



EASTERN
WASHINGTON UNIVERSITY

**Discoverer Viewer –
HR/Payroll Reports
User's Guide**

Revised December 2010

Banner

Discoverer Viewer - HR/Payroll Reports User's Guide

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Welcome to the Discoverer Viewer

Welcome to the *Discoverer Viewer HR/Payroll Reports User's Guide*. This guide is designed to provide you with the information you need to successfully navigate and use HR and Payroll queries and reports using the Discoverer Viewer tool and includes the following topics:

- **Accessing Discoverer Viewer**
- **Payroll Reports**
- **Running Reports**
- **Downloading Reports to Excel**

Who Do I Contact For Help?

For assistance with the data displayed Discoverer Viewer, contact the applicable functional area. For technical assistance, contact the Office of Information Technology, 359-6690.

Banner and the Discoverer Viewer Tool

Behind the scenes in Banner an Operational Data Storage (ODS) data base houses Banner data. The Discoverer Viewer tool sits on top of the ODS and is used to easily query and access information and data. Note: Data queried in Discoverer Viewer is updated from the ODS nightly; thus data is 24 hours old.

Requesting Access

To obtain Discoverer Viewer access, complete an access authorization form located at the link listed. Complete the HR/Payroll section of the *ODS Access Request* form.

<http://access.ewu.edu/Academic-Advising/FacultyStaff-Advisor-Support/EWU-Student-Information-Systems-Access/Oracle-Discoverer-Viewer.xml>

Additionally Banner INB Finance access may be required for other reports. Visit the Banner Help web site for Finance access information and the access request form.

<http://access.ewu.edu/OIT/Services/IT-Training/Banner-Help.xml>

Important Note: If you currently *do not* have Banner INB (Banner Finance, Banner Student) access you will be provided with a user name and temporary password (via email) by the Security Administrator when your Discoverer Viewer access is granted. *Banner INB and Discoverer Viewer share the same user names and passwords.* It will be necessary to log into

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Banner INB with your temporary password and change it before you log into Discoverer Viewer for the first time. Instructions are listed below.

Banner Password Policy

The following are Banner password requirements:

- Access is locked after three failed login attempts. The system automatically unlocks after 30 minutes.
- Passwords expire after 120 days.
- The last 20 passwords used must be unique.
- Passwords cannot be reused within 90 days.
- Passwords must be at least eight characters long.
- Passwords must contain at least one numeric digit.
- Passwords must contain at least one of the following special characters:
! % . * + - / : ? _ Only these special characters may be used (others are not allowed).
- Characters cannot repeat more than two times (for example, "baaadpwd123_" is not allowed, but "baadpwd123_" is allowed).

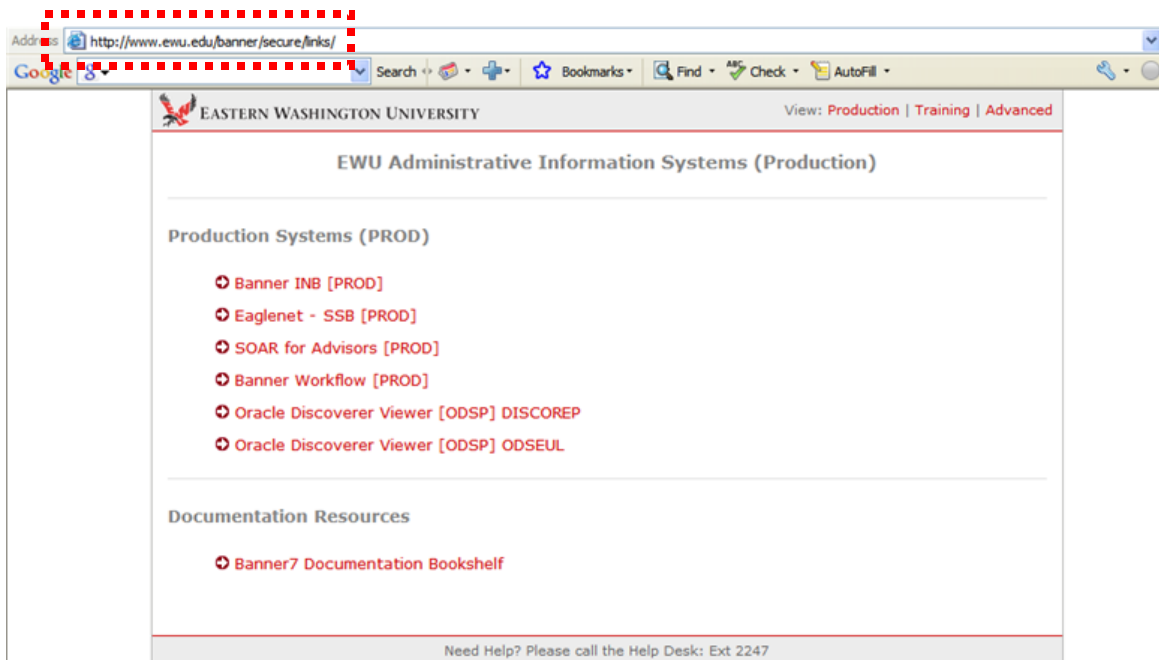
Changing Banner Passwords

The following provides instructions on changing your Banner password.

