap:** Points to the 'Wrap words in cell' checkbox, which is currently unchecked.

At the bottom of the dialog, there is an 'Example' text box containing 'AaBbCcYyZz', a 'Show Actual font size' checkbox (checked), and 'Help', 'OK', and 'Cancel' buttons.

Continued on next page

Step 4: Sort – Format Option, Continued

How To Format Data (continued)

Step	Action	Result
3.	Change format options as desired.	
4.	These options are unavailable at this time.	 <p>The screenshot shows the 'Format Data' dialog box with the 'Text' tab selected. Under 'Categories', 'Default' is highlighted. The 'Example' field displays 'AaBbCcYyZz'. The 'Breaks' tab is also visible but not selected.</p>
5.	These options are unavailable at this time.	 <p>The screenshot shows the 'Format Data' dialog box with the 'Breaks' tab selected. Under 'When item is group sorted, at each change in value:', the 'Insert: Line' option is selected with a value of 1. 'Blank Row' and 'Page Break' are unselected.</p>
6.	Click on the OK button.	Dialog box will close.

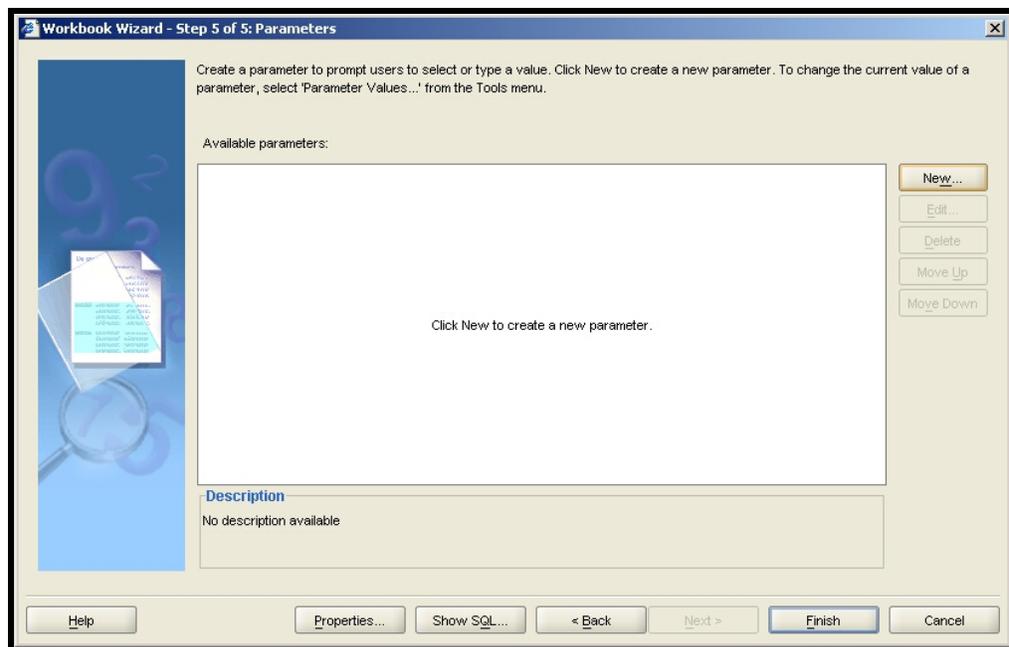
Step 5: Parameters

Introduction

This step of the wizard contains the option to add input Parameters for a workbook or worksheet.

Input values are typically used to:

- Provide input to conditions that are used to filter worksheets:
Example: When a workbook or worksheet is opened or refreshed, a parameter is used to first ask the worksheet user “What Case Manager/Assessor do you want to select?”
 - Provide input to calculations:
Example: A parameter is used to first ask the worksheet user to enter a value to be used in the calculation.
-



Continued on next page

Step 5: Parameters, Continued

How to

Follow the steps in the table below to display totals to the data in the worksheet.

Step	Action	Result
1.	Click New button.	Displays the New Parameter dialog box.

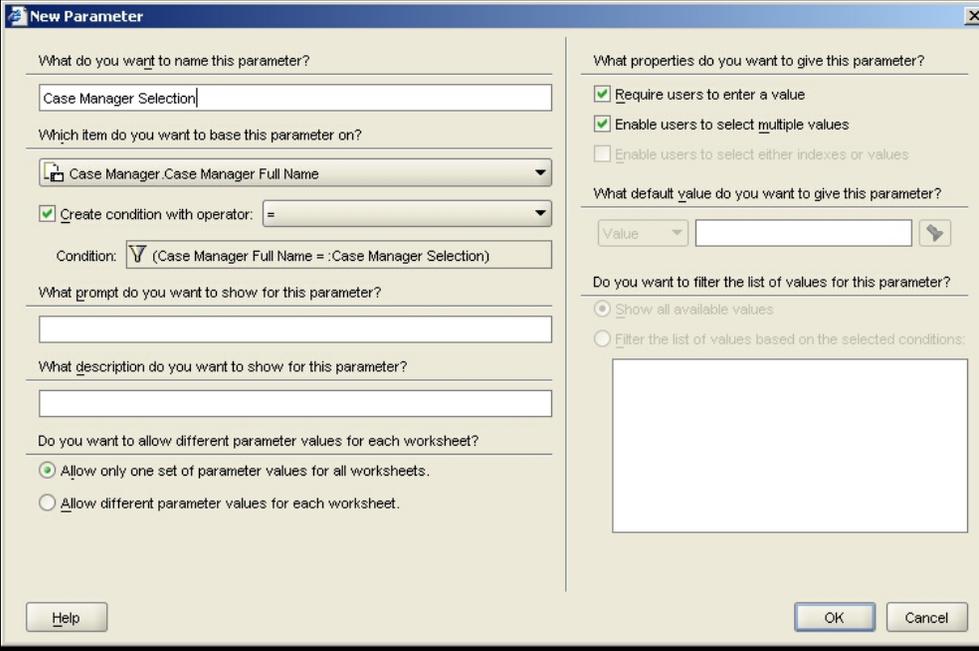
The screenshot shows the 'New Parameter' dialog box with the following configuration:

- Name:** (Empty text box)
- Base Item:** Case Manager.Case Manager Full Name
- Operator:** =
- Condition:** (Case Manager Full Name = :Case Manager Full Name Paramete
- Prompt:** (Empty text box)
- Description:** (Empty text box)
- Worksheet Values:** Allow only one set of parameter values for all worksheets.
- Properties:**
 - Require users to enter a value
 - Enable users to select multiple values
 - Enable users to select either indexes or values
- Default Value:** (Empty text box)
- Filtering:** Show all available values

Continued on next page

Step 5: Parameters, Continued

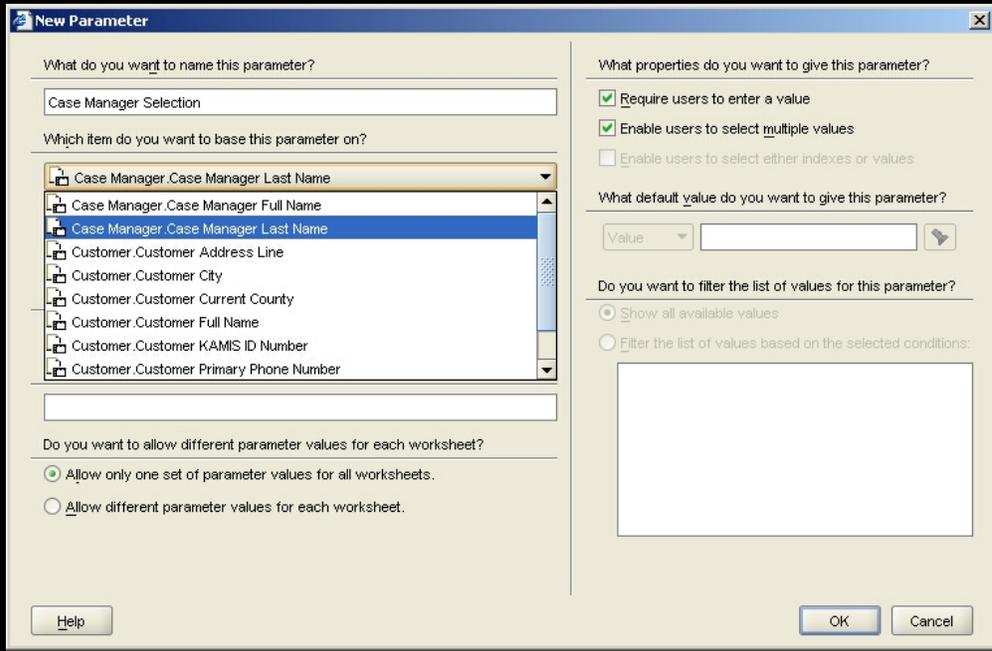
How to (continued)

Step	Action	Result
2.	What do you want to name this Parameter?	Enter a parameter name into field. If a name is not entered, The program creates a default Parameter name.
		

Continued on next page

Step 5: Parameters, Continued

How to (continued)

Step	Action	Result
3.	Which item do you want to base your parameter on?	Select an item for the parameter from the drop down list.
		

Continued on next page

Step 5: Parameters, Continued

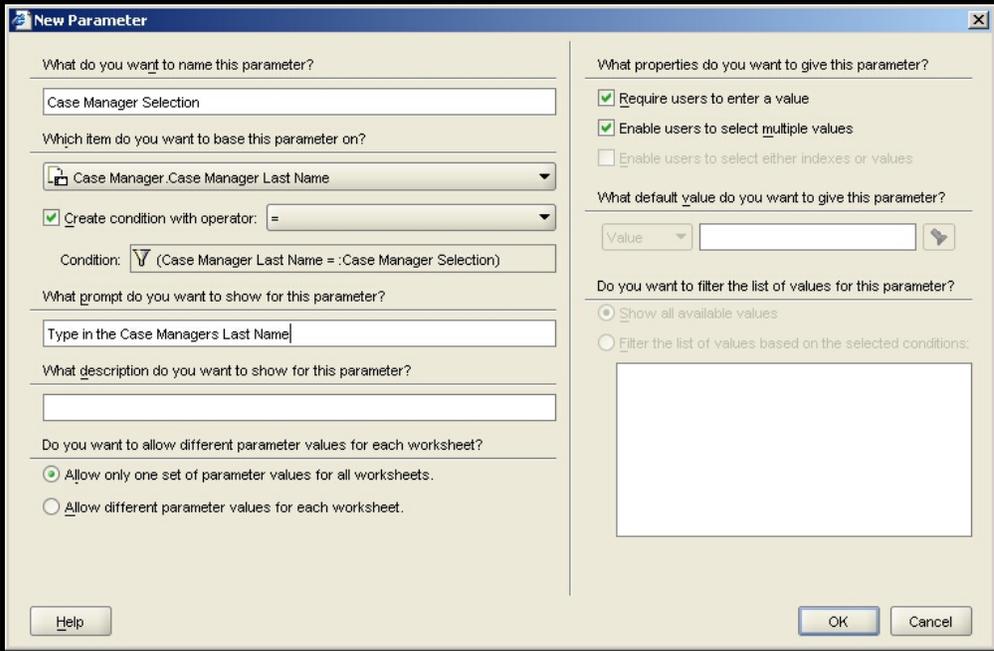
How to (continued)

Step	Action	Result
4.	Create condition with operator	Creates a condition using a mathematical expression.

Continued on next page

Step 5: Parameters, Continued

How to (continued)

Step	Action	Result
5.	What prompt do you want to show for this parameter?	Enter an instruction or question into the field. This prompt is displayed to when the worksheet is opened or refreshed.
		

Continued on next page

Step 5: Parameters, Continued

How to (continued)

Step	Action	Result
6.	What description do you want to show for this parameter?	Enter a brief description into the field. The description is displayed on the Edit Parameter Values dialog box.

The screenshot shows the 'New Parameter' dialog box with the following configuration:

- Name:** Case Manager Selection
- Base on:** Case Manager.Case Manager Last Name
- Create condition with operator:** =
- Condition:** (Case Manager Last Name = :Case Manager Selection)
- Prompt:** Type in the Case Managers Last Name
- Description:** Allows the selection of the Case Manager by Last Name
- Allow different parameter values for each worksheet?**
 - Allow only one set of parameter values for all worksheets.
 - Allow different parameter values for each worksheet.
- Properties:**
 - Require users to enter a value
 - Enable users to select multiple values
 - Enable users to select either indexes or values
- Default value:** Value dropdown, empty text box, and arrow button.
- Filter:**
 - Show all available values
 - Filter the list of values based on the selected conditions:

Continued on next page

Step 5: Parameters, Continued

How to (continued)

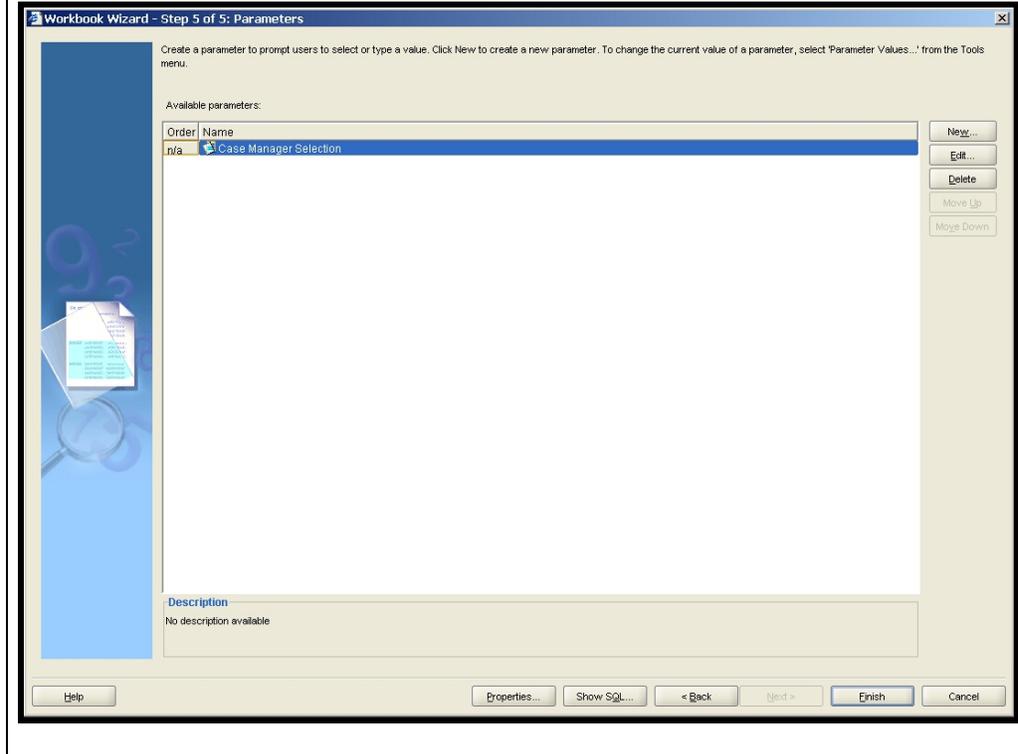
Step	Action	Result
7.	Do you want to allow different parameter values for each worksheet? Allow only one value for all Sheets radio button Allow a different value in each Sheet radio button	 The parameter value applies to the current worksheet only. Parameter value applies to all worksheets in the workbook that use this parameter.
8.	What properties do you want to give this parameter? Require users to enter a value check box Enable users to select multiple values check box	Both of these options are selected as defaults.
9.	What default value do you want to give this Parameter? (Optional) If required, enter a default value in the field.	<ul style="list-style-type: none">• Type a default value directly into the field.• If a list of values is available for this value, click the drop down arrow and select a parameter value from the list.
10.	Do you want to filter the list of values for this parameter?	This area is unavailable at this time and will be grayed out.

