This Armstrong-Smith Consulting white paper contains the following:

- An introduction to libraries within Discoverer

- An introduction to the new company role of library manager

- Details on how to add new reports to a library

- Details on how users gain access to a library report

The Discoverer Library Concept

The concept of a Discoverer library is relatively new and was developed by us as a way to help our clients save money, time and resources. Although it is not an integral part of Discoverer, we got the idea from the libraries in Oracle Applications and expanded on that concept.

We have gone into companies where we have seen multiple report writers creating views, materialized views, end user layers, business areas, workbooks and worksheets that are virtually identical. Imagine the number of wasted man hours and the assault on your bottom line when the left hand does not know what the right hand is doing.

The end result is that the wheel is reinvented over and over again and chaos reigns. To rub salt into the wounds, now imagine what happens when the original developer leaves the company.

Implementation of Discoverer libraries in your company will end the chaos.

This white paper is broken into the following sections:

- Section 1: The Discoverer Library, what is it and what makes library reports different to normal Discoverer workbooks?

- Section 2: The Library Manager, why you need to take control.

- Section 3: Creating library reports, a workflow for getting a new report into the library

- Section 4: Gaining access, a workflow for gaining access to existing library reports

We hope this will prove useful and a good way to get around the traditional issue with Discoverer, where there is no concept of subject folders or organization within an End User Layer.

Section 1 - Discoverer Library

You can think of a library as being a collection of Discoverer workbooks all based around a common theme. For example, you could have one set of workbooks dedicated to human resources, another dedicated to accounts payable, with another being dedicated to maintaining inventory. If you are using Oracle Applications, you can see how easy it would be to set up one library for each module of the system. Each library would have a dedicated, generic user account such that you will create accounts called HR Library, AP Library, and INV Library.

Next you would create two sets of roles, or responsibilities if using Apps. One set would be for the library managers, with names such as HR Library Manager, OE Library Manager, and INV Library Manager. The second set is for end user access, with names such as HR User, AP User, and INV User. Using Discoverer Administrator, the Discoverer manager would assign these roles or responsibilities access to the required business areas.

Next, you would assign the library manager role(s) to designated users. These users would be responsible for maintaining the workbooks inside their library. Logging into Discoverer Plus, the library manager would then SHARE workbooks with the user roles or responsibilities, such that a person with the HR Library Manager role or responsibility would share the HR Workbooks with the HR User role or responsibility.

Now all you have to do is grant the HR role or responsibility to a real HR user and they automatically have access to all of the workbooks in the HR library.

This use of libraries maintains sets of corporate workbooks that adhere to corporate standards, are documented and guaranteed to work. End users cannot modify these workbooks because they are not the owner. Only the library manager has the power to add or remove workbooks. The manager also decides which workbooks get shared and which do not.

As we hope you can see, a Discoverer library is a means of centrally managing and maintaining Discoverer workbooks. The concept is not restricted to 10.1.2 and can be used with every release of Discoverer. However, as explained earlier, the Discoverer 10.1.2 Plus release lends itself perfectly to the use of libraries.

As you now should be aware, a Discoverer library is a collection of reports (workbooks) based around a common theme or business unit. The reports in a library differ from normal workbooks, and reports that are owned by individual report writers.

There are six important features of a library report that make it different from an ordinary Discoverer workbook. Library reports are different to normal Discoverer workbooks in that they are:

- Owned by a library manager

- Guaranteed to be accurate and perform efficiently

- Guaranteed to adhere to corporate standards

- Centrally documented

- Centrally maintained

- Secure with access being strictly controlled

Library Reports are owned by a Library Manager

Perhaps the single biggest difference between a standard Discoverer workbook and a library report is that the library reports are centrally owned and controlled. The person who has this responsibility is the library manager. The manager account will not normally be a real user account but a database account, or Apps account, which is responsible for a set of workbooks. Adopting this method of working ensures the continued existence of the library following the departure of the manager, either from the company or from that position.

NOTE: By default, the Discoverer manager also has the library role for all libraries.

Library Reports are guaranteed to be accurate and perform efficiently.

Candidate reports will have stringent user testing to confirm that they do what they are supposed to do. Before being put forward as candidates for the library, new reports will require user sign off and documentation. The users need to confirm that the report does indeed do what it sets out to do. However, the report needs to not only do what it is supposed to do, but it should do it effectively without putting undue overhead on the system. In other words, where required, the report's underlying SQL will have been optimized for good performance. This may require the writing of special SQL code, either as a Custom folder or a database view.

Library reports are guaranteed to adhere to corporate standards

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

Another standard you may want to consider is the use of prefixes in the naming of your libraries and workbooks. We like to use two or three character prefixes for all of our corporate libraries and workbooks. Using prefixes helps keep track of which workbooks belong to which library and, if we similarly prefix our business areas and folders, which business area the workbook uses. For example, let's say we have a human resources business area. Using the above standard we would prefix the business area name with the letters HR, perhaps naming it HR - Human Resources. All folders within the business area will also get the same prefix so that our employee folder will be called HR - Employees. Following this theme, our library would be called HR - Human Resources, and all library reports will similarly be prefixed.

Library documents are centrally documented

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

Library reports are centrally maintained

Following a request for a change to a library report the library manager will consult with the requesting end user or department head and that department's report writer. The end result of this consultation will either be acceptance or rejection of the request. When a change request is accepted the library manager will release the workbook containing the report and assign it to a report writer. Following a change the report will need user testing, sign off, and updated documentation prior to acceptance back into the library.