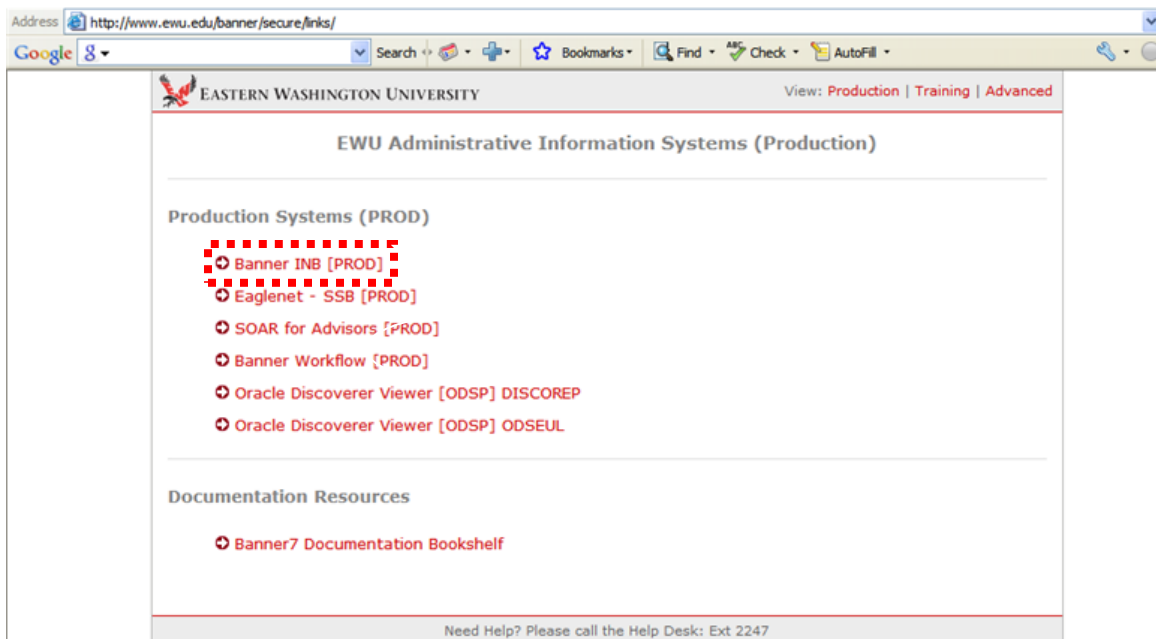
1. Launch Microsoft Internet Explorer.
 - For PCs Internet Explorer is the supported web browser.
 - For Macs use Safari or Mozilla Firefox web browsers.
2. Access the Banner web page at: <http://web.ewu.edu/banner/secure/links/>

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3. Select *Banner INB (PROD)*.

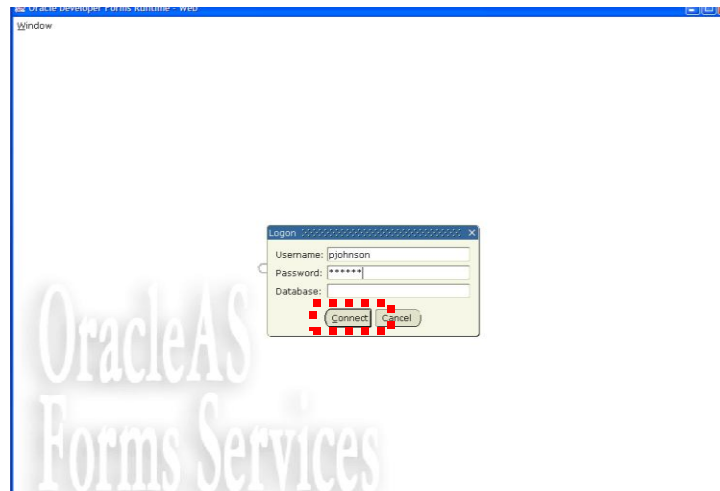


4. Enter your campus user name in the **Username** field (typically your first initial and last name; for example “*pjohnson*”).
5. Enter your temporary password in the **Password** field and click on the **Connect** button.

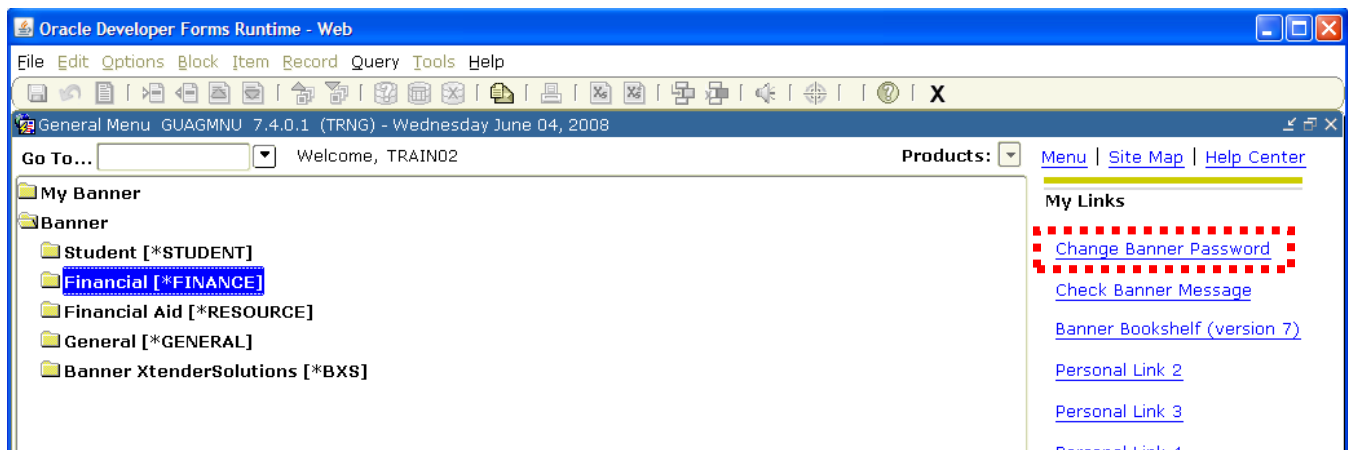
Banner

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- If you do not know your Banner password, contact the Help Desk at 359-2247.



6. From the Main Menu, click the **Change Banner Password** link.



7. The **Oracle Password Change (GUAPSWD)** form opens.

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Oracle Password Change Form GUAPSWD 7.4 (TRNG)

Oracle User ID: TRAIN02


Oracle Password:

Database:

New Oracle Password:

Verify Password:

Save X

8. In the **Oracle Password** field, type in your current/temporary password.
 - The **Database** field is not used.
9. In the **New Oracle Password** field, enter your new password.
10. In the **Verify Password** field, re-enter your new password.
11. Click the **Save** icon  to save the new password and return to the Main Menu.