Continued on next page

Step 5: Parameters, Continued

How to (continued)

Step	Action	Result
11.	Click OK to save the parameter and the Wizard dialog box is redisplayed.	Notice that the parameter that you created is selected by default.



Continued on next page

Step 5: Parameters, Continued

How to (continued)

Step	Action	Result
12.	Click on Finish button	Workbook Wizard will advance to the Results Window. The parameter dialog will be displayed. Once answered the query will start to process.

Edit Parameter Values

Select values for the following parameters:

Type in the Case Managers Last Name*: SMITH

Description

Allows the selection of the Case Manager by Last Name

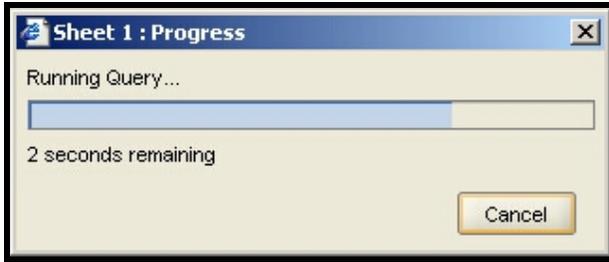
* indicates required field.

Help OK Cancel

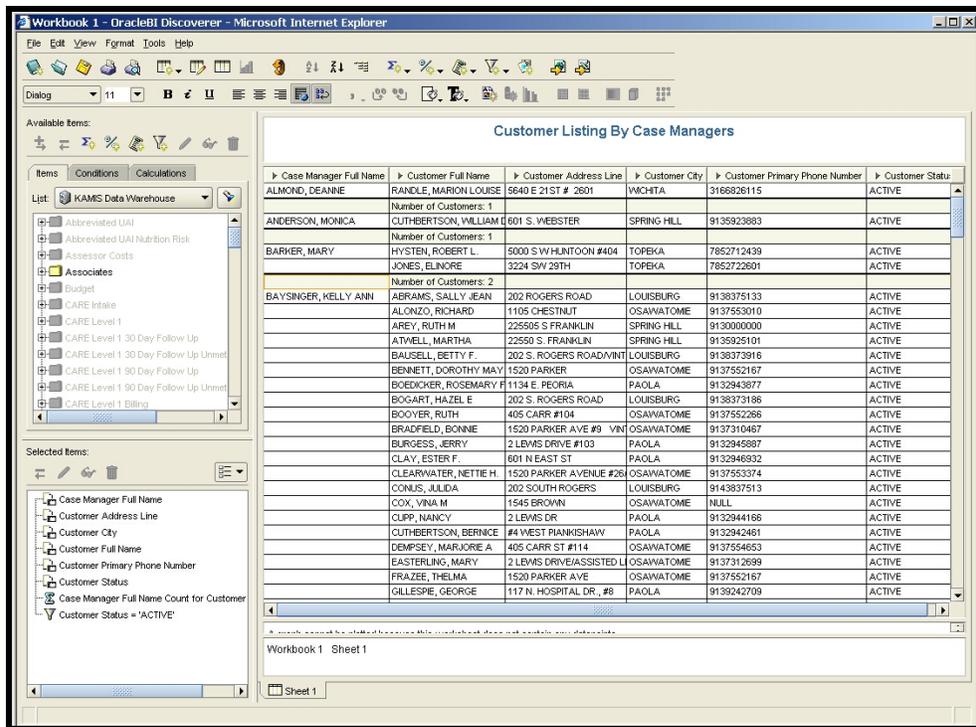
The Results Window

Introduction

Once the finish button is selected the query will start processing. A dialog box will be displayed while the query processes. Once completed the results window will be displayed.



Results Window



The default view of the Result Window can be customized. The view options are discussed in Chapter 5.

Chapter 5

Worksheet Edit and Viewing Options

Table of Contents

Renaming a Worksheet.....	1
Moving Worksheet Order	6
Delete a Worksheet	9
Changing Result Window Format	12
Edit Worksheet.....	18
Workbook / Worksheet Options	20

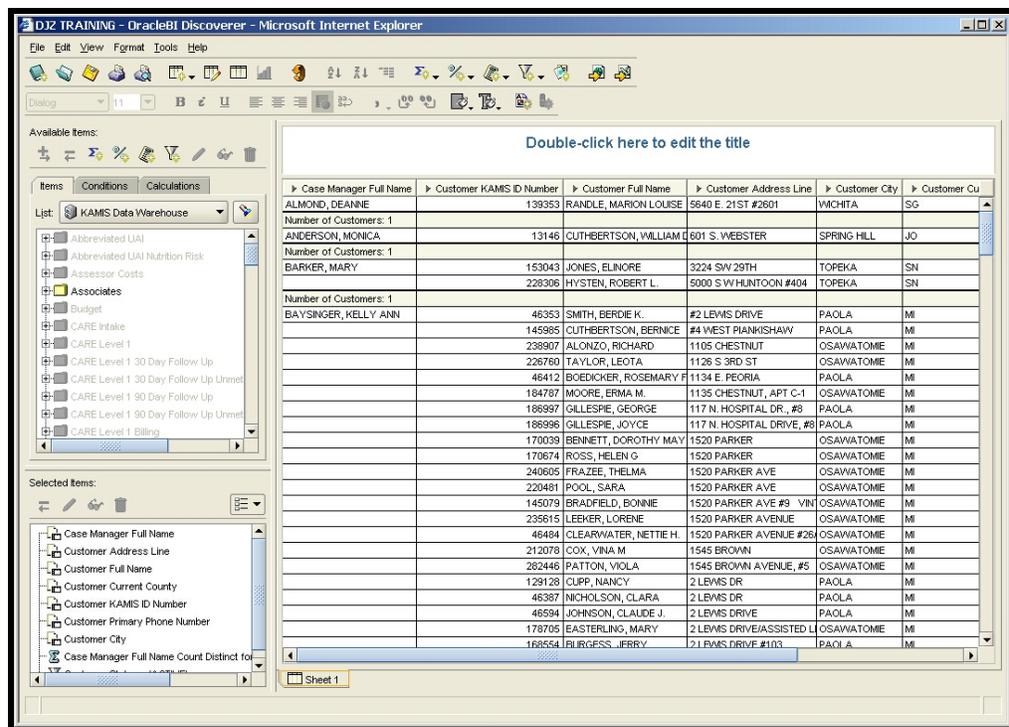
Renaming a Worksheet

Introduction

The worksheet name default is “Sheet #”. The name of the worksheet defaults to the title on a printed report. To allow for a title on the report to indicate the data it represents the worksheet name needs to be changed.

There are two options available on changing the worksheet name.

- Menu Bar
- Worksheet Tab

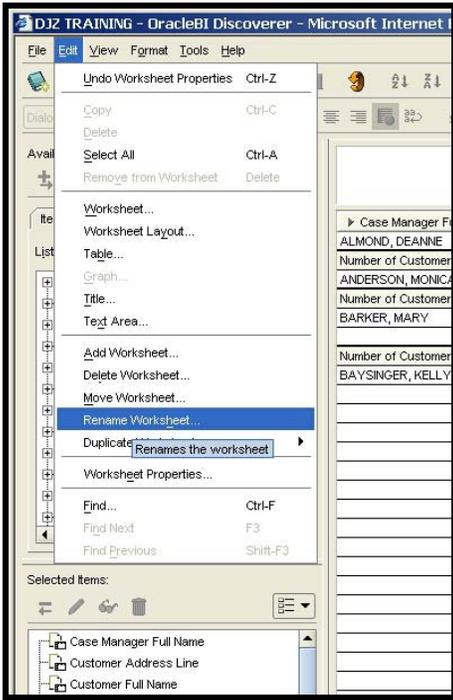


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Renaming a Worksheet, Continued

How To

Follow the steps in the table below to rename a worksheet using the Menu Bar and the Worksheet Tab option.

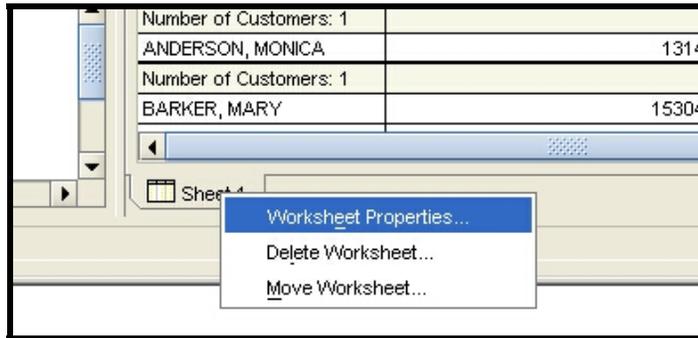
Step	Action	Result
1.	On the Menu bar click on Edit	Menu options expand
 <p>The screenshot shows the 'Edit' menu in OracleBI Discoverer. The 'Rename Worksheet...' option is highlighted in blue. Other visible options include 'Undo Worksheet Properties', 'Copy', 'Delete', 'Select All', 'Remove from Worksheet', 'Worksheet...', 'Worksheet Layout...', 'Table...', 'Graph...', 'Title...', 'Text Area...', 'Add Worksheet...', 'Delete Worksheet...', 'Move Worksheet...', 'Duplicate', 'Worksheet Properties...', 'Find...', 'Find Next', and 'Find Previous'. The background shows a data grid with columns like 'Case Manager Full Name', 'Customer Address Line', and 'Customer Full Name'.</p>		
2.	Click on Rename Worksheet	Worksheet Properties dialog box is displayed.
OR		

Continued on next page

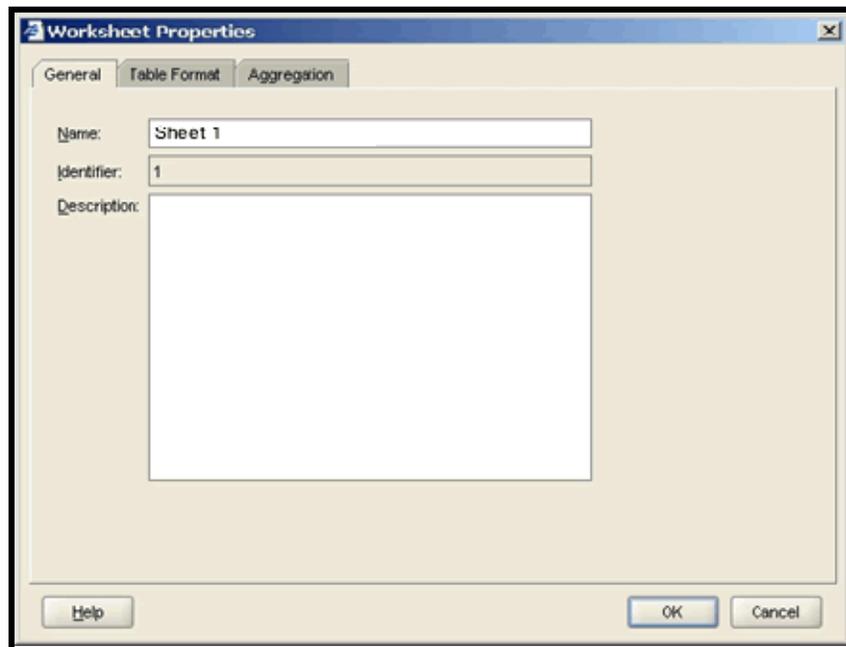
Renaming a Worksheet, Continued

How To (continued)

Step	Action	Result
3.	On the Name area of the Worksheet Tab, right mouse click.	Shortcut Menu options expand



4.	Click on Worksheet Properties	Worksheet Properties dialog box is displayed.
----	--------------------------------------	---

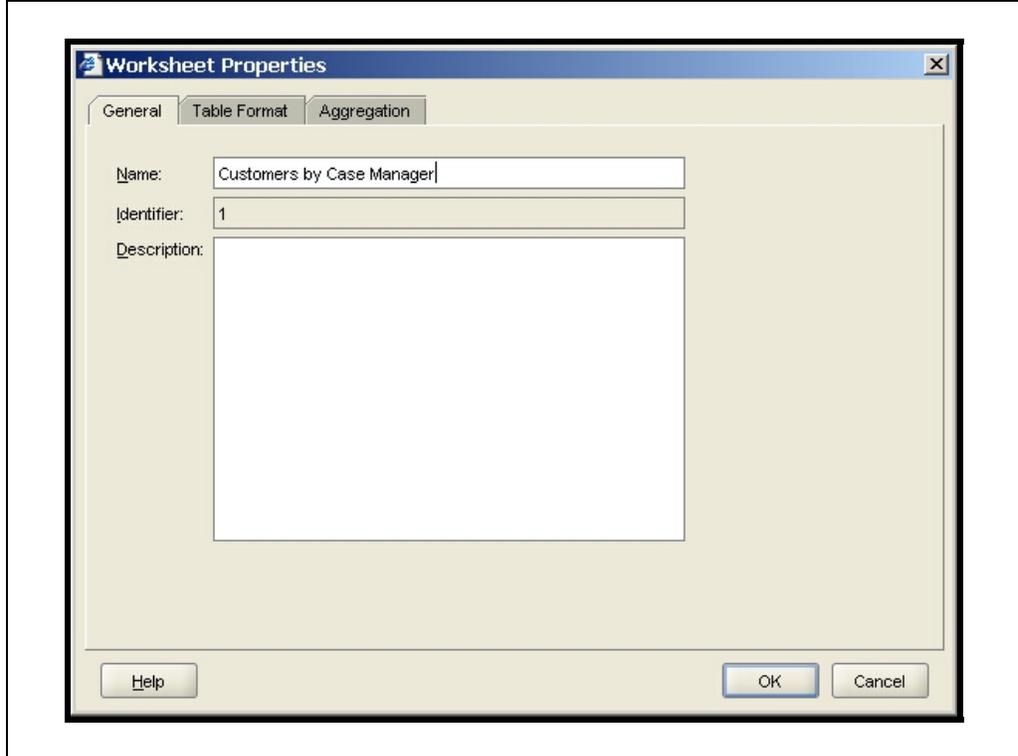


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Renaming a Worksheet, Continued

How To (continued)

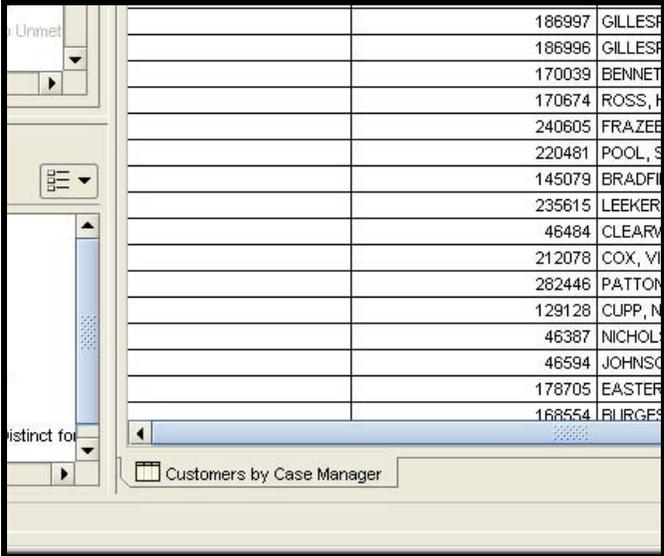
Step	Action	Result
5.	Type new worksheet name.	Replaces old name with new name.



