

Logging into ODS – Discoverer Plus:

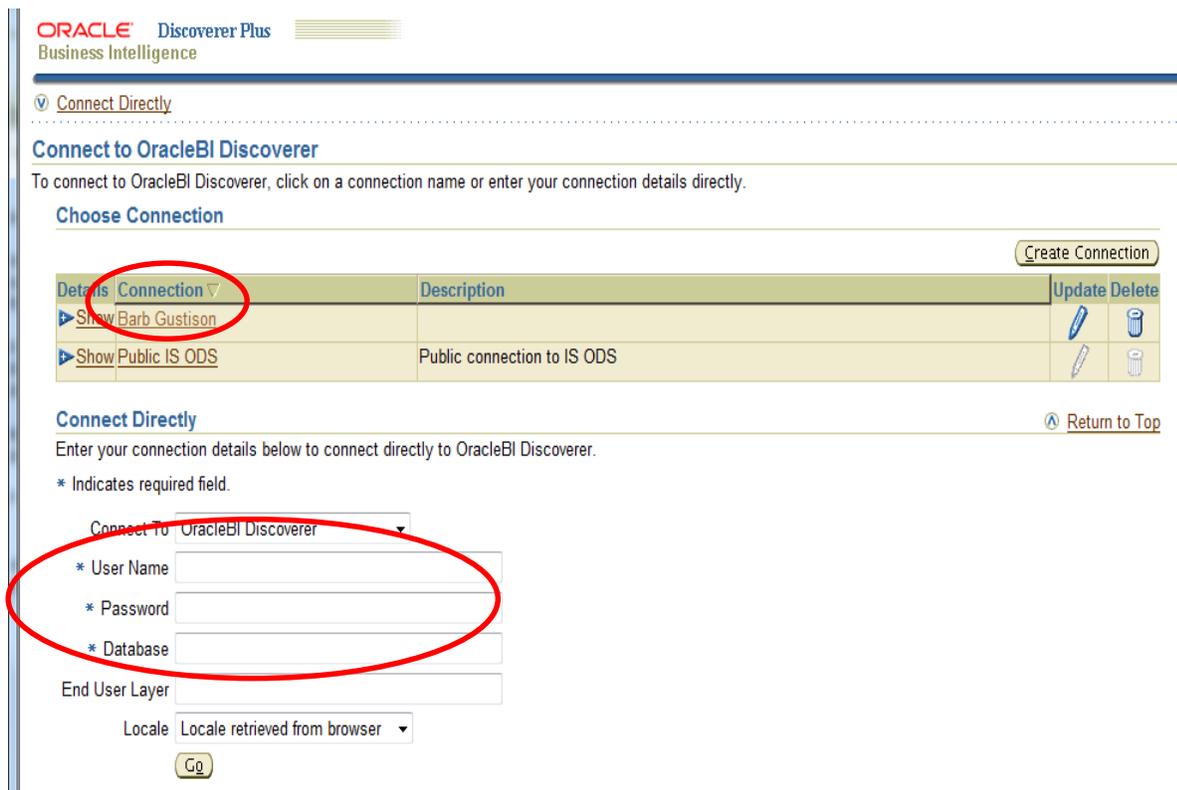
1. From the CSU homepage click on the C in the CSU A-Z box in the upper right hand corner



2. From the list, select Campus Administrative Portal (CAP)
3. Enter your ENAME and EID PASSWORD (this is the same as your computer login)
4. After logging in you will be at the CAP home page. On the right hand side, listed under Quick Applications, click on Discoverer Plus



5. If you have already created a connection, click on your connection. If you don't have a connection, enter your User Name, Password & Database. The Database to use is ODSPROD



ORACLE Discoverer Plus
Business Intelligence

Connect Directly

Connect to OracleBI Discoverer

To connect to OracleBI Discoverer, click on a connection name or enter your connection details directly.

Choose Connection Create Connection

Details	Connection	Description	Update	Delete
▶ Show	Barb Gustison			
▶ Show	Public IS ODS	Public connection to IS ODS		

Connect Directly Return to Top

Enter your connection details below to connect directly to OracleBI Discoverer.

* Indicates required field.

Connect To: OracleBI Discoverer

* User Name

* Password