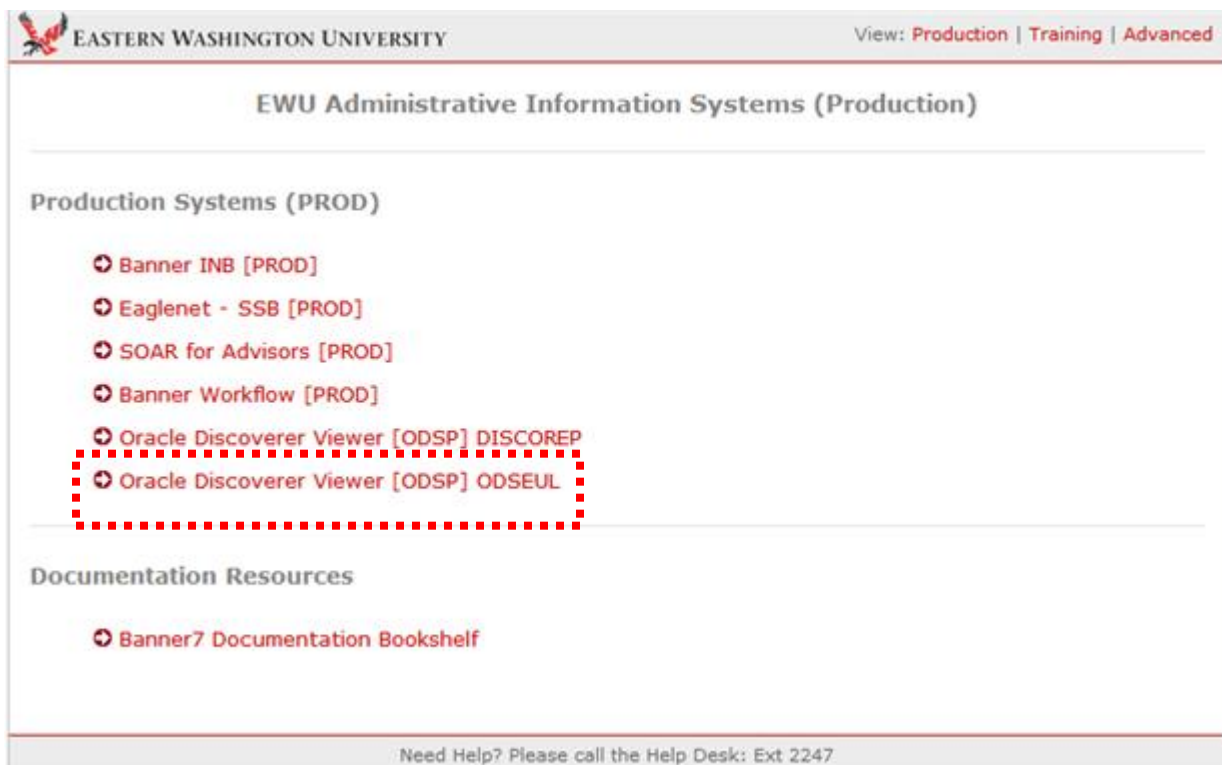
Banner

Discoverer Viewer - HR/Payroll Reports User's Guide

Logging Into Discoverer Viewer

The following provides instructions on accessing Discoverer Viewer.

1. Launch Microsoft Internet Explorer.
 - For PCs Internet Explorer is the supported web browser.
 - For Macs use Safari or Mozilla Firefox web browsers.
2. Access Discoverer Viewer from the Banner Login web page
<http://web.ewu.edu/banner/secure/links/>



2. Select the **Oracle Discoverer Viewer (ODSP) ODSEUL** link to access the **Oracle Discoverer** login page.

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Oracle Discoverer start something big

[Connect >](#)
Enter connection details.
Enter your connection details below to connect directly to OracleBI Discoverer.
* Indicates required field.

Connect To: OracleBI Discoverer
User Name:
Password:
Database: ODSR
End User Layer: ODSEUL
Locale: Locale retrieved from browser

[Help](#)
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[About OracleBI Discoverer Version 10.1.2.54.25](#)
[Oracle Technology Network](#)

3. Enter the following:

- **User Name** – User name is your first initial followed by your last name (for example, dmontgomery for Denise Montgomery). User name is the same as your Banner INB user name.
- **Password** – Enter your Banner INB password. If the password is not known contact the Service Desk at 359-2247.

4. Click the keyboard **Enter** key or **Go** button.

5. The **Worksheet List** page displays. Reports are listed by name in the **Name** column.

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The screenshot shows the Oracle Discoverer interface. At the top, there is a header for Eastern Washington University with the Oracle Discoverer logo and the tagline "start something big". Below the header, there is a "Connect >" link and a "Worksheet List" section. A search bar is present with a dropdown menu set to "All Workbooks" and a "Go" button. Below the search bar, there is a "Refresh" button and "Expand All | Collapse All" links. The main content is a table with the following columns: Focus Name, Description, Owner, and Last Modified.

Focus Name	Description	Owner	Last Modified
Discoverer Workbooks			
FPAORGDA - Payroll Organization Detail Activity		JKINZEL	Wednesday, March 25, 2009 02:40:03 AM PDT
PBUPSNL - Position Detail Listing		JKINZEL	Thursday, March 26, 2009 03:20:13 AM PDT
PHRLVBAL - Leave Balance2		JKINZEL	Monday, March 23, 2009 04:44:30 AM PDT
PPASEBTP - Salary & Employer Benefit Transactions		JKINZEL	Thursday, March 12, 2009 11:43:00 PM PDT

Discoverer Viewer Reports

With the implementation of Banner Human Resources/Payroll, various payroll transactions are no longer visible in Banner INB Finance. As a result, the following reports are available using Discoverer Viewer. Additionally, new leave balance and position reports were added. These reports are used primarily by supervisors and budget and finance managers. Additional reports may be added in the future.

- **PHRLVBAL** – Leave Balance. This report provides employees annual beginning leave balance, annual ending balance (year-to-date), monthly time accrued and monthly time taken for all leave reporting codes (for example, sick, vacation, personal holiday, etc.). This report has two sections or worksheets:
 - **Leave Balances** - This worksheet provides employees leave balances.
 - **Leave Definitions** - This worksheet provides a definition of leave codes.
- **FPAORGDA** – Payroll Organization Detail Activity. This report has three sections or worksheets:
 - **Salary Transactions** – This worksheet provides employees earnings, and other salary transactions for a specified time period by organization, fund and account.
 - **Benefit Transactions** – The worksheet provides employer paid benefit transactions per employee for a specified time period by organization, fund and

account.