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Renaming a Worksheet, Continued

How To (continued)

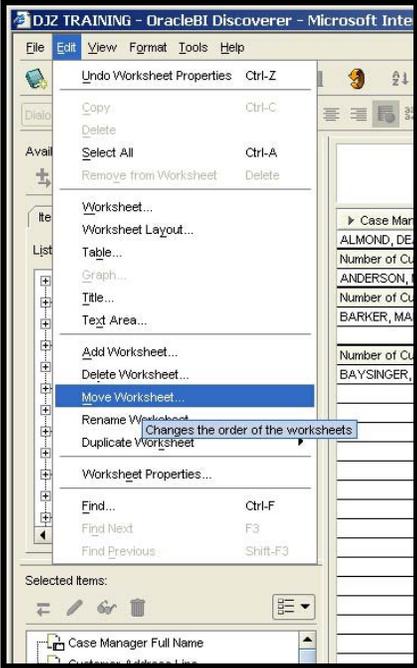
Step	Action	Result
6.	Click on the OK button.	Rename Worksheet dialog box closes. Worksheet name is updated.
		

Moving Worksheet Order

Introduction There are two options available on changing the order of the worksheets.

- Menu Bar
- Worksheet Tab

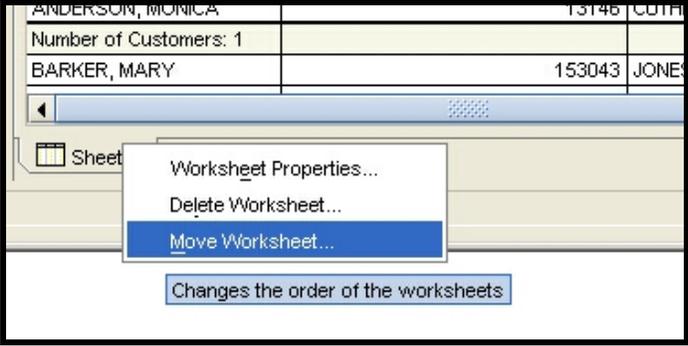
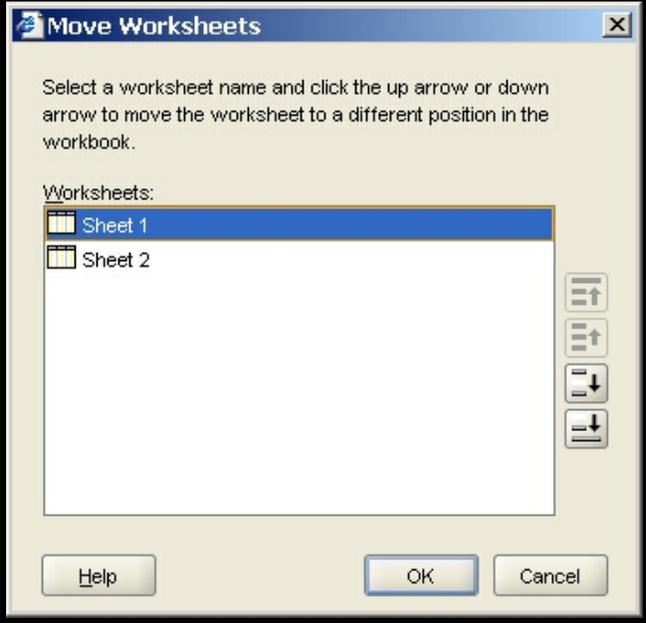
How To Follow the steps in the table below to reorder the worksheets using the Menu Bar or the Worksheet Tab option.

Step	Action	Result
1.	On the Menu bar click on Edit	Menu options expand
		
OR		

Continued on next page

Moving Worksheet Order, Continued

How To (continued)

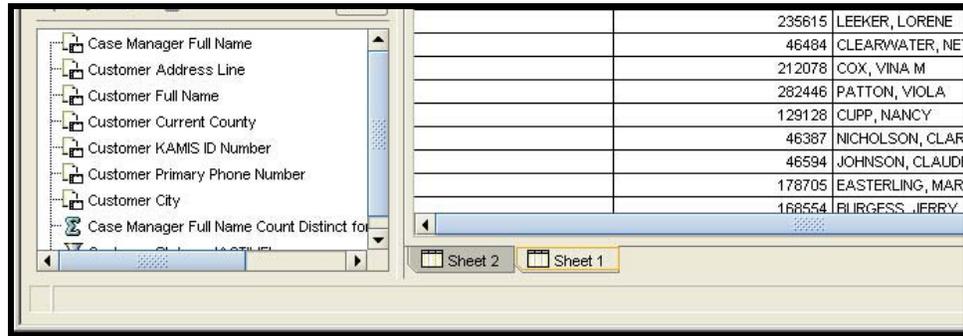
Step	Action	Result
2.	On the Name area of the Worksheet Tab, right mouse click.	Shortcut Menu options expand
		
3.	Click on Move Worksheet	Move Worksheet dialog box is displayed
		

Continued on next page

Moving Worksheet Order, Continued

How To (continued)

Step	Action	Result						
7.	Click on the Sheet to be moved.	Sheet name is highlighted.						
8.	Click on the appropriate arrow buttons							
	<table border="1"> <thead> <tr> <th>Button</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Up button</td> <td>Moves the highlighted sheet up in the order.</td> </tr> <tr> <td>Down button</td> <td>Moves the highlighted sheet down in the order.</td> </tr> </tbody> </table>	Button	Action	Up button	Moves the highlighted sheet up in the order.	Down button	Moves the highlighted sheet down in the order.	
Button	Action							
Up button	Moves the highlighted sheet up in the order.							
Down button	Moves the highlighted sheet down in the order.							
9.	Click on the OK button.	Move Worksheets dialog box closes. Worksheet order is updated.						



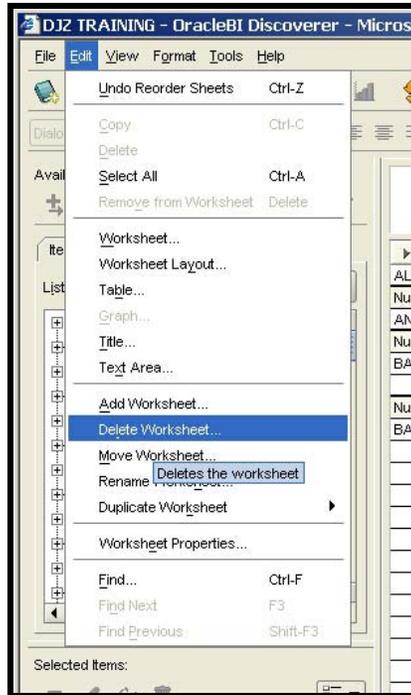
Delete a Worksheet

Introduction There are two options available in deleting a worksheet from a workbook.

- Menu Bar
- Worksheet Tab

How To Follow the steps in the table below to delete a worksheet using the Menu Bar or the Worksheet Tab option.

Step	Action	Result
1.	Click on the Worksheet to be deleted.	Worksheet name tab is highlighted.
2.	On the Menu bar click on Edit	Menu options expand

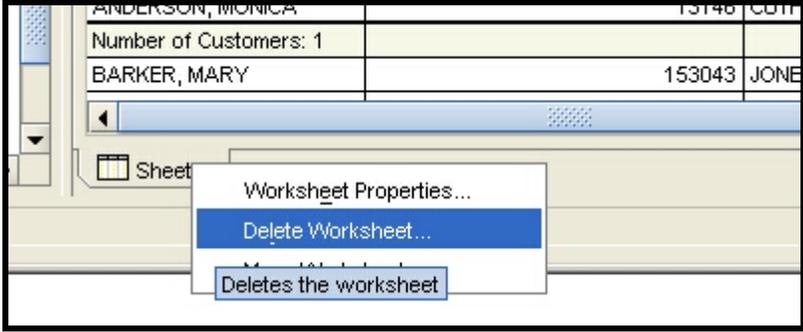
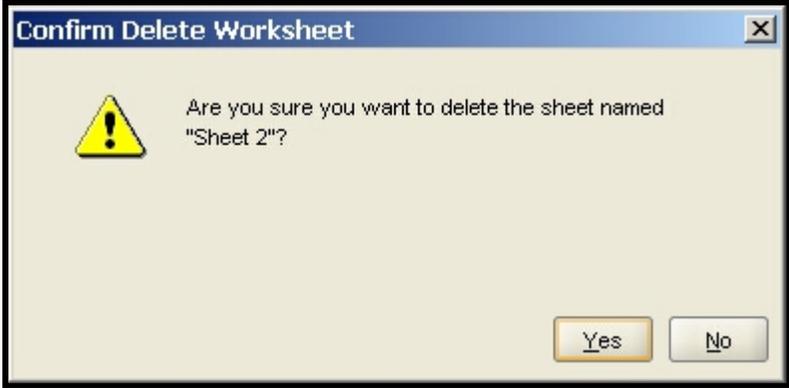


OR

Continued on next page

Delete a Worksheet, Continued

How To (continued)

Step	Action	Result
4.	On the Name area of the Worksheet Tab, right mouse click .	Shortcut Menu options expand
		
5.	Click on Delete Worksheet	Delete Worksheet dialog box verifying deletion of the worksheet.
		

Continued on next page

Delete a Worksheet, Continued

How To (continued)

Step	Action	Result
6.	Click on the Yes button.	Worksheet is deleted from the workbook.

The screenshot displays the OracleBI Discoverer interface within a Microsoft Internet Explorer browser window. The main content area shows a worksheet titled "Customers By Case Manager" with the following data:

Case Manager Full Name	Customer KAMS ID Number	Customer Full Name	Customer Address Line	Customer City	Customer County
ALMOND, DEANNE	139353	RANDLE, MARION LOUISE	5640 E. 21ST #2801	WICHITA	SG
Number of Customers: 1					
ANDERSON, MONICA	13146	CUTHERBERTSON, WILLIAM C	601 S. WEBSTER	SPRING HILL	JO
Number of Customers: 1					
BARKER, MARY	153043	JONES, ELINORE	3224 SW 29TH	TOPEKA	SN
	228306	HYSTEN, ROBERT L.	5000 S W HUNTOON #404	TOPEKA	SN
Number of Customers: 1					
BAYSINGER, KELLY ANN	46353	SMITH, BERTIE K.	#2 LEWIS DRIVE	PAOLA	MI
	145985	CUTHERBERTSON, BERNICE	#4 WEST PIANKSHAW	PAOLA	MI
	238907	ALONZO, RICHARD	1105 CHESTNUT	OSAVIATOMIE	MI
	226760	TAYLOR, LEOTA	1126 S 3RD ST	OSAVIATOMIE	MI
	46412	BOEDICKER, ROSEMARY F	1134 E. PEORIA	PAOLA	MI
	184787	MOORE, ERMA M.	1135 CHESTNUT, APT C-1	OSAVIATOMIE	MI
	186997	GILLESPIE, GEORGE	117 N. HOSPITAL DR., #8	PAOLA	MI
	186996	GILLESPIE, JOYCE	117 N. HOSPITAL DRIVE, #8	PAOLA	MI
	170039	BENNETT, DOROTHY MAY	1520 PARKER	OSAVIATOMIE	MI
	170674	ROSS, HELEN G	1520 PARKER	OSAVIATOMIE	MI
	240605	FRAZEE, THELMA	1520 PARKER AVE	OSAVIATOMIE	MI
	220481	POOL, SARA	1520 PARKER AVE	OSAVIATOMIE	MI
	145079	BRADFIELD, BONNIE	1520 PARKER AVE #9 VINI	OSAVIATOMIE	MI
	235615	LEEKER, LORENE	1520 PARKER AVENUE	OSAVIATOMIE	MI
	46484	CLEARWATER, NETTIE H.	1520 PARKER AVENUE #26	OSAVIATOMIE	MI
	212078	COX, VINA M	1545 BROWN	OSAVIATOMIE	MI
	282446	PATTON, VIOLA	1545 BROWN AVENUE, #5	OSAVIATOMIE	MI
	129126	CJPP, NANCY	2 LEWIS DR	PAOLA	MI
	46387	NICHOLSON, CLARA	2 LEWIS DR	PAOLA	MI
	46594	JOHNSON, CLAUDE J.	2 LEWIS DRIVE	PAOLA	MI
	178705	EASTERLING, MARY	2 LEWIS DRIVE/ASSISTED	OSAVIATOMIE	MI
	168554	BURGESS, JERRY	2 LEWIS DRIVE #103	PAOLA	MI

Changing Result Window Format

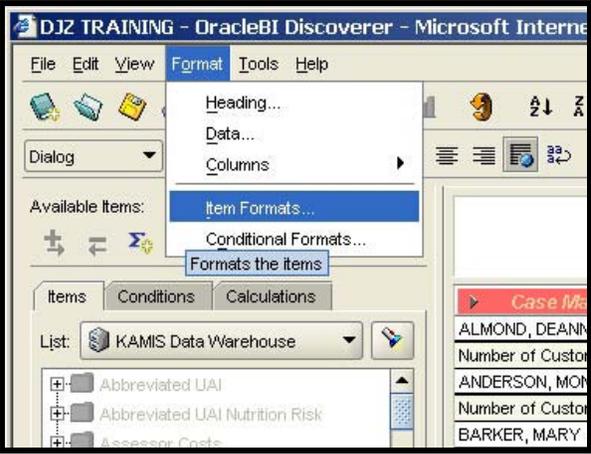
Introduction There are two options available in how a worksheets view can be changed.

- Menu Bar
- Option Button on the Wizard

Introduction This step of the wizard allows the formatting defaults to be changed. The formatting effects how the Headings and Data of the results are displayed. For example:

- Format a numeric value to a currency format
- Modify the number of decimal places displayed
- Format the background or font colors
- Format the font size.

Menu Bar How To Follow the steps in the table below to change the view option of the data in the result window from the Menu Bar.