Library reports are secure with access being strictly controlled

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

A screenshot of how libraries display in Discoverer Plus is shown below.
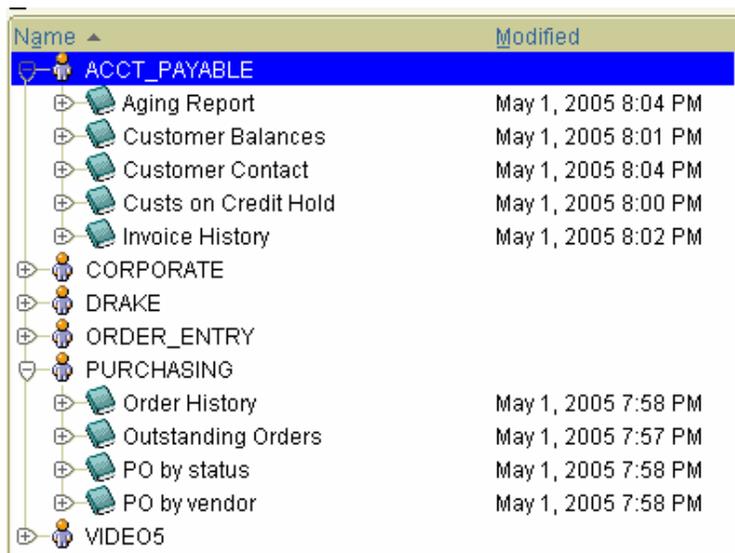
Name ▲	Modified
ACCT_PAYABLE	
Aging Report	May 1, 2005 8:04 PM
Customer Balances	May 1, 2005 8:01 PM
Customer Contact	May 1, 2005 8:04 PM
Custs on Credit Hold	May 1, 2005 8:00 PM
Invoice History	May 1, 2005 8:02 PM
CORPORATE	
DRAKE	
ORDER_ENTRY	
PURCHASING	
Order History	May 1, 2005 7:58 PM
Outstanding Orders	May 1, 2005 7:57 PM
PO by status	May 1, 2005 7:58 PM
PO by vendor	May 1, 2005 7:58 PM
VIDEO5	

Section 2 - Library Manager

The library manager is a very important member of the support staff with whom users need to maintain contact. The library manager is responsible for the following:

- Maintaining the approved list of reports within the library

- Accepting or denying requests for new reports

- Accepting or denying requests for access to reports

- Being a source of help to management for report availability

Library managers work closely with the Discoverer manager, Oracle Apps administrator and the report writers within their business unit to identify the reports that are required. Having identified that a new report is required, the library manager then works with one of the department's report writers to create the report. When a report has been written and has passed acceptance testing by the users, the manager will take an objective look at the report to make sure that corporate standards have been adhered to.

The manager will further ensure that the report documentation effectively describes what the report does and how is should be used. Assuming that all standards and documentation are correct, the library manager will take control of the report and make it available within the library. The above is included as a workflow on the following page.

NOTE: Library managers do not write Discoverer reports. They are working on a higher plane and are more concerned with report availability and accuracy than the inner workings of the reports.

Discoverer Library Concept

Section 3 - Creating new library reports

Use this workflow to get a new report created and added to the library:

1. A new report specification is raised

2. Existing library reports are examined to see if such a report already exists

3. If no report currently exists, a report writer is assigned the task

4. After the report has been built, user acceptance testing must be completed

5. The library documentation is produced by the report writer

6. The report writer shares the new report with the library manager and requests that the report be included in the library

7. Upon receipt of a request for a report to be included in the library, the manager:

   o Checks that corporate standards have been met

   o Checks that requirements have been met

   o Checks that documentation is complete

   o Accepts new report into the library by using Save As

   o Makes report available to the end users using Discoverer's share functionality. The report will normally be shared with a role or responsibility, not with a named user

8. The report writer deletes the report from his / her account

Section 4 - Gaining access to a library report

Before a user can log on to Discoverer, the following steps need to be completed:

1. The user or the user's manager will need to request that access to Discoverer be made available. This request should specify to which database the user needs to have access and to which business areas access should be granted access. The request should also contain the user's contact information, position, and whether they need to have full Discoverer access (report writer) or just the ability to run prewritten reports (report viewer).

2. The library manager will take the request and coordinate it with the DBA, Apps administrator and Discoverer manager. After the DBA or Apps administrator has created the user account and granted to appropriate roles or responsibilities, the Discoverer manager will complete his or her tasks by granting access to the required business areas or roles, and possibly arranging for the user to attend a training course.

3. After the Discoverer manager has completed his or her tasks, the request will be passed back to the library manager for completion. The library manager will ensure that all relevant reports to which the user needs to have access have been shared with that user's role or responsibility. Departmental training will also now be arranged.

4. Finally, when all of the above has been completed, the user will receive notification from the library manager that the account has been set up and has been activated.

As far as is known this white paper is accurate and valid as of June 25, 2005.

Comment from a client of ours "*It certainly sounds a good way to get around the traditional issue with Discoverer, where there is no concept of subject folders or organization within an End User Layer*".

If you spot any errors or omissions please contact us at:

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we will be delighted to make that correction or improvement

Best wishes in advance

Michael Armstrong-Smith

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