- **Earning Definition** – This worksheet provides a definition of earnings codes.
- **PBUPSNDL** – Position Detail Listing. Banner Finance security access is required to access this report. This report has two sections or worksheets:
 - **Single Positions** – This worksheet provides budgeted salary and benefit amounts, per position, by organization, index, and employee for positions C, E, F.
 - **Pooled Positions** – This worksheet provides budgeted salary and benefit amounts, per position, by organization, index, and employee for positions D, G, Q, X.

Note: EWU position descriptions are located at:


<http://access.ewu.edu/Documents/Budget/Position%20Number%20Descriptions%20for%20Units.pdf>

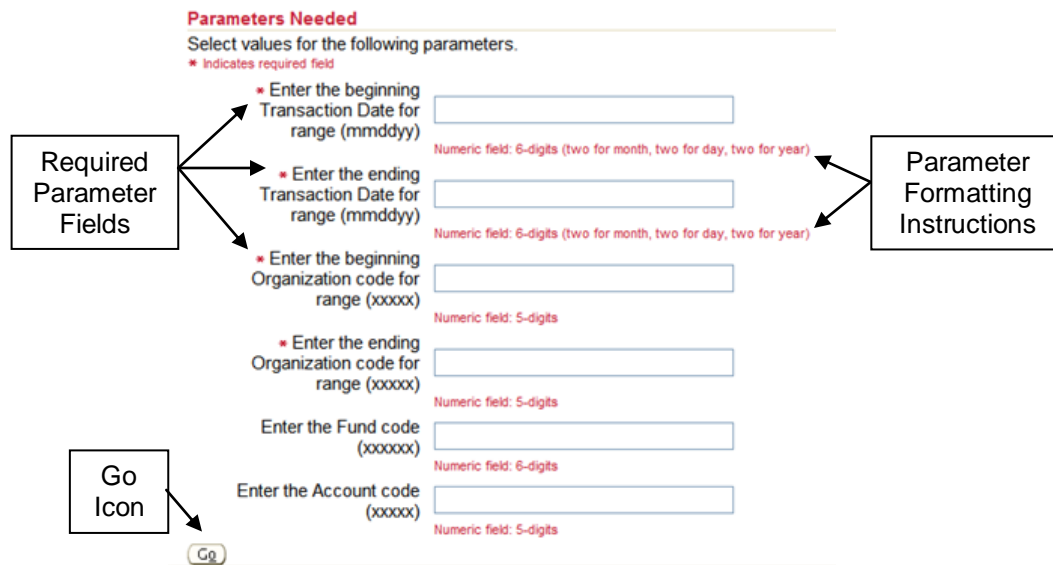
For additional information on the Finance data refer to the *Banner Finance 204 – Reports and Queries User's Guide*. The guide is located on the Banner Help site at:

<http://access.ewu.edu/OIT/Services/IT-Training/Banner-Help.xml>

Discoverer Viewer Functionality

The following section discusses *some* of the functionality of Discoverer Viewer.

- **Parameters** – Parameters or data must be entered for some queries. Parameters tell the system what data is being requested. After selecting a report if parameters are required the **Parameters Needed** page displays. Parameters may be optional or required. Required parameter fields are indicated by a **red** asterisk. If an invalid parameter value is entered, or a required field is missed, an error message may display indicating the field requiring correction. Once all parameters are entered, the **Go** button () must be selected to run the query (do not use the keyboard **Enter** key).




Parameters Needed
Select values for the following parameters.
* Indicates required field

Required Parameter Fields (annotated box) points to the first three required fields:

- * Enter the beginning Transaction Date for range (mmddy) (Numeric field: 6-digits (two for month, two for day, two for year))
- * Enter the ending Transaction Date for range (mmddy) (Numeric field: 6-digits (two for month, two for day, two for year))
- * Enter the beginning Organization code for range (xxxx) (Numeric field: 5-digits)

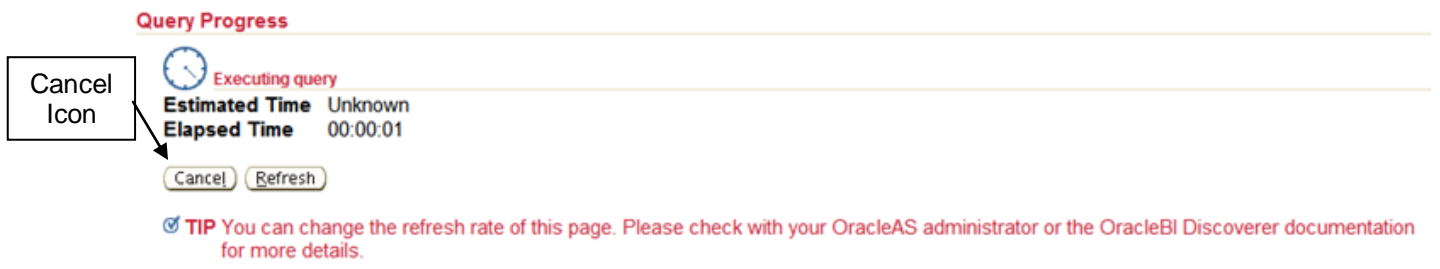
Parameter Formatting Instructions (annotated box) points to the numeric field descriptions.

Go Icon (annotated box) points to the  button at the bottom.


Other fields include:

- Enter the ending Organization code for range (xxxx) (Numeric field: 5-digits)
- Enter the Fund code (xxxxx) (Numeric field: 6-digits)
- Enter the Account code (xxxx) (Numeric field: 5-digits)


- **Query Running Time** – Once parameters are entered and submitted the **Query Progress** page displays. This page tracks the query running time and also allows the query to be cancelled. **Note:** Query running times can vary greatly. Queries with large quantities of data may require more than five minutes to process. If the query is running for an extended period of time and does not return the report, use the **Cancel** icon to cancel.





Query Progress

 Executing query

Estimated Time Unknown
Elapsed Time 00:00:01

Cancel Icon (annotated box) points to the  button.



 **TIP** You can change the refresh rate of this page. Please check with your OracleAS administrator or the OracleBI Discoverer documentation for more details.

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- **No Data Report Data Returned** – There are several reasons a report returns with no data; parameters may have been entered incorrectly, or the user does not have the appropriate security access to access the report data. Before contacting technical support to determine the appropriate security access needed for the requested report, confirm that the all parameters have been entered correctly. Reenter the parameters and resubmit the query if applicable.