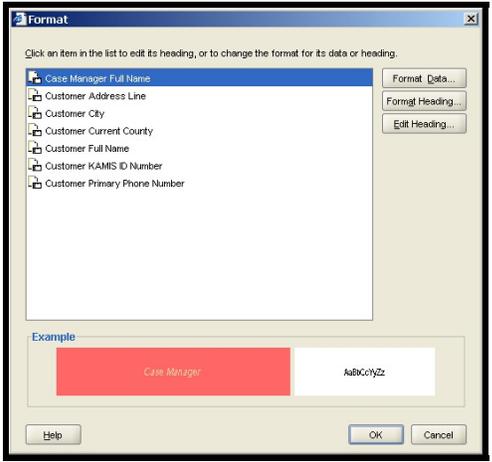
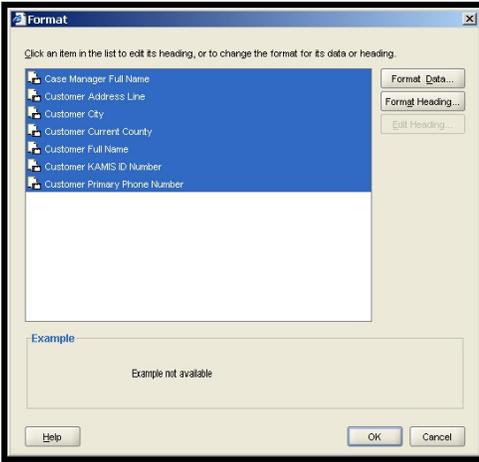
Step	Action	Result
1.	Click on Format on the Menu Bar.	Menu options expand.
		
2.	Select Item Formats	Format dialog box is displayed.

Continued on next page

Changing Result Window Format, Continued

How To Format

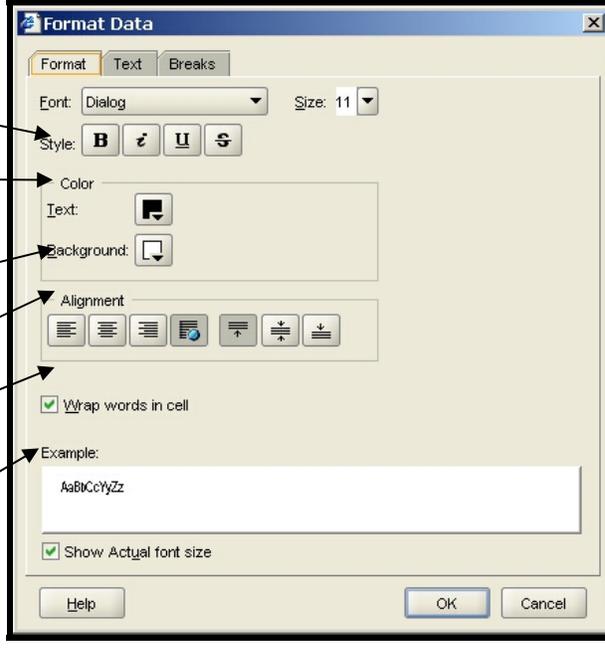
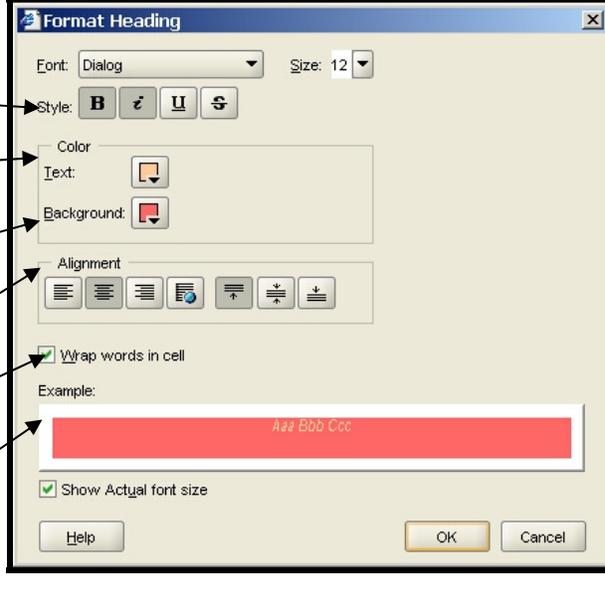
Follow the steps in the table below to format the Data section of the Results window.

Step	Action	Result
1.	<p>Click on the item in the listing to format the heading.</p> <p>{Ctrl} + Click will select more than one line at the time.</p>	Item line(s) will be highlighted.
		
2.	<p>Click on the Format Data or the Format Heading button.</p>	Format Data or Heading dialog box will be displayed.

Continued on next page

Changing Result Window Format, Continued

How To Format (continued)

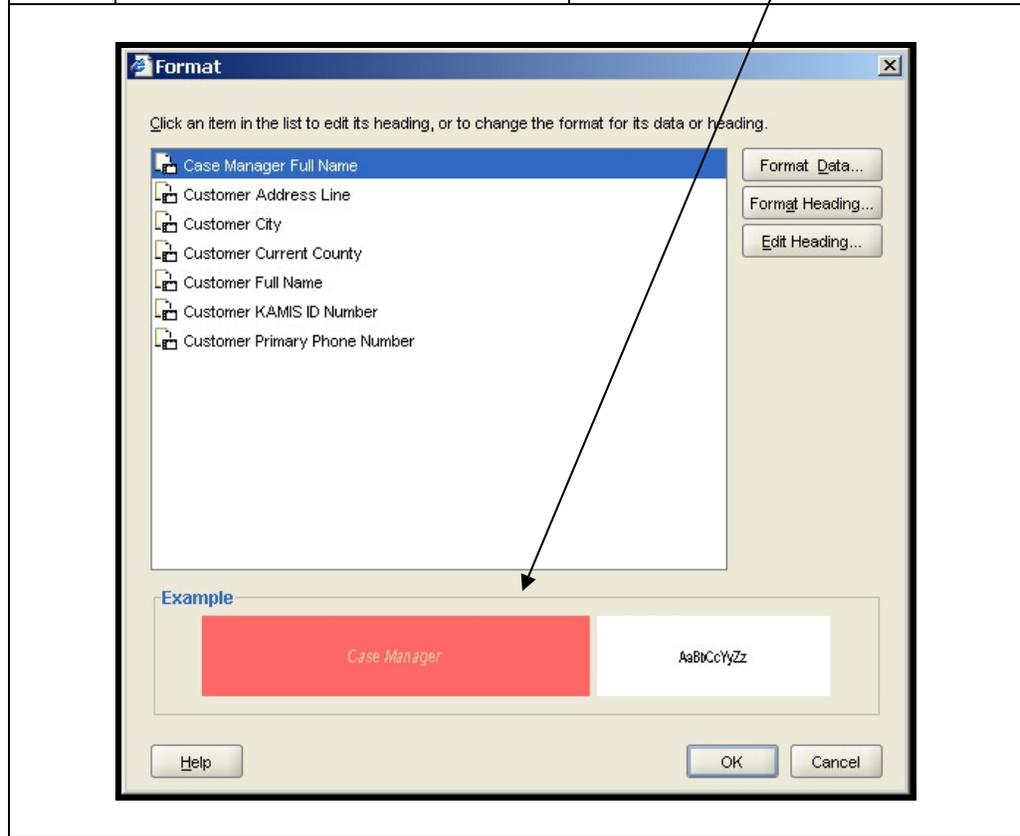
<p>DATA</p> <p>Font Type and Size</p> <p><u>Font Style</u> Bold, Italics, Underline, Strike-through</p> <p>Text Color</p> <p>Background Color</p> <p><u>Text Alignment</u> Horizontally Vertically</p> <p>Word Wrap</p>	
<p>HEADING</p> <p>Font Type and Size</p> <p><u>Font Style</u> Bold, Italics, Underline, Strike-through</p> <p>Text Color</p> <p>Background Color</p> <p><u>Text Alignment</u> Horizontally Vertically</p> <p>Word Wrap</p>	

Continued on next page

Changing Result Window Format, Continued

How To Format (continued)

Step	Action	Result
3.	Change format options as desired.	
	Click on the OK button.	Dialog box will close and format example will change according to the selection.



Continued on next page

Changing Result Window Format, Continued

How To Format (continued)

Step	Action	Result
4.	Click on the OK button	Worksheet will be updated.

The screenshot displays the OracleBI Discoverer interface. The main window shows a worksheet titled "Customers By Case Manager" with the following data:

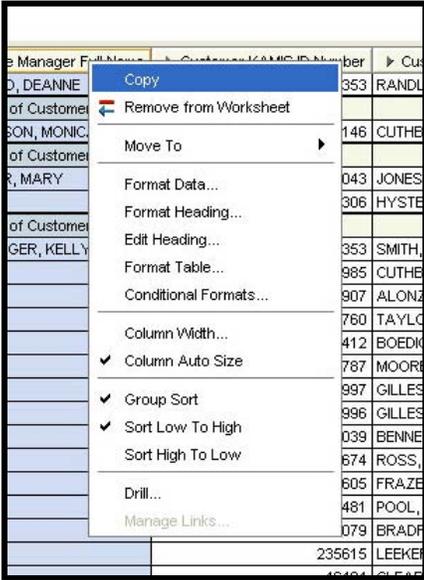
Case Manager	Customer KAMIS ID Number	Customer Full Name	Customer Address Line	Customer City
ALMOND, DEANNE	139353	RANDLE, MARION LOUISE	5640 E. 21ST #2601	WICHITA
Number of Customers: 1				
ANDERSON, MONICA	13146	CUTHBERTSON, WILLIAM D.	601 S. WEBSTER	SPRING HILL
Number of Customers: 1				
BARKER, MARY	153043	JONES, ELINORE	3224 SW 29TH	TOPEKA
	228306	HYSTEN, ROBERT L.	5000 S W HUNTOON #404	TOPEKA
Number of Customers: 1				
BAYSINGER, KELLY ANN	46353	SMITH, BERDIE K.	#2 LEWIS DRIVE	PAOLA
	145985	CUTHBERTSON, BERNICE	#4 WEST PIANKISHAW	PAOLA
	238907	ALONZO, RICHARD	1105 CHESTNUT	OSAWATOMIE
	226760	TAYLOR, LEOTA	1126 S 3RD ST	OSAWATOMIE
	46412	BOEDICKER, ROSEMARY F.	1134 E. PEORIA	PAOLA
	184787	MOORE, ERMA M.	1135 CHESTNUT, APT C-1	OSAWATOMIE
	186997	GILLESPIE, GEORGE	117 N. HOSPITAL DR., #8	PAOLA
	186996	GILLESPIE, JOYCE	117 N. HOSPITAL DRIVE, #8	PAOLA
	170039	BENNETT, DOROTHY MAY	1520 PARKER	OSAWATOMIE
	170674	ROSS, HELEN G	1520 PARKER	OSAWATOMIE
	240605	FRAZEE, THELMA	1520 PARKER AVE	OSAWATOMIE
	220481	POOL, SARA	1520 PARKER AVE	OSAWATOMIE
	145079	BRADFIELD, BONNIE	1520 PARKER AVE #9 VINTAGE	OSAWATOMIE
	235615	LEEKER, LORENE	1520 PARKER AVENUE	OSAWATOMIE
	46484	CLEARWATER, NETTIE H.	1520 PARKER AVENUE #26/VINTAGE	OSAWATOMIE
	212078	COX, YVINA M	1545 BROWN	OSAWATOMIE
	282446	PATTON, VIOLA	1545 BROWN AVENUE, #5	OSAWATOMIE
	129128	CUPP, NANCY	2 LEWIS DR	PAOLA
	46387	NICHOLSON, CLARA	2 LEWIS DR	PAOLA
	46594	JOHNSON, CLAUDE J.	2 LEWIS DRIVE	PAOLA
	178705	EASTERLING, MARY	2 LEWIS DRIVE/ASSISTED LIVING	OSAWATOMIE
	168554	BURGESS, JERRY	2 LEWIS DRIVE #103	PAOLA

Continued on next page

Changing Result Window Format, Continued

Note

The same can be achieved by using the shortcut menu method.

Step	Action	Result
1.	Right Mouse click on the table so that the area to be formatted is highlighted.	Shortcut Menu is displayed.
		
2.	Select either Format Data or Format Heading	The same format dialog boxes will be displayed as explained previously.

Edit Worksheet

Introduction Any changes made to the options will affect the current worksheet and all worksheets in the future.

How To The below sections will cover the detailed instructions to edit the worksheet configuration per window tab.

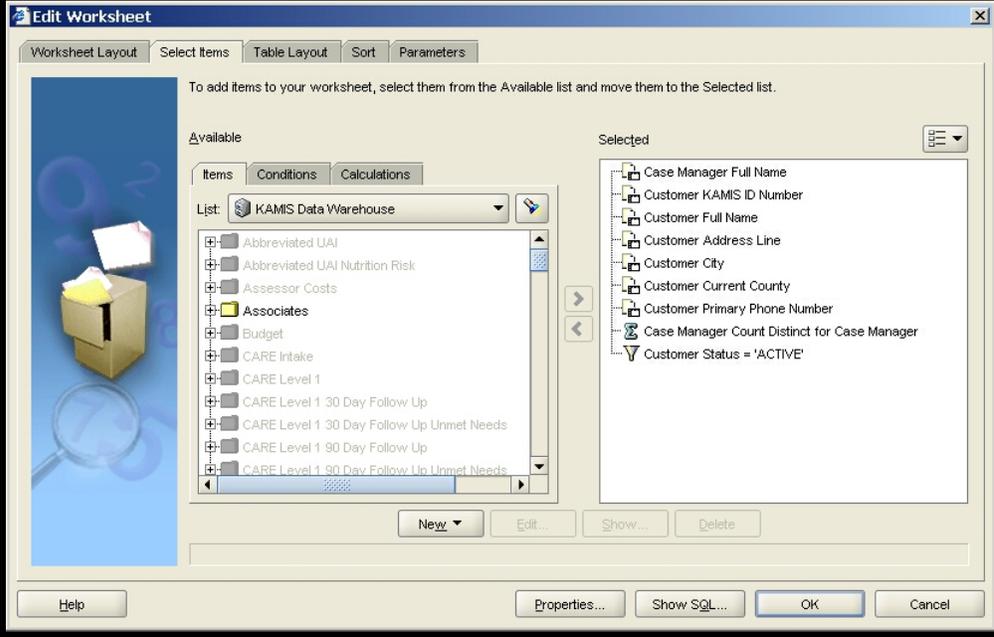
Step	Action	Result
1.	Click on Edit on the Menu bar	Menu options expand

A screenshot of the OracleBI Discoverer application window titled "DJZ TRAINING - OracleBI Discoverer - Micro". The "Edit" menu is open, showing various options. The "Worksheet..." option is highlighted in blue, and a tooltip next to it reads "Worksheet L Edits the current worksheet". Other menu items include Undo (Ctrl-Z), Copy (Ctrl-C), Delete, Select All (Ctrl-A), Remove from Worksheet (Delete), Worksheet L..., Table..., Graph..., Title..., Text Area..., Add Worksheet..., Delete Worksheet..., Move Worksheet..., Rename Worksheet..., Duplicate Worksheet, Worksheet Properties..., Find... (Ctrl-F), Find Next (F3), and Find Previous (Shift-F3). The status bar at the bottom of the window shows "Selected Items:".

