



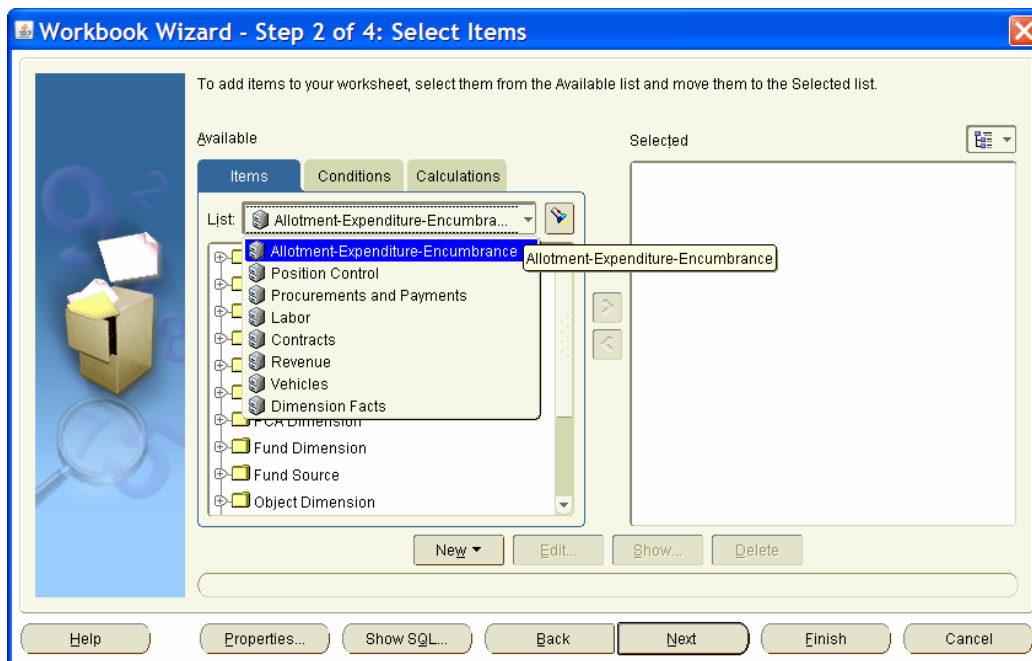
## Chapter 1

The DFG Data Warehouse is an intranet application, developed using Oracle's Discoverer 10g, which will allow Department personnel the ability to access and analyze financial and other data, without having to understand complex database concepts. Through intuitive wizards and menus, Discoverer will assist Department personnel in creating reports to enhance their business decision making ability.

### *Key Terminology*

#### **Business Areas**

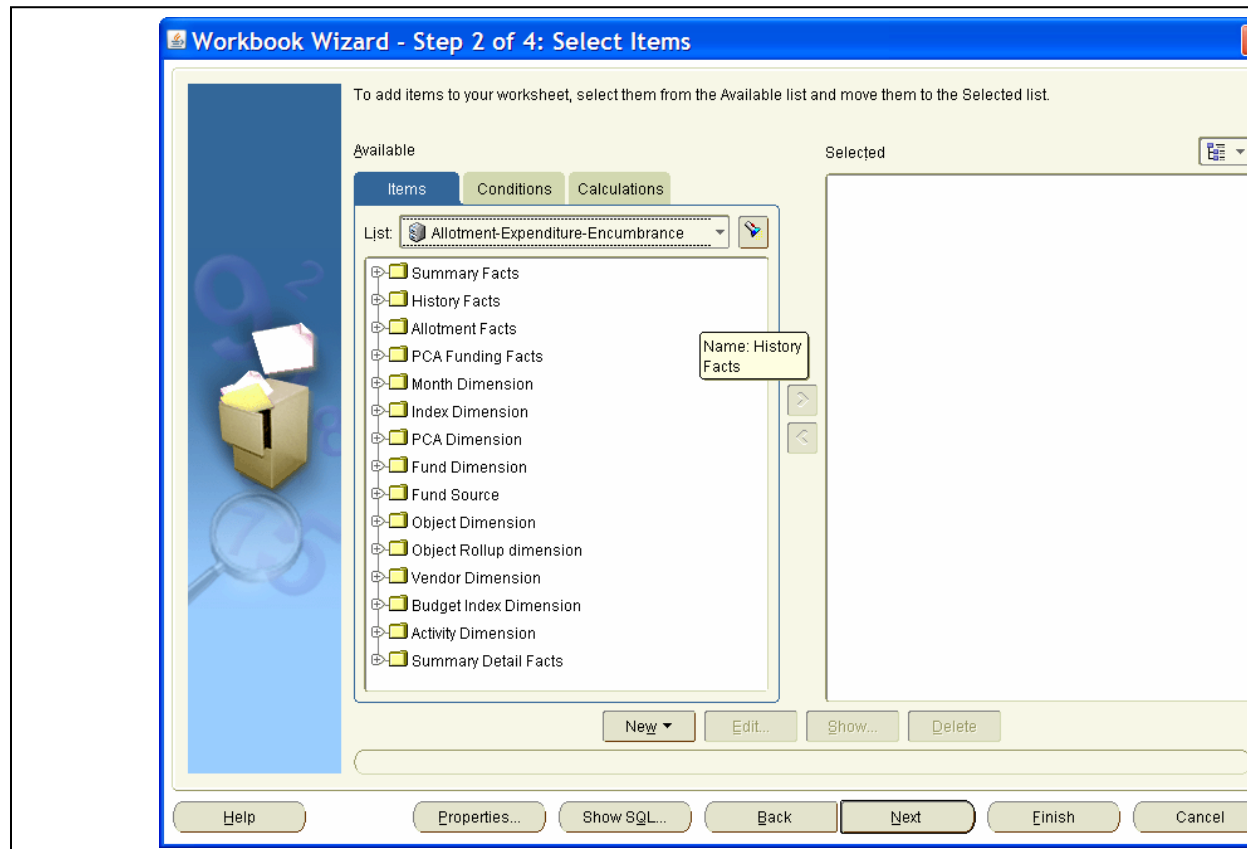
A Business Area is a set of related information revolving around a specific business function within the department. For example, information about Allotments and Expenditures is stored in a business area named "Allotment-Expenditure-Encumbrance" Business Area while information about Labor is stored in a different Business Area named "Labor". In the up-coming descriptions, you will see actual data stored in the Allotment-Expenditure-Encumbrance Warehouse to assist you as you learn to use the Discoverer tool.