Connect > Workbooks >

Information
This sheet currently contains no data.

PBUPSNDL - Position Detail Listing - Pooled Positions
Last run Thursday, April 2, 2009 12:53:43 PM PDT

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

Worksheets
Single Positions
Pooled Positions

Parameters
Select values for the following parameters.
* Indicates required field

Enter the Organization Level 1 code (xx) **Invalid Parameter**
Numeric field: 2-digits

Enter the Organization Level 2 code (xxx)
Numeric field: 3-digits

Enter the Account Index (xxxxxx)

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BUDGET DEPT
PBUPSNDL - Position Detail Listing
Fiscal Year 2010
Pooled Positions**

- **Page Items** – Reports have **Page Items** displayed above the report data. Page items vary depending on the specific report. Use the drop-down arrows to view the options available.

Page Items

Drop-Down Arrows

Table
Tools Layout Format Stoplight Sort Rows and Columns

Page Items Organization <All> 75661
71000
<All>

Org Code	Fund	Acct	ID	Posn	PR#	Seq#	Document	TransDate	Earnings	Activity	Salary Trans Amt	Hours
71000	120149	63100	4819	C99401	1	0	F0010020	01/09/2009	REG	-	566.50	-
											Acnt Total:	566.50
											Fund Total:	566.50

- **Scroll Bars** – Depending on the amount of data returned and the amount of data displayed, scroll bars (vertical and horizontal) may be used to view additional data on the report.

Banner

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- **Multiple Worksheets** – Some reports contain multiple worksheets (similar to Excel work sheets). Worksheets display on both the **Worksheet List** page and when the query is run. To access the desired worksheet, click on the desired link in the **Worksheets** section of the page. The worksheet will return with the same parameters previously entered, however they may be changed before clicking **Go**.

FPAORGDA - Payroll Organization Detail Activity - Salary Transactions
Last run Thursday, April 2, 2009 01:26:40 PM PDT

EASTERN WASHINGTON UNIVERSITY
Payroll Organization Detail Activity - Salary Transactions
Beginning Transaction Date : '010109' - Ending Transaction Date : '011709'
Beginning Organization Code : '71000' - Ending Organization Code : '71000'


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

Worksheets
[Salary Transactions*](#)
[Benefit Transactions](#)
[Earnings Definition](#)

Parameters
Select values for the following parameters.
* indicates required field

- * Enter the beginning Transaction Date for range (mmddy)
Numeric field: 6-digits (two for month, two for day, two for year)
- * Enter the ending Transaction Date for range (mmddy)
Numeric field: 6-digits (two for month, two for day, two for year)
- * Enter the beginning Organization code for range (xxxxx)

- **Breadcrumbs** – Breadcrumbs are a navigation tool that displays the pages previously accessed and provides a link back to that page or report.

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Oracle Di start something **big**

[Connect](#) > [Workbooks](#) >

Accessing Reports

The following provides instructions on accessing HR/Payroll reports.

PHRLVBAL – Leave Balance

1. From the **Worksheet List** page, click on the red pointer icon next to the report name (**PHRLVBAL – Leave Balance**) to display applicable report tabs (**Leave Balance**, **Leave Definitions**).

[Connect >](#)

Worksheet List

Search

Type in a search string to find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.

Search

Result List

[Expand All](#) | [Collapse All](#)

Focus Name	Description	Owner	Last Modified
Discoverer Workbooks			
<input type="button" value="⊕"/> <input type="button" value="▶"/> FPAORGDA - Payroll Organization Detail Activity		LIBMGR_HR	Thursday, April 2, 2009 04:57:59 AM PDT
<input type="button" value="⊕"/> <input type="button" value="▶"/> PBUPSNDL - Position Detail Listing		LIBMGR_HR	Tuesday, March 31, 2009 11:24:42 PM PDT
<input type="button" value="⊕"/> <input type="button" value="▶"/> PHRLVBAL - Leave Balance		LIBMGR_HR	Thursday, April 2, 2009 12:05:52 AM PDT
<input type="button" value="▶"/> Leave Balance			
<input type="button" value="▶"/> Leave Definitions			
<input type="button" value="⊕"/> <input type="button" value="▶"/> PPASEBTP - Salary & Employer Benefit Transactions		JKINZEL	Thursday, March 12, 2009 11:43:00 PM PDT

2. Select **Leave Balance**. The **Parameters Needed** page displays. Enter your EWU ID in the **Supervisor's employee ID** field and click the **Go** button.
 - Only individuals with applicable security access may view this report.

Banner

Discoverer Viewer - HR/Payroll Reports User's Guide

Connect > Workbooks >
PHRLVBAL - Leave Balance2 - Sheet 1
Last run Thursday, March 26, 2009 10:51:39 AM PDT

Worksheets
Sheet 1
Sheet 2

Parameters Needed
Select values for the following parameters.
* Indicates required field

Enter the Supervisor's employee ID (xxxxxxxx)
Numeric field: 8-digits

Preferences | Exit | Help

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[Oracle Technology Network](#)

- The **Query Progress** page displays. This page displays the time it takes to execute the query. If the query is taking too long to execute, click the **Cancel** button.

Sheet 1

Query Progress



Executing query

Estimated Time Unknown

Elapsed Time 00:00:01

TIP You can change the refresh rate of this page. Please check with your OracleAS administrator or the OracleBI Discoverer documentation for more details.

[Help](#)

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- The **Leave Balance** report data displays.
- To view different months leave data, click the **Month** drop down list in the **Page Items** and select the desired month.

Page Items Supervisor Name Home Organization Description Month

Banner

Discoverer Viewer - HR/Payroll Reports User's Guide

6. To view **Leave Definitions** from the open **Leave Balance** report, click the **Leave Definitions** link in Worksheets window. Click the **Go** button to execute.

- The **Query Progress** page displays.