Continued on next page

Edit Worksheet, Continued

How To (continued)

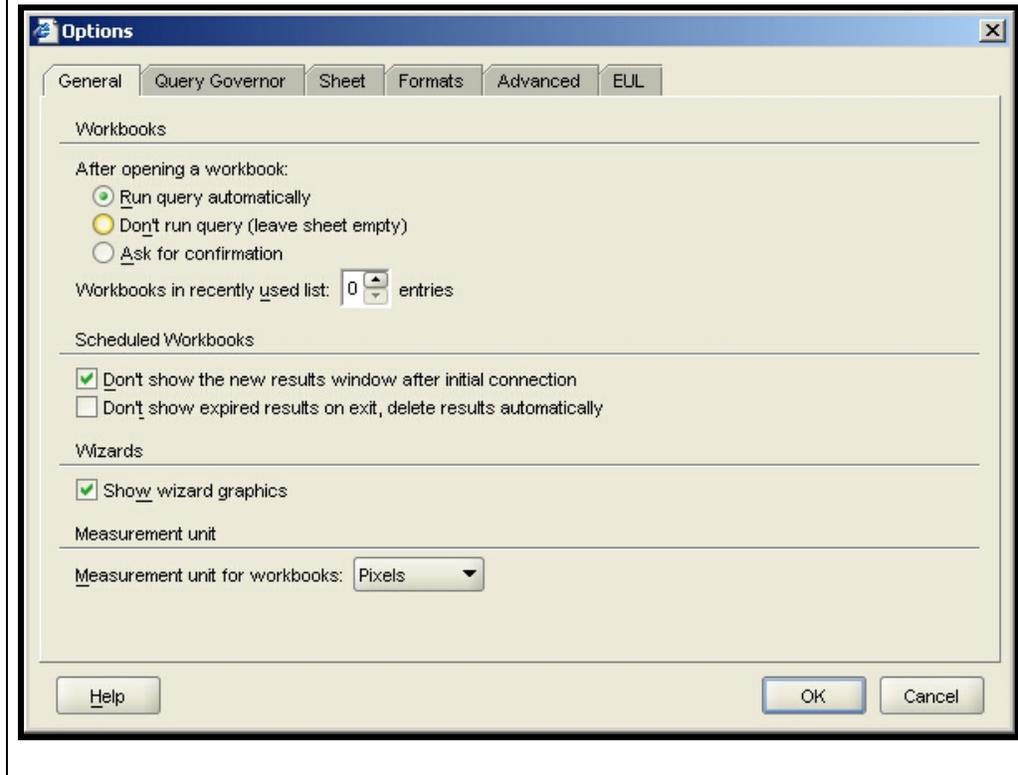
Step	Action	Result
2.	Select on Worksheet	Edit Worksheet dialog box is displayed.
		
3.	Each tab represents a step in the Workbook Wizard Window . Instructions for each tab are located in Chapter 4	

Workbook / Worksheet Options

Introduction Any changes made to the options will affect the current worksheet and all worksheets in the future.

How To The below sections will cover the detailed instructions to edit the worksheet configuration per window tab.

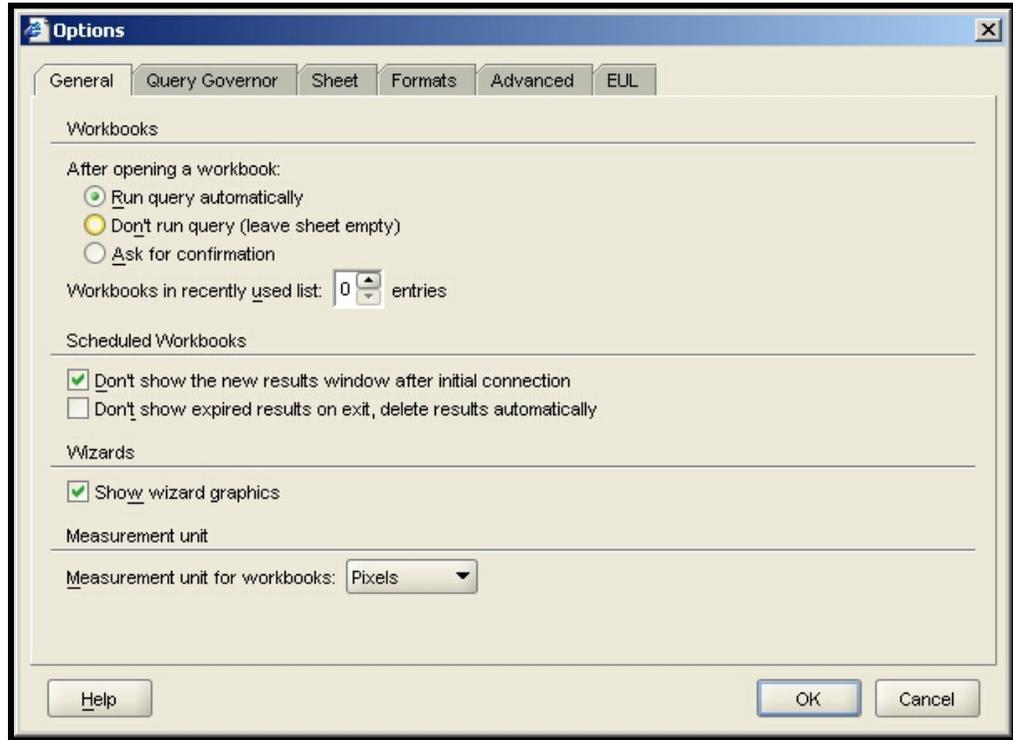
Step	Action	Result
1.	Click on Tools on the Menu bar	Menu options expand.
2.	Click on Options	Options dialog box is displayed.



Continued on next page

Workbook / Worksheet Options, Continued

General Tab This tab will specify how Discoverer will display worksheets.



Workbooks Section

Option	Result
After running a workbook	Three options are available.
Run query automatically	Always display up-to-date data in the worksheet.
Don't run query (leave sheet empty)	When a worksheet is first opened, it will remain empty.
Ask for confirmation	Confirmation is given before worksheets are refreshed with up-to-date data.

Continued on next page

Workbook / Worksheet Options, Continued

Scheduled Workbooks Section

This is not a current option within KAMIS Ad hoc Queries. However, a brief description is included below.

Option	Result
Don't show the new results window after connecting to database	No notice regarding new scheduled workbook results that are available.
Don't show expired results on exit; delete results automatically	Will give notice regarding expired scheduled workbook results and a confirmation concerning whether they should be deleted.

Wizards Section

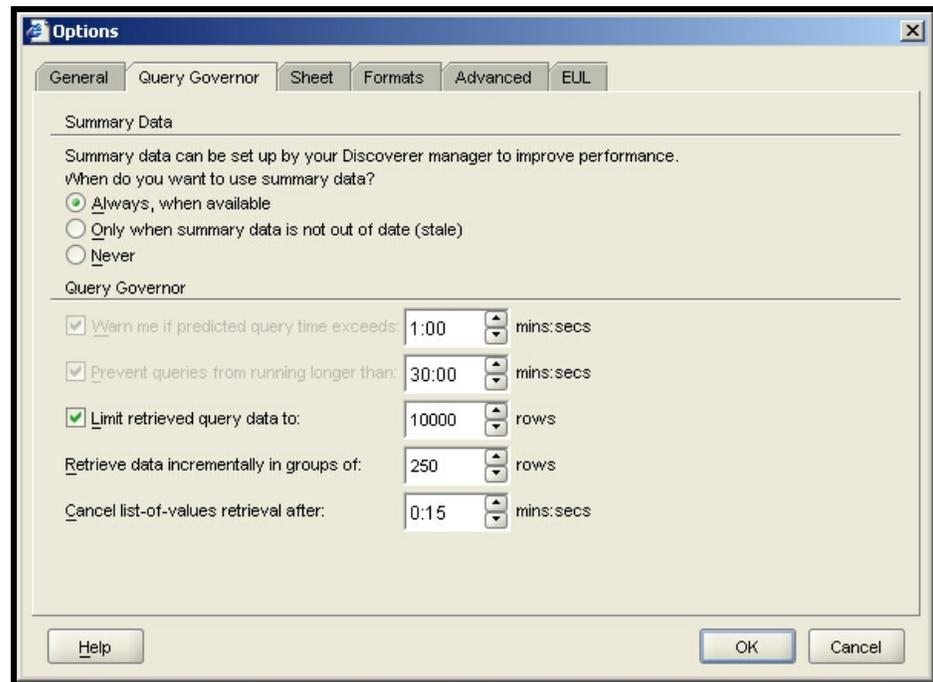
Option	Result
Show wizard graphics	Display or hide graphics on wizard dialog boxes/windows. Graphics are used as visual aids to choosing options.

Continued on next page

Workbook / Worksheet Options, Continued

Query Governor

These options within KAMIS Ad hoc Queries should not be changed. They are configured by the Data Administrator and Oracle recommendations. However, a brief description is included below.



Continued on next page

Workbook / Worksheet Options, Continued

Summary Data Section -

Summaries are set by the Data Administrator.

Option		Result
When do you want to use Summary data?		
	Always, when available Default - selected	Discoverer will use summaries automatically where possible.
	Only when summary data is not out of date (stale)	Discoverer will use summaries when up-to-date data is available.
	Never	Discoverer will not use summaries.

Query Governor Section

These options within KAMIS Ad hoc Queries should not be changed.

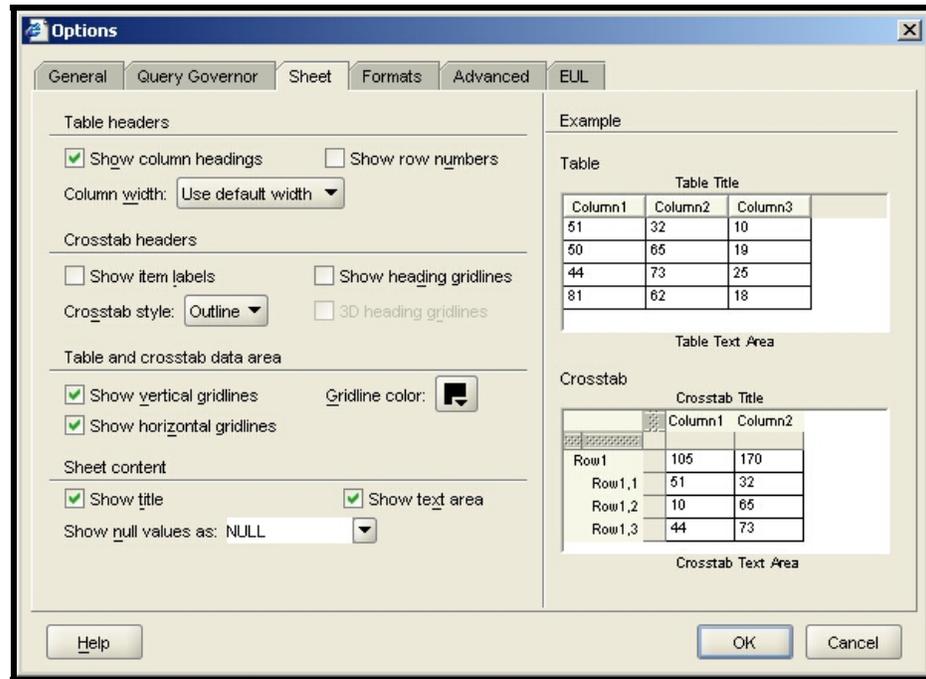
Option	Result
Warn me if predicted time exceeds: Default – Off and Read Only	Warning is given when the predicted query times exceed the time defined.
Prevent queries from running greater than: Default – Off and Read Only	Will not run queries when the predicted query time exceeds the time defined.
Limit retrieved query data to: Default – Set to 10,000	Will not retrieve more than the number of rows defined.
Retrieve data incrementally in groups of: Default – Set to 2,500	Will define how many rows to retrieve from the database at one time.
Cancel list of values retrieval after: Default – Set to 1:01	Defines the maximum time to wait while Discoverer retrieves list of values items.

Continued on next page

Workbook / Worksheet Options, Continued

Sheet

Use this tab to configure the way that the current worksheet is displayed.



Show Section

Option	Result
Title	Will display or hide the worksheet title. The title, defaults to the worksheet name.
Horizontal and vertical cell gridlines	Will lay or hide gridlines on the worksheet.
Null values as:	A pull down list will specify how null (or empty) values are displayed.
Values that cannot be aggregated as	A pull down list will specify how values that cannot be aggregated are displayed.

Continued on next page

Workbook / Worksheet Options, Continued

Style Section

Option	Result
Row numbers	Will display or hide row numbers on worksheets.

Screen page layout Section

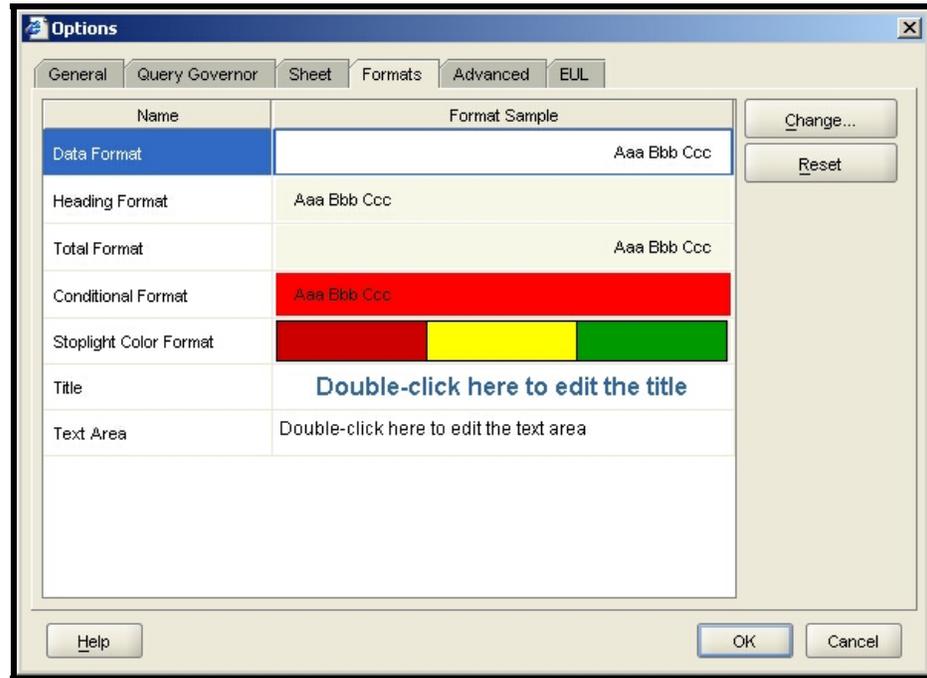
Option	Result
Rows per screen page	Will specify how many rows are displayed on a worksheet at one time.

Continued on next page

Workbook / Worksheet Options, Continued

Formats

Use this tab to change the default worksheet format that is used for new worksheets.



Option	Result
Change Button	Use this button to display the Format dialog box.
Reset Button	Cancel any changes made and returns to the original default settings.
Example Area	Displays how the item will be displayed on the worksheet.

NOTE:

- Changing the default style does not affect existing worksheets.
- Changing the default style does affect new items on existing worksheets.