## Folders

Folders store details about groups of related information. For example, all details pertaining to PCAs is stored in a folder named “PCA Dimension,” while detailed information about Indexes is stored in another folder named “Index Dimension.” To further simplify the ability to generate reports, the DFG Data Warehouse has adopted a naming convention to distinguish between the two kinds of folders used. Folders in the Data Warehouse are either “Dimension” folders or “Facts” folders. The image below



shows all the folders in the “Allotment-Expenditure-Encumbrance” Business Area.

The warehouse "FACTS" folders contain the bottom-line information about some particular view of the business, such as the dollar amounts of expenditures or encumbrances, or the dollar amounts of contracts and their amendments. The "DIMENSION" tables provide a means of summarizing or drilling down into these facts at higher or lower levels of detail.

Using the "PCA DIMENSION" folder as an example, expenditures and encumbrances from one of the FACTS tables can be summarized at a PROGRAM level, an ELEMENT level, or displayed in detail at the individual PCA level. PROGRAM, ELEMENT and PCA compose the "PCA DIMENSION".



Using the "INDEX DIMENSION" as another example, those same expenditures and encumbrances can be rolled up (summarized) or drilled down (detailed) along the complete CalStars organizational hierarchy, from AGENCY to DIVISION/REGION (known as "section") to SUBSECTION, to UNIT to SUBUNIT to SUB-SUBUNIT.