Connect > Workbooks >
PHRLVBAL - Leave Balance - Leave Balance
Last run Monday, April 6, 2009 02:10:45 PM PDT

Worksheets
Leave Balance
Leave Definitions

Parameters Needed
Select values for the following parameters.
* Indicates required field

* Enter the Supervisor's employee ID (xxxxxxx)
00114248
Numeric field: 8-digits

Go

7. The **Leave Definitions** report data displays. Note: **SCKN** represents shared leave.

PHRLVBAL - Leave Balance - Leave Definitions
Last run Thursday, April 16, 2009 01:01:37 PM PDT

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

Worksheets
[Leave Balance](#)
[Leave Definitions](#)

Table
Tools [Layout](#) [Sort](#) [Rows and Columns](#)

Leave	Leave Description
COMP	Compensatory Time
PERH	Personal Holiday
SCKN	Sick Leave - Non Compensable
SICK	Sick Leave - Compensable
VACA	Vacation

FPAORGDA – Payroll Organization Detail Activity

1. From the **Worksheet List** page, click on the red pointer icon next to the report name (**FPAORGDA – Payroll Organization Detail Activity**) to display applicable report tabs (**Salary Transactions**, **Benefit Transactions**).

Worksheet List

Search

Type in a search string to find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.

Search

Result List

[Expand All](#) | [Collapse All](#)

⊕

Focus Name	Description	Owner	Last Modified
▼ Discoverer Workbooks			
⊕ ▼ FPAORGDA - Payroll Organization Detail Activity		LIBMGR_HR	Wednesday, April 1, 2009 05:28:27 AM PDT
Salary Transactions			
Benefit Transactions			
Earnings Definition			
⊕ ▼ PBUPSNDL - Position Detail Listing		LIBMGR_HR	Tuesday, March 31, 2009 11:24:42 PM PDT
⊕ ▼ PHRLVBAL - Leave Balance		LIBMGR_HR	Thursday, April 2, 2009 12:05:52 AM PDT
⊕ ▼ PPASEBTP - Salary & Employer Benefit Transactions		JKINZEL	Thursday, March 12, 2009 11:43:00 PM PDT

2. Select **Salary Transactions**. The **Parameters Needed** page displays.
 - Only individuals with applicable security access may view this report.
3. Enter the applicable values in the **Parameter Needed** section of the form and click the **Go** button.
 - Beginning and ending dates are required as well as a beginning and ending organization code.

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FPAORGDA - Payroll Organization Detail Activity - Salary Transactions

Last run Thursday, March 26, 2009 11:15:59 AM PDT

Worksheets

Salary Transactions
Benefit Transactions

Parameters Needed

Select values for the following parameters.

* Indicates required field

* Enter the beginning
Transaction Date for
range (mmddyy)

Numeric field: 6-digits (two for month, two for day, two for year)

* Enter the ending
Transaction Date for
range (mmddyy)

Numeric field: 6-digits (two for month, two for day, two for year)

* Enter the beginning
Organization code for
range (xxxxx)

Numeric field: 5-digits

* Enter the ending
Organization code for
range (xxxxx)

Numeric field: 5-digits

Enter the Fund code
(xxxxxx)

Numeric field: 6-digits

Enter the Account code
(xxxxx)

Numeric field: 5-digits



- The **Query Progress** page displays. This page displays the time it takes to execute the query. If the query is taking too long to execute, click the **Cancel** button.

Salary Transactions

Query Progress



Executing query

Estimated Time Unknown

Elapsed Time 00:00:04

TIP You can change the refresh rate of this page. Please check with your OracleAS administrator or the OracleBI Discoverer documentation for more details.

[Help](#)

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- The salary transactions report data displays.

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- To view **Benefit Transactions** from the open **Salary Transactions** report, click the **Benefit Transactions** link in **Worksheets** window. Click the **Go** button.
 - The report will run with the same parameters entered for salary transactions. If desired, the parameters may be changed before selecting the **Go** button.

Connect > Workbooks >

FPAORGDA - Payroll Organization Detail Activity - Salary Transactions

Last run Monday, April 6, 2009 02:56:19 PM PDT

Actions

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

Worksheets

- Salary Transactions
- Benefit Transactions**
- Earnings Definition

EASTERN WASHINGTON UNIV
Payroll Organization Detail Activity - Sal
Beginning Transaction Date : '010109' - Ending 1
Beginning Organization Code : '71000' - Ending C

Parameters

Select values for the following parameters.

* Indicates required field

- * Enter the beginning Transaction Date for range (mmddy)
Numeric field: 6-digits (two for month, two for day, two for year)
- * Enter the ending Transaction Date for range (mmddy)
Numeric field: 6-digits (two for month, two for day, two for year)
- * Enter the beginning Organization code for

- The **Benefits Transaction** report data displays.

PBUPSNDL – Position Detail Listing

1. From the **Worksheet List** page, click on the red pointer icon next to the report name (**PBUPSNDL – Position Detail Listing**) to display applicable report tabs (**Salary Positions, Pooled Positions**).

Worksheet List

Search

Type in a search string to find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.

Search

Result List

Focus	Name	Description	Owner	Last Modified
▼	Discoverer Workbooks			
⊕	▶ FPAORGDA - Payroll Organization Detail Activity		JKINZEL	Wednesday, March 25, 2009 02:40:03 AM PDT
⊕	▶ PBUPSNDL - Position Detail Listing		JKINZEL	Thursday, March 26, 2009 03:40:50 AM PDT
	Single Positions			
	Pooled Positions			
⊕	▶ PHRLVBAL - Leave Balance2		JKINZEL	Monday, March 23, 2009 04:44:30 AM PDT
⊕	▶ PPASEBTP - Salary & Employer Benefit Transactions		JKINZEL	Thursday, March 12, 2009 11:43:00 PM PDT

[Preferences](#) | [Exit](#) | [Help](#)

2. Select **Salary Positions**. The **Parameters Needed** page displays.
3. Enter the applicable values in the **Parameter Values** section of the page and click the **Go** button.
 - Enter the 5-digit organization code rather than the organization level parameters.

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Discoverer Viewer - HR/Payroll Reports User's Guide

[Connect](#) > [Workbooks](#) >

PBUPSNDL - Position Detail Listing - Single Positions

Last run Monday, April 6, 2009 03:20:57 PM PDT

Worksheets

Single Positions
[Pooled Positions](#)

Parameters Needed

Select values for the following parameters.