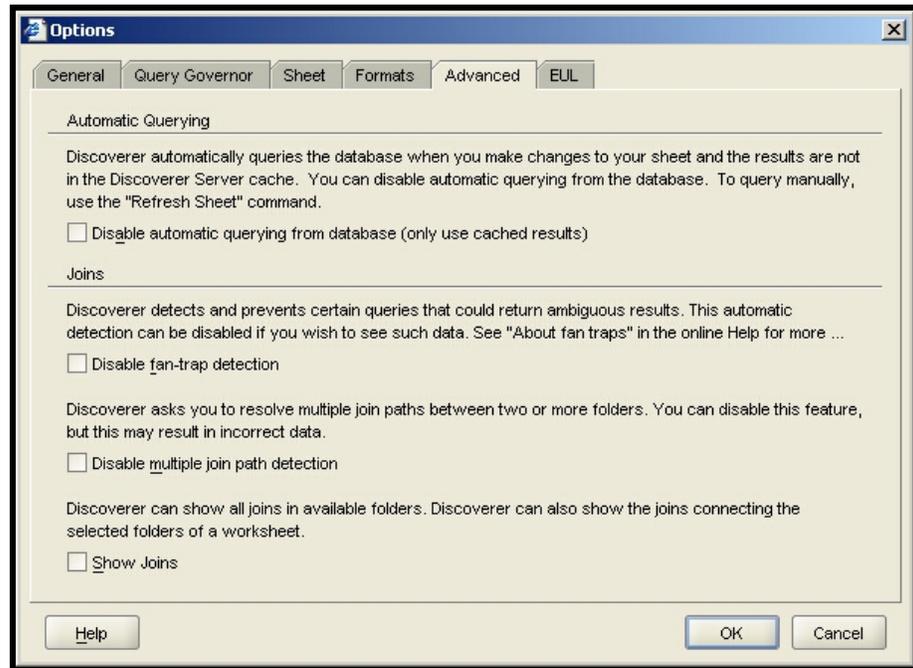
Continued on next page

Workbook / Worksheet Options, Continued

Advanced

Use this tab to configure the way workbook data is kept up-to-date, and how complex data is processed.

These options within KAMIS Ad hoc Queries should not be changed. They are configured by the Data Administrator and Oracle recommendations. However, a brief description is included below.



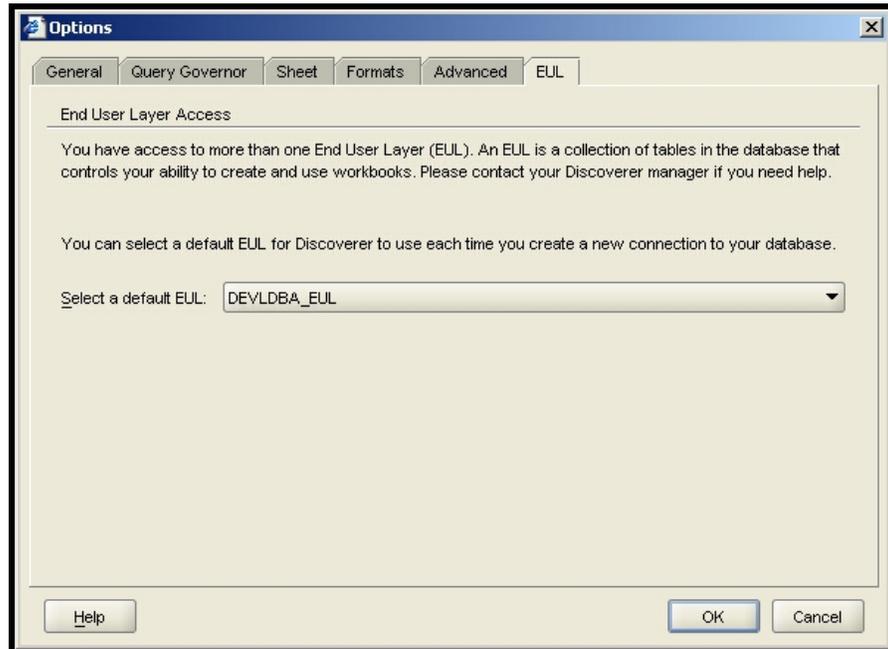
Option	Result
Disable automatic querying? Default – Unchecked	Allows the worksheet to be refreshed when the sheet format is changed.
Disable fan trap detection? Default - Checked	Discoverer detects potential fan trap configurations, generates the correct SQL and displays correct worksheet data.
Disable multiple join paths? Default - Unchecked	Discoverer displays the "Join folders dialog" (where more than one join exists between two folders) when you create a worksheet.

Continued on next page

Workbook / Worksheet Options, Continued

EUL

Select a default End User Layer (EUL) connection when Discoverer is accessed.



End User Layer Access Section

Option	Result
Select a default EUL	Data Administrator has configured access to one EUL, this is a read-only field.

Chapter 6

Data File Management

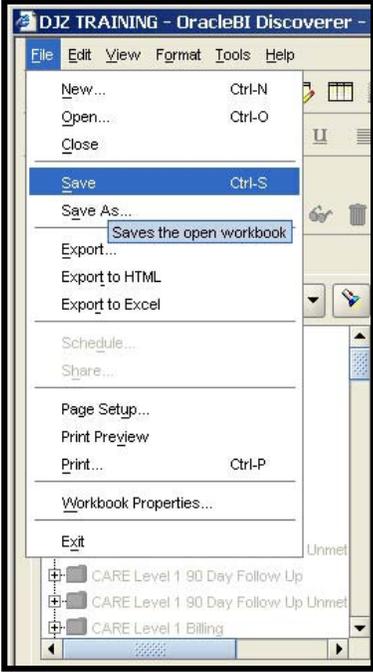
Table of Contents

Saving an Output Style Templates.....	1
Deleting Output Style Templates.....	3
Printing.....	5
Exporting.....	9

Saving an Output Style Templates

Introduction Templates are created to define your output style which determines how the results are displayed. No data results are saved with the template.

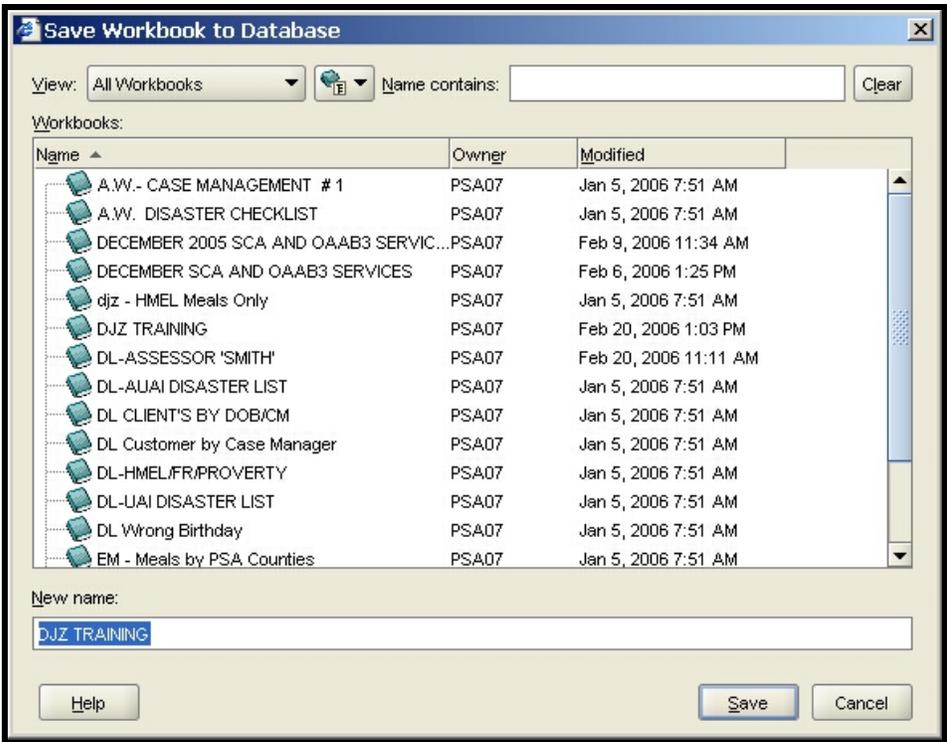
How To Follow the steps in the table below to save an output style template to the KAMIS Reports Server.

Step	Action	Result
1.	Create the output style template	
2.	Click on File on the menu bar	Menu options expand
 <p>The screenshot shows the OracleBI Discoverer application window titled 'DJ2 TRAINING - OracleBI Discoverer'. The 'File' menu is open, displaying options such as 'New...', 'Open...', 'Close', 'Save' (highlighted with a tooltip that says 'Saves the open workbook'), 'Save As...', 'Export...', 'Export to HTML', 'Export to Excel', 'Schedule...', 'Share...', 'Page Setup...', 'Print Preview', 'Print...' (with Ctrl-P shortcut), 'Workbook Properties...', and 'Exit'. The background shows a grid of data with columns like 'CARE Level 1 90 Day Follow Up' and 'CARE Level 1 Billing'.</p>		
3.	Click on Save	Save Workbook to Database dialog box will be displayed.

Continued on next page

Saving an Output Style Templates, Continued

How To (continued)

Step	Action	Result
		
4.	Enter Name of the workbook	Workbook names should be unique.

NOTE: All workbooks are saved on the KAMIS Reports Server under the Organization category. Therefore, all users associated with the Organization have access to the workbooks.

Recommendation: Include the creators' initials in the name of the workbook. This will act as an identifier to all users of the Organization as to who created the workbook.

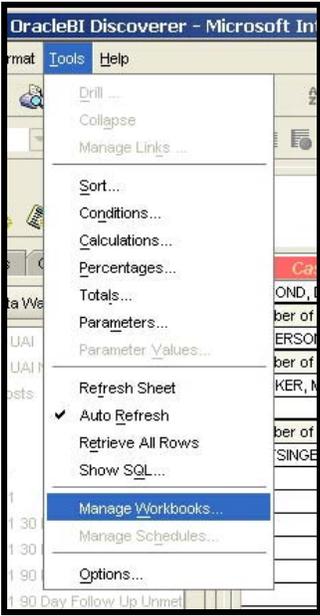
Example: DJZ Case Manager

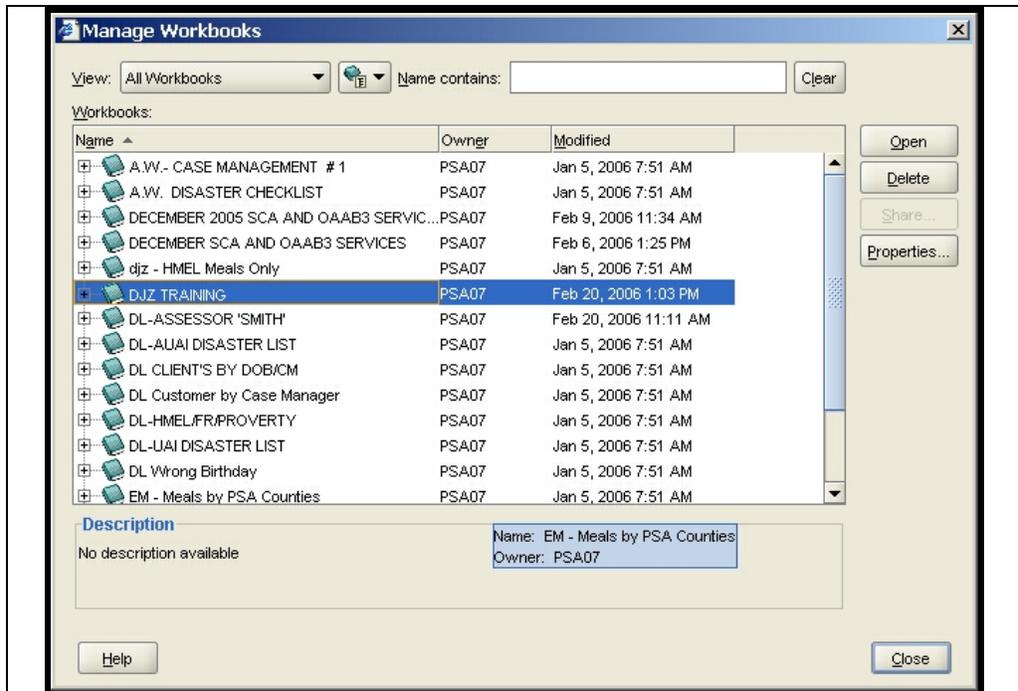
5.	Click on the Save button	Workbook is saved to the KAMIS Reports Server.
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Deleting Output Style Templates

Introduction Once an output style template is saved on the KAMIS Report Server, it can be deleted by any user associated with the Organization.

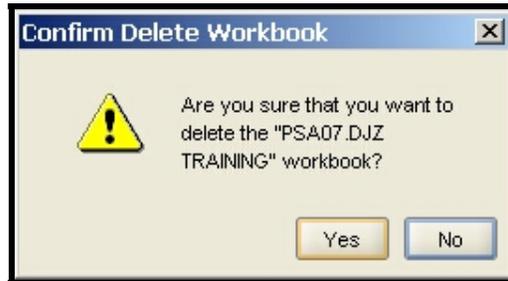
How To Follow the steps in the table below to delete an output style template from the KAMIS Reports Server.

Step	Action	Result
1.	Click on Tools on the menu bar	Menu options expand.
 <p>The screenshot shows the OracleBI Discoverer application window with the 'Tools' menu open. The menu items include: Drill..., Collapse, Manage Links..., Sort..., Conditions..., Calculations..., Percentages..., Totals..., Parameters..., Parameter Values..., Refresh Sheet, Auto Refresh (checked), Retrieve All Rows, Show SQL..., Manage Workbooks... (highlighted), Manage Schedules..., and Options... The 'Manage Workbooks...' option is highlighted in blue.</p>		
2.	Click on Manage Workbooks	Manage Workbooks window will be displayed.



3. Click the **Delete** button

Deletion Confirmation dialog box is displayed.



4. Click on **Yes**

Workbook is deleted.

Printing

Introduction

There are two options when printing from the results window.

- **Button Bar Print Icon:** Prints the results window data directly
- **Menu Bar – File – Print:** Accesses a print Wizard.

Important

KAMIS Ad hoc Queries is a web based program, the options for printing only selected pages is not valid. The program sees the Results window as one page, it is only an option to view a select number of the data rows at a time.