## Items

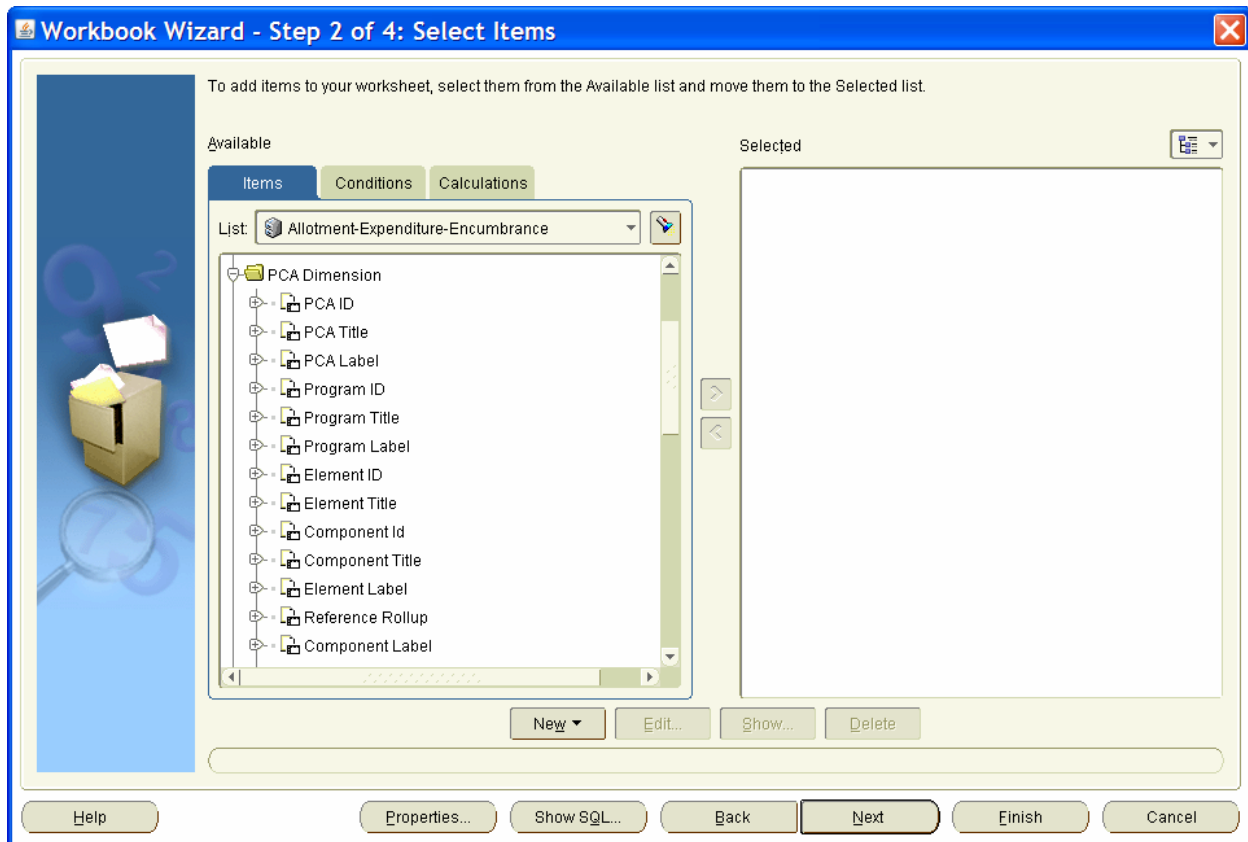
Folders are composed of items. For example, if a folder contains details about PCAs, the items may include PCA ID, PCA Title, Program ID, Program Title, Element ID, and Element Title; etc.

The DFG Data Warehouse uses a few basic naming conventions for item names.

An item name with "ID" is always a code. For example PCA ID would be the item name for a five character PCA code such as "N0300";

An item name with "Title" is the title or description for that code. For example PCA Title would be the item name for the title of a PCA such as "SUPPORT SERVICES – ADMINISTRATION";

An item name with "Label" will be the concatenation of an "ID" and "Title". For example PCA Label would be "N0300 - SUPPORT SERVICES – ADMINISTRATION".





## **Worksheets and Workbooks**

A Worksheet is Discoverer's name for a "report". It contains information retrieved from the Data Warehouse based on the items you have selected. A workbook is a collection of worksheets that is saved in the database or can be exported to a Microsoft Excel file or exported as an HTML (Hyper Text Markup Language) document.

## **Conditions**

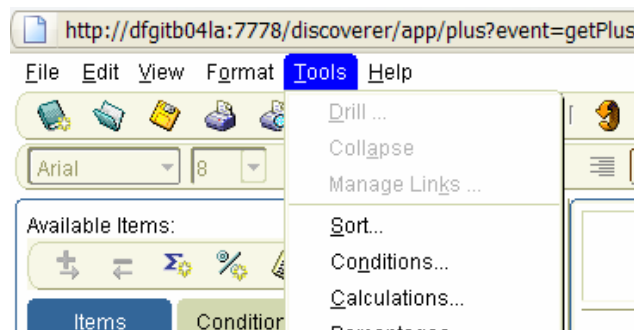
Conditions enable you to narrow down what data to display on worksheets. Conditions filter out data that you are not interested in, enabling you to concentrate on data that you want to analyze. For example, if you wanted to see allotments for Administration Division, you would create a condition to display this data and not the Department as a whole.

## **Parameters**

Parameters allow Discoverer users to analyze worksheets by entering dynamic search criteria. Input values are typically used to provide input to conditions that are used to filter worksheets - for example, when a workbook or worksheet is opened or refreshed, a parameter could be used to first ask the worksheet user "What Index would the user like to analyze?" A worksheet user can then choose to look at a single Index's data, or can choose from two or more Indexes only.

## **Menu Bar**

Discoverer provides you with a standard menu bar. Each menu selection displays a dialog or Wizard to help you perform a task. The figure below shows the Tools menu.





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## ***Tool Bar***

The toolbar contains icons for the most common menu options (e.g. Save, Print, Refresh, Edit Worksheet, Sort). As you become more familiar with Discoverer, the toolbar can be used instead of the menu bar to choose options.



If you briefly place the cursor arrow over the icon, Discoverer will pop-up a small dialog box with the title of that specific icon.