* Indicates required field

Enter the
Organization Level
1 code (xx)
Numeric field: 2-digits

Enter the
Organization Level
2 code (xxx)
Numeric field: 3-digits

Enter the Account
Index (xxxxxx)
Numeric field: 6-digits

Enter the Fund
Code (xxxxxx)
Numeric field: 6-digits

Enter the
Organization Code
(xxxxx)
Numeric field: 5-digits

Enter the Program
Code (xxxxx)
Numeric field: 5-digits

- The **Query Progress** page displays. This page displays the time it takes to execute the query. If the query is taking too long to execute, click the **Cancel** button.

Single Positions

Query Progress



Executing query

Estimated Time Unknown

Elapsed Time 00:00:01

TIP You can change the refresh rate of this page. Please check with your OracleAS administrator or the OracleBI Discoverer documentation for more details.

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[Help](#)

- The single positions report data displays.

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Discoverer Viewer - HR/Payroll Reports User's Guide

- To view **Pooled Positions** data from the open **Single Positions** report, click the **Pooled Transactions** link in **Worksheets** window. Click the **Go** button to execute.
 - The report will run with the same parameters entered for salary transactions. If desired, the parameters may be changed before selecting the **Go** button.

PBUPSNDL - Position Detail Listing - Single Positions

Last run Thursday, March 26, 2009 02:24:41 PM PDT

The screenshot displays the Discoverer Viewer interface. On the left, there are two menu boxes: 'Actions' and 'Worksheets'. The 'Worksheets' box is highlighted with a red dashed border and contains 'Single Positions' and 'Pooled Positions' links. The 'Parameters' section on the right contains the following elements:

- Parameters** (with a dropdown arrow icon)
- Text: "Select values for the following parameters."
- Text: "* Indicates required field"
- Form field: "* Fiscal Year (xxx) '2008'" (with a text input box containing '2008')
- Text: "Enter the Organization Level 1 code (xx)"
- Form field: "'71000'" (with a text input box containing '71000')
- Text: "Numeric field: 2-digits" (in red)

- The **Pooled Positions** report data displays using the same parameter values selected for salary transactions.

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Downloading and Printing Report Data

All reports displayed have an **Actions** window on the page. This window offers options to rerun the displayed query, print the report, or download the report to Excel.

PHRLVBAL - Leave Balance2 - Sheet 1
Last run Thursday, March 26, 2009 01:55:36 PM PDT

Actions

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

Worksheets

- Sheet 1
- Sheet 2

**EASTERN WASHINGTON UNIVERSITY
HUMAN RESOURCES
PHRLVBAL - Leave Balance**

Parameters
Select values for the following parameters.
* Indicates required field

Enter the Supervisor's employee ID (xxxxxxx)
Numeric field: 8-digits

Printable Page

This option allows the report to be displayed in a print output format.

1. From the desired report, select the **Printable Page** option in the **Actions** list.

[Connect](#) > [Workbooks](#) >

PBUPSNDL - Position Detail Listing - Single Positions
Last run Monday, April 6, 2009 03:40:40 PM PDT

Actions

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

Worksheets

- Single Positions
- Pooled Positions

**EASTERN WASHINGTON UNIVERSITY
HUMAN RESOURCES
PBUPSNDL - Position Detail Listing - Single Positions**

Parameters
Select values for the following parameters.
* Indicates required field

Enter the Organization Level 1 code (xx)
Numeric field: 2-digits

2. The **Printable Page Options** page displays. Select the **Printable PDF** option.

Banner

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Connect > Workbooks > PBUPSNL - Position Detail Listing - Single Positions >

Printable Page Options

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

Cancel

Preview sample

Printable PDF

Content

Page Setup

General Options

- Page items Print current selection of page items
 Print all combinations of page items

- Show page items On the first page
 Never

- Show title On the first page
 Never

- Show text area On the first page
 Never

- Data Print all rows and columns
 Print only the rows and columns that are displayed in the worksheet table.

3. The **PDF Process** page displays. If the PDF process takes too long, use the **Cancel** option to cancel the process.

PDF Progress



Processing PDF request

The PDF document you requested is currently being generated. Please wait...

Cancel Refresh

TIP You can change the refresh rate of this page. Please check with your OracleAS administrator or the OracleBI Discoverer documentation for more details.

[Help](#)

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[About OracleBI Discoverer Version 10.1.2.54.25](#)
[Oracle Technology Network](#)

4. When the PDF process completes, the **PDF Ready** page displays. Select the **Click to view or save** link to download the PDF.

Connect > Workbooks > PBUPSNL - Position Detail Listing - Single Positions >

PDF Ready

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



[Click to view or save](#)

[Return to worksheet](#)

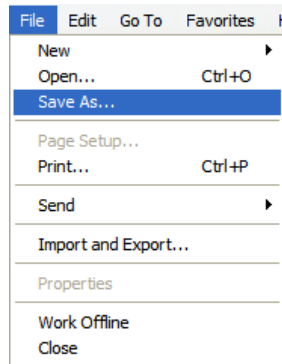
[Preferences](#) | [Exit](#) | [Help](#)

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[About OracleBI Discoverer Version 10.1.2.54.25](#)
[Oracle Technology Network](#)