How to print direct

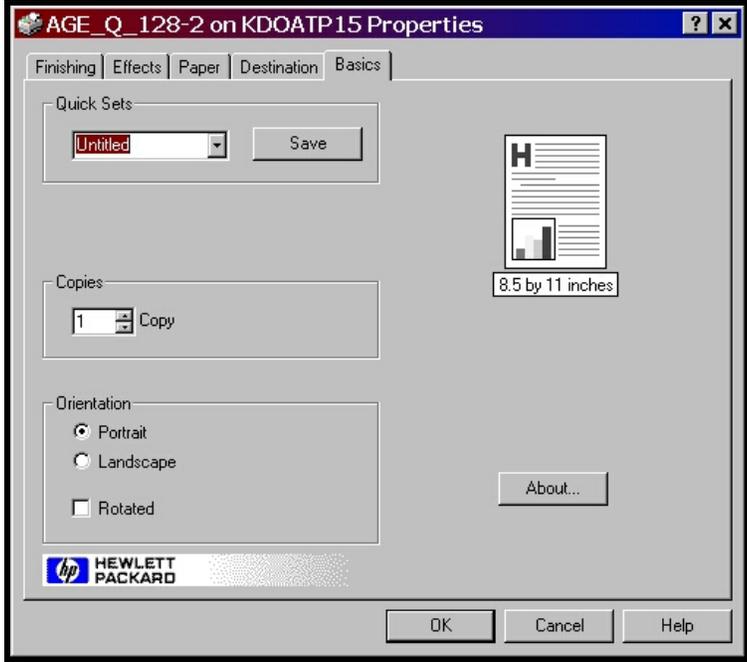
Follow the steps in the table below to directly print the data from the Queries Results window.

Step	Action	Result
1.	Click on the Print icon button on the button bar.	Print dialog box will be displayed.

Continued on next page

Printing, Continued

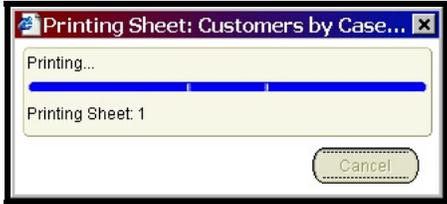
How to print direct (continued)

Step	Action	Result
2.	Click on the Properties button on the print dialog box	Properties box will be displayed.
		
3.	Select the desired Orientation – Portrait or Landscape.	Orientation will change accordingly
4.	Click on the OK button	Properties dialog box will close and the Print dialog box will be displayed.

Continued on next page

Printing, Continued

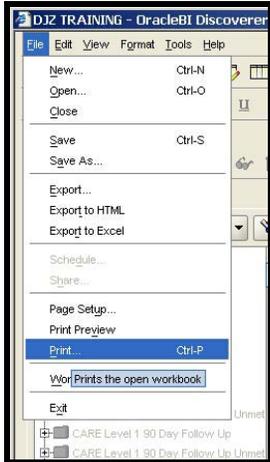
How to print direct (continued)

Step	Action	Result
5.	Click on the OK button	Printing will start to process.
		

NOTE: The above dialog boxes will differ according to the installed printer.

How to use the Print Menu Bar

Follow the steps in the table below to use the print wizard to print the data from the Query.

Step	Action	Result
1.	Click on File on the menu bar	Menu options expand
		
	Click on Print	Print dialog box will be displayed.

Continued on next page

Printing, Continued

How to use the Print Menu Bar (continued)

Select What to Print:

Entire Workbook: The workbook will be printed.

Current Worksheet: The active worksheet will be printed.

Page Items to Print:
Current Selections: If using Page Items it will print only the selection on the screen.

All Combinations: Will print all data

Step	Action	Result
2.	Click on the Finish button.	Print dialog box will be displayed.

NOTE: The above dialog boxes will differ according to the installed printer.

Exporting

Introduction The Discoverer Program has the capability of exporting the data into different formats. This enables the data to be used in other applications to further analyze or display the data.

Important Oracle Discoverer Program will only export to the following file formats:

- Microsoft Excel
 - HTML
 - Text (Tab delimited)
 - CSV (Comma delimited)
 - Formatted Text (Space delimited)
 - Oracle Reports
 - DCS (Express Format)
 - DIF (Data Interchange Format)
 - SYLK (Symbolic Link)
 - WKS (Lotus 1-2-3)
-

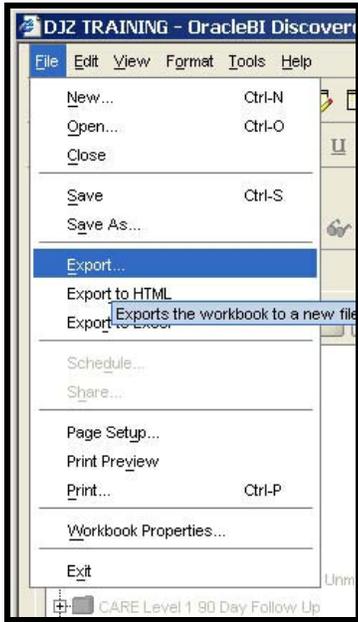
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Exporting, Continued

How to

Follow the steps in the table below to export data to a selected file format. These instructions are using Excel as an example.

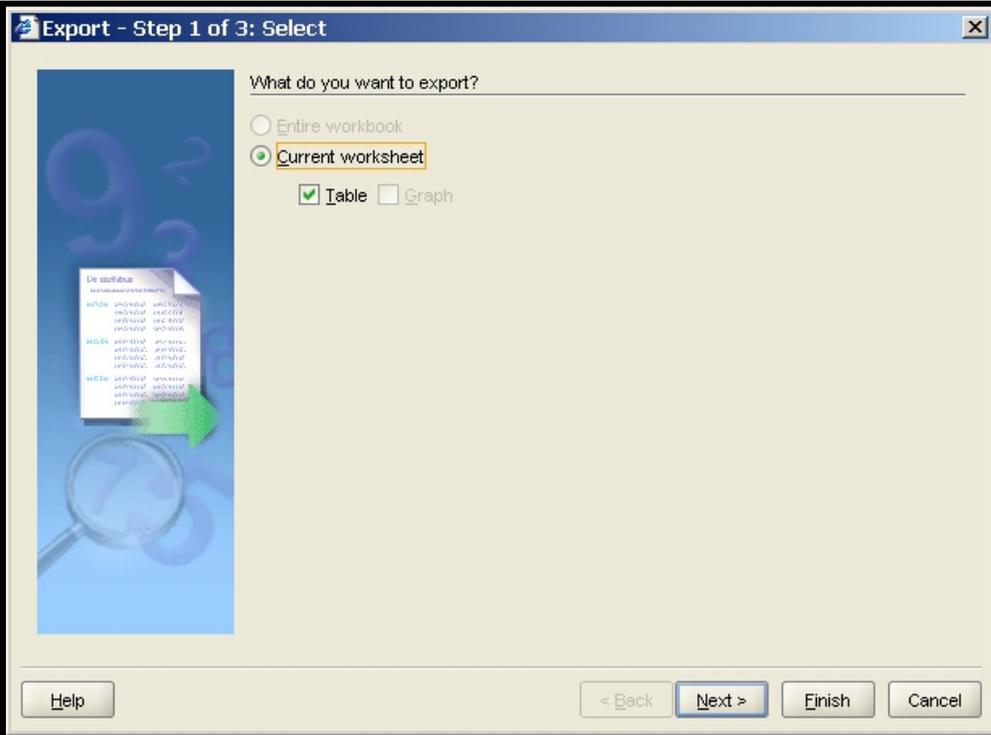
Step	Action	Result
1.	Click on File on the Menu bar	Menu options expand.

A screenshot of the 'File' menu in OracleBI Discoverer. The menu is open, showing options such as 'New...', 'Open...', 'Close', 'Save', 'Save As...', 'Export...', 'Export to HTML', 'Export to Excel', 'Schedule...', 'Share...', 'Page Setup...', 'Print Preview', 'Print...', 'Workbook Properties...', and 'Exit'. The 'Export...' option is highlighted in blue. A tooltip is visible over the 'Export to HTML' option, stating 'Exports the workbook to a new file'. The window title bar reads 'DJZ TRAINING - OracleBI Discoverer'.

Continued on next page

Exporting, Continued

How to (continued)

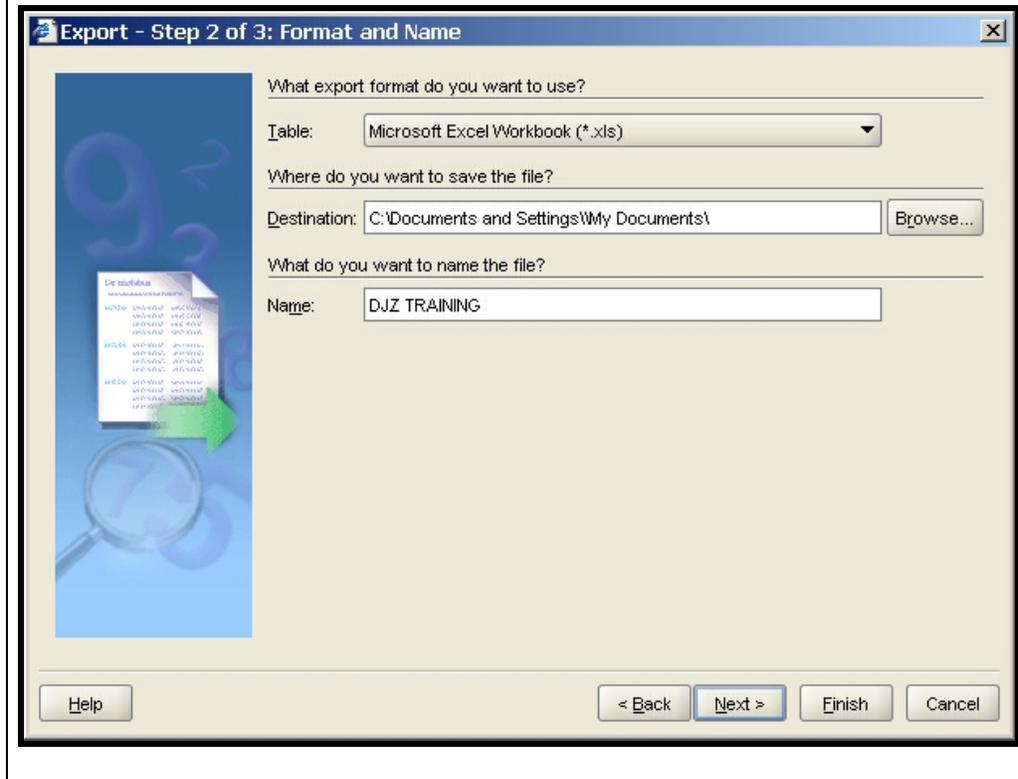
Step	Action	Result						
2.	Click on Export	The Export Wizard dialog box will be displayed.						
								
3.	Which worksheets do you want to export?	According on the Workbook, some options may be unavailable.						
	<table border="1"> <thead> <tr> <th>Option</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Current Worksheet</td> <td>The active worksheet will be exported. This is the default selection.</td> </tr> <tr> <td>Entire Worksheets</td> <td>All worksheets in the workbook will be exported.</td> </tr> </tbody> </table>	Option	Action	Current Worksheet	The active worksheet will be exported. This is the default selection.	Entire Worksheets	All worksheets in the workbook will be exported.	
Option	Action							
Current Worksheet	The active worksheet will be exported. This is the default selection.							
Entire Worksheets	All worksheets in the workbook will be exported.							
4.	Click on Next button	Will forward to Step 2 of the Export Wizard.						

Continued on next page

Exporting, Continued

How to (continued)

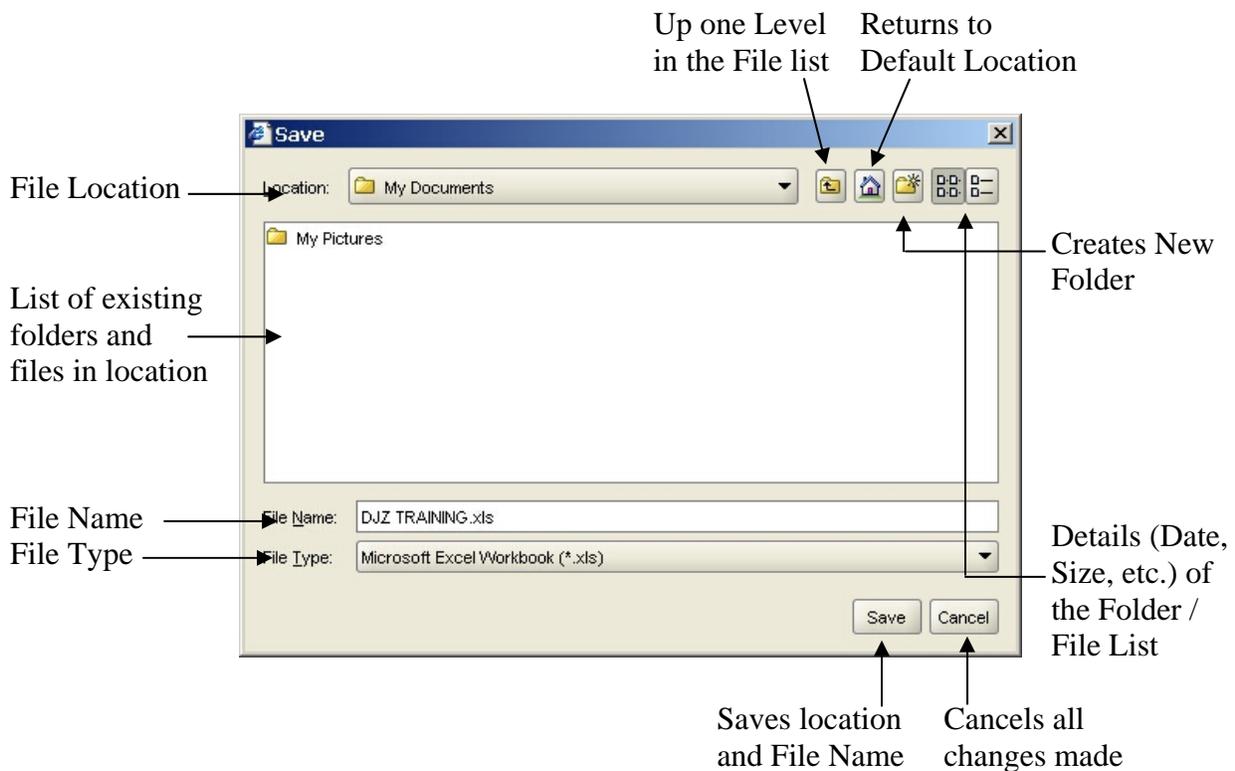
Step	Action	Result
5.	What export format do you want to use?	Select the option from the drop down dialog box.
	Where do you want to save the file?	The default is the Windows User Profile folder. This will differ according to the version of Windows.
6.	Click on the Browse button.	A Save dialog box will be displayed. This will allow the save location to be changed.



Continued on next page

Exporting, Continued

Save dialog box options The following are the components to the save dialog box.