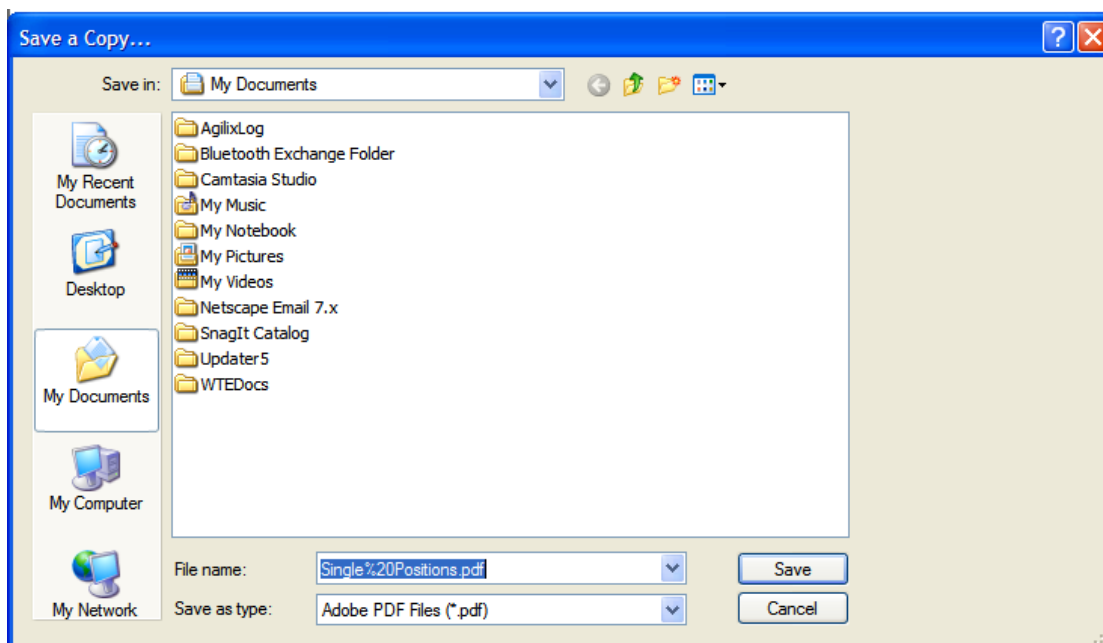
Banner

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- To save the PDF to the desktop or computer drive after it is downloaded, click the **File** menu bar option in the browser window.
 - Select **Save as** from the drop-down list.



- A **Save as** dialog box displays. Enter the following then click **Save**.
 - From the **Save In** field, select the desired save location (for example; My Documents)
 - In the **File name** field enter the desired file name (for example "Single Positions").



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Export

This option allows the report to be exported to Excel;

1. From the desired report, select the **Export** option in the **Actions** list.

The screenshot shows the Oracle Discoverer interface for a report titled "PBUPSNL - Position Detail Listing - Single Positions". The breadcrumb path is "Connect > Workbooks > PBUPSNL - Position Detail Listing - Single Positions". The report was last run on Monday, April 6, 2009 at 03:40:40 PM PDT. On the right side, there are two data columns labeled "EASTER" and "PBUPS".

The "Actions" menu is open, showing options: "Rerun query", "Save as", "Revert to saved", "Printable page", "Export", "Send as email", and "Worksheet options". The "Export" option is highlighted with a red dashed box. Below the "Actions" menu is a "Worksheets" section with options for "Single Positions" and "Pooled Positions".

To the right of the "Export" option is a "Parameters" section. It says "Select values for the following parameters." and "Indicates required field". There is a parameter "Organization Level" with a value of "1 code (xx)" and a text input field. A note below the field says "Numeric field: 2-digits".

2. The **Choose export type** page displays. From the drop-down list select the **Microsoft Excel Workbook** option.

The screenshot shows the "Choose export type" page in Oracle Discoverer. At the top is the Eastern Washington University logo and the text "Oracle Discoverer start something big". The breadcrumb path is "Connect > Workbooks > PBUPSNL - Position Detail Listing - Single Positions >".

The page title is "Choose export type" and it says "Use the drop-down list to specify the export file format." Below this is a drop-down menu with the following options:

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

The "Microsoft Excel Workbook (*.xls)" option is selected. At the bottom right of the page, there are links for "Preferences", "Exit", and "Help".

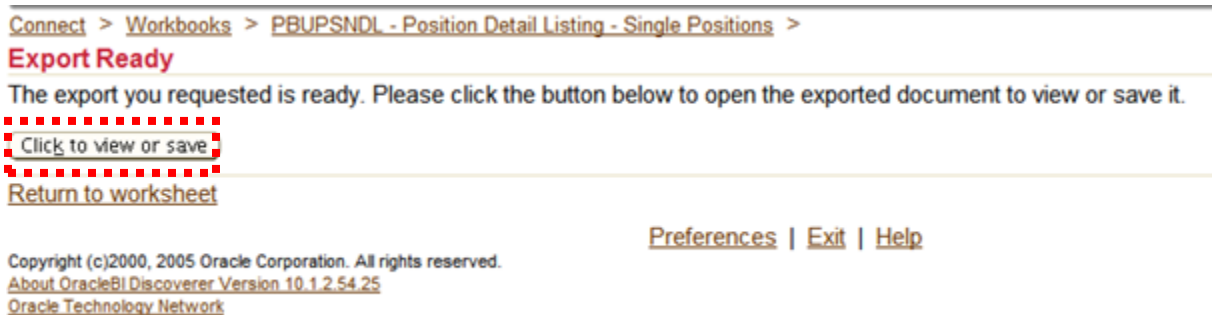
Banner

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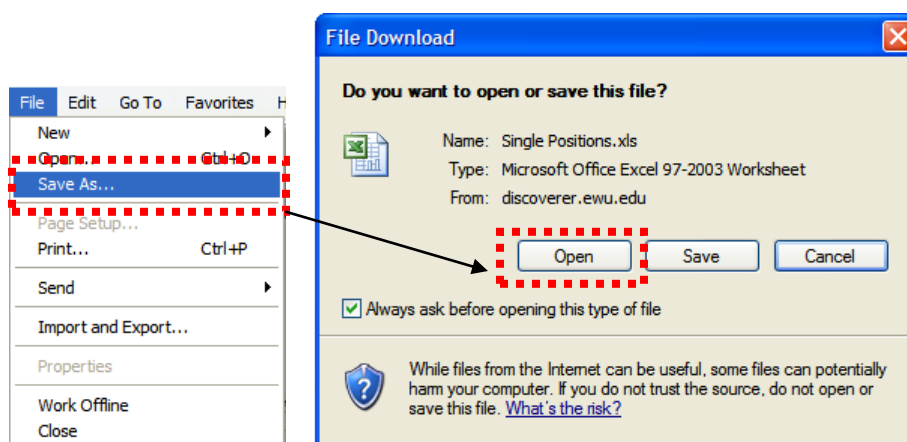
3. Click the **Export** button.



4. When the exported report is ready, click the **Click to view or save** button.



7. To save the Excel file to the desktop or computer drive after it is downloaded, click the **File** menu bar option in the browser window.
 - Select **Save as** from the drop-down list, then **Open** in the **File Download** dialog box.



8. A **Save as** dialog box displays. Enter the following then click **Save**.

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- From the **Save In** field, select the desired save location (for example; My Documents)
- In the **File name** field enter the desired file name (for example "Single Positions").