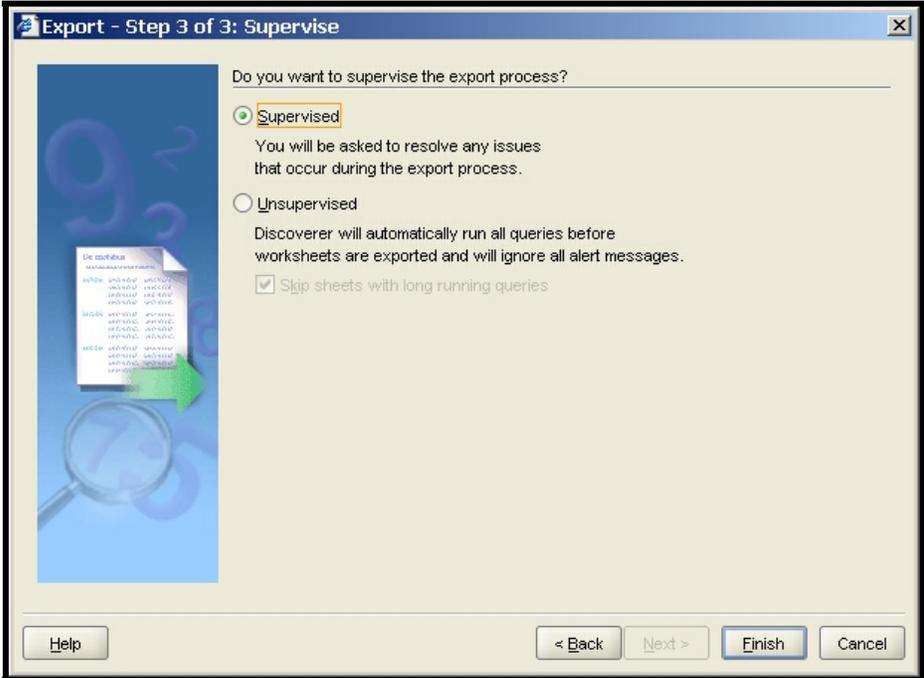


How to The steps below are a continuation of the export instructions.

Step	Action	Result
1.	Select the Location	Drop down dialog box will be displayed
2.	Enter the File Name	Once a new location is selected, the default name of the file changes to the location name.
3.	Click on the Save button.	The save location and file name is updated. The Export Wizard window is displayed.
4.	Click on Next button	Will forward to Step 3 of the Export Wizard.

Exporting, Continued

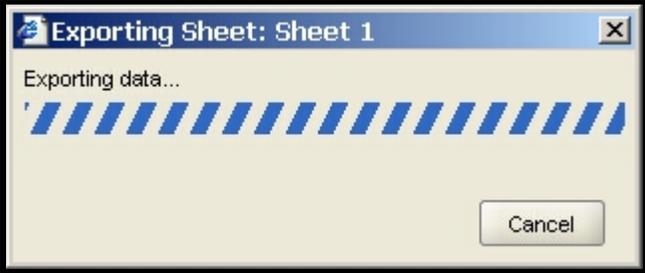
How to (continued)

Step	Action	Result						
1.	Do you want to supervise the export process?	Two options are displayed.						
								
<table border="1"> <thead> <tr> <th data-bbox="566 1356 979 1392">Option</th> <th data-bbox="979 1356 1386 1392">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="566 1392 979 1541">Supervised</td> <td data-bbox="979 1392 1386 1541">This is the default select. If an error occurs during exporting, a dialog box will be displayed stating the error.</td> </tr> <tr> <td data-bbox="566 1541 979 1654">Unsupervised</td> <td data-bbox="979 1541 1386 1654">Exporting will occur, regardless of the errors encountered.</td> </tr> </tbody> </table>			Option	Action	Supervised	This is the default select. If an error occurs during exporting, a dialog box will be displayed stating the error.	Unsupervised	Exporting will occur, regardless of the errors encountered.
Option	Action							
Supervised	This is the default select. If an error occurs during exporting, a dialog box will be displayed stating the error.							
Unsupervised	Exporting will occur, regardless of the errors encountered.							

Continued on next page

Exporting, Continued

How to (continued)

Step	Action	Result
2.	Click on the Finish button	Query will process again with a status bar will be displayed
		
3.	Export Log will state the location of the file, the name and the status of the export.	
		
4.	Click the OK button	Export Log will close.

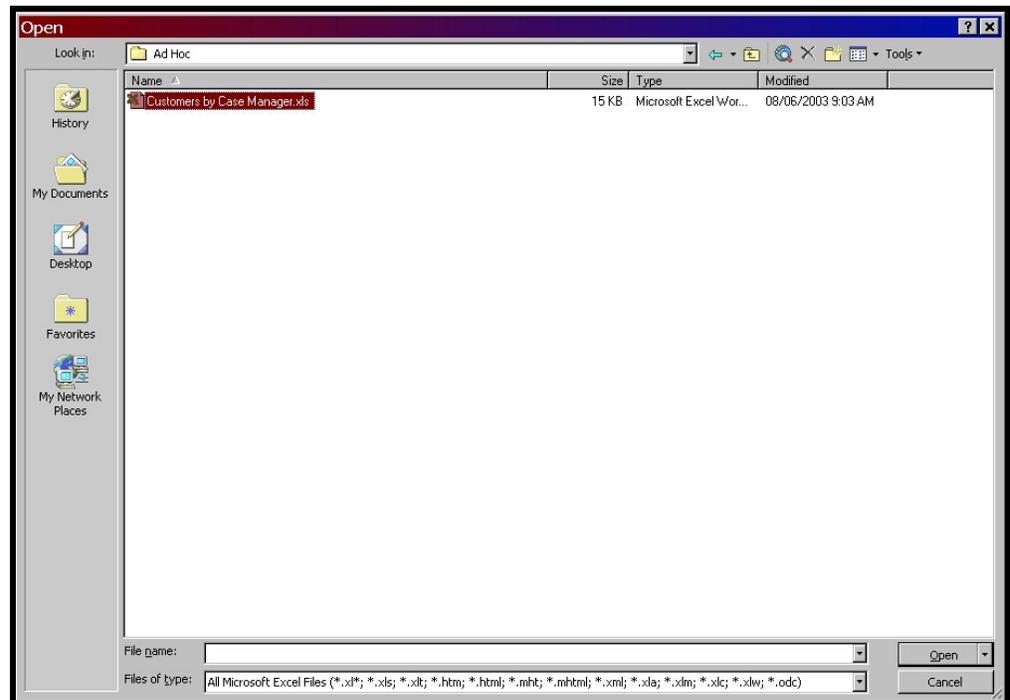
Continued on next page

Exporting, Continued

Accessing Exported File

Once the export is complete the file may be accessed through the application that supports the file format the data was exported in. In these instructions the file format that was used with Microsoft Excel (.xls).

Step	Action	Result
1.	Open the Application	Application will become active.
2.	Click on File on the Menu bar then trace to Open or Click on the Open Icon on the Button bar.	Open dialog box will be displayed



3.	Locate and click on the file name.	File is highlighted.
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Continued on next page

Exporting, Continued

Accessing Exported File (continued)

Step	Action	Result
4.	Click on the Open button.	File is opened in the application.

The screenshot shows a Microsoft Excel window titled "Microsoft Excel - Customers by Case Manager.xls". The spreadsheet has the following data:

	A	B	C	D	E
	Case Manager Last Name	Case Manager First Name	Customer Full Name	Customer Address Line	Customer
1					
2	SMITH	JOSEPHINE	CUSTOMER NAME	123 STREET ADDRESS	OSAWATO
3	SMITH	JOSEPHINE	CUSTOMER NAME	124 STREET ADDRESS	PAOLA
4	SMITH	JOSEPHINE	CUSTOMER NAME	125 STREET ADDRESS	LOUISBURG
5	SMITH	JOSEPHINE	CUSTOMER NAME	126 STREET ADDRESS	LOUISBURG
6	SMITH	JOSEPHINE	CUSTOMER NAME	127 STREET ADDRESS	PAOLA
7	SMITH	JOSEPHINE	CUSTOMER NAME	128 STREET ADDRESS	LOUISBURG
8	SMITH	JOSEPHINE	CUSTOMER NAME	129 STREET ADDRESS	OSAWATO
9	SMITH	JOSEPHINE	CUSTOMER NAME	130 STREET ADDRESS	OSAWATO
10	SMITH	JOSEPHINE	CUSTOMER NAME	131 STREET ADDRESS	PAOLA
11	SMITH	JOSEPHINE	CUSTOMER NAME	132 STREET ADDRESS	OSAWATO
12	SMITH	JOSEPHINE	CUSTOMER NAME	133 STREET ADDRESS	PAOLA
13	SMITH	JOSEPHINE	CUSTOMER NAME	134 STREET ADDRESS	LOUISBURG
14	SMITH	JOSEPHINE	CUSTOMER NAME	135 STREET ADDRESS	OSAWATO
15	SMITH	JOSEPHINE	CUSTOMER NAME	136 STREET ADDRESS	PAOLA
16	SMITH	JOSEPHINE	CUSTOMER NAME	137 STREET ADDRESS	OSAWATO
17	SMITH	JOSEPHINE	CUSTOMER NAME	138 STREET ADDRESS	OSAWATO
18	SMITH	JOSEPHINE	CUSTOMER NAME	139 STREET ADDRESS	LOUISBURG
19	SMITH	JOSEPHINE	CUSTOMER NAME	140 STREET ADDRESS	OSAWATO
20	SMITH	JOSEPHINE	CUSTOMER NAME	141 STREET ADDRESS	PAOLA
21	SMITH	JOSEPHINE	CUSTOMER NAME	142 STREET ADDRESS	PAOLA
22	SMITH	JOSEPHINE	CUSTOMER NAME	143 STREET ADDRESS	OSAWATO
23	SMITH	JOSEPHINE	CUSTOMER NAME	144 STREET ADDRESS	PAOLA
24	SMITH	JOSEPHINE	CUSTOMER NAME	145 STREET ADDRESS	OSAWATO
25	SMITH	JOSEPHINE	CUSTOMER NAME	146 STREET ADDRESS	LOUISBURG
26	SMITH	JOSEPHINE	CUSTOMER NAME	147 STREET ADDRESS	PAOLA
27	SMITH	JOSEPHINE	CUSTOMER NAME	202 S. ROGERS ROAD	LOUISBURG

Chapter 7

Information Messages

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Information Messages

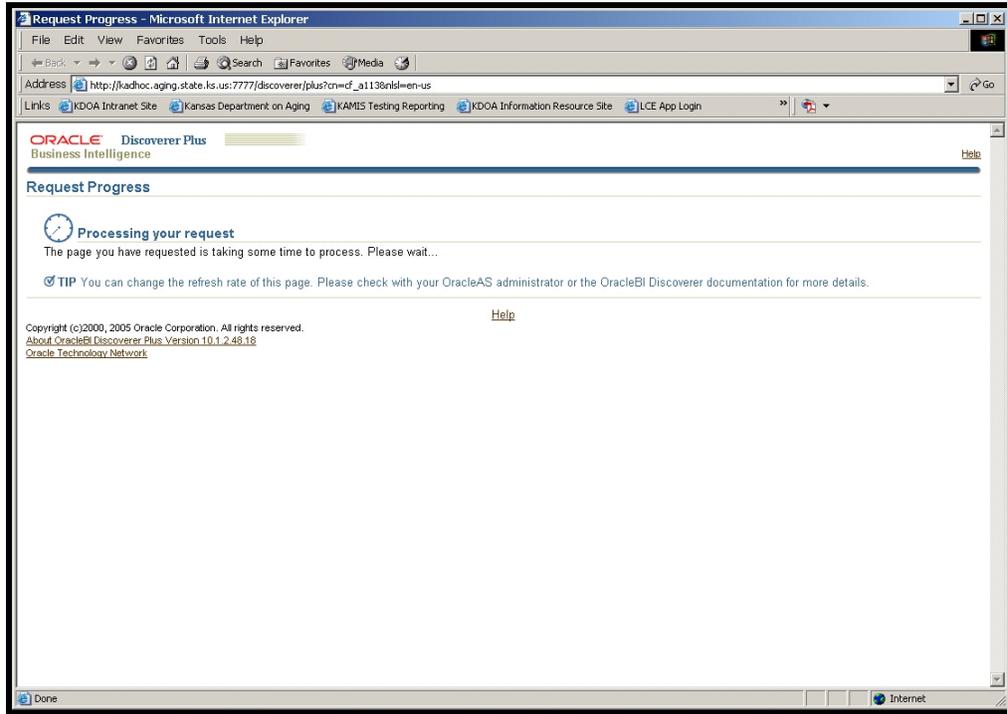
Introduction

If any of the following informational dialog boxes are displayed, please contact the KDOA Helpdesk as soon as possible.

Processing Notice

This notice may appear if the connection to KAMIS AdHoc Servers is slow.

No action is needed other than to wait for the connection to complete.



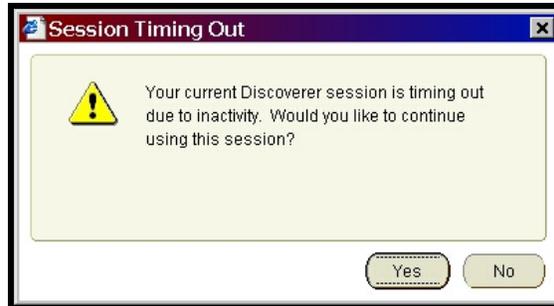
Unable to Connect to Server



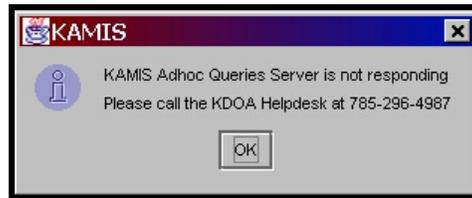
Continued on next page

Information Messages, Continued

Session Timed Out



Server Not Responding



Access Rights

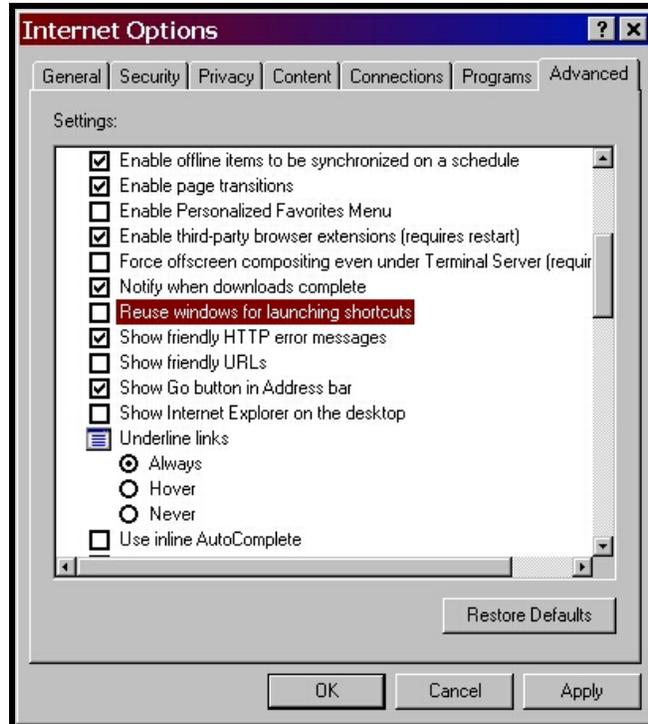


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Information Messages, Continued

Only One Internet Browser Window can be Open at a Time.

Set Internet Options not to reuse windows for launching shortcuts.



Click on the following to set the options:

1. **Tools** on the Menu Bar
 2. **Internet Options**
 3. **Advanced** Tab
 4. **Uncheck** “Reuse windows for launching shortcuts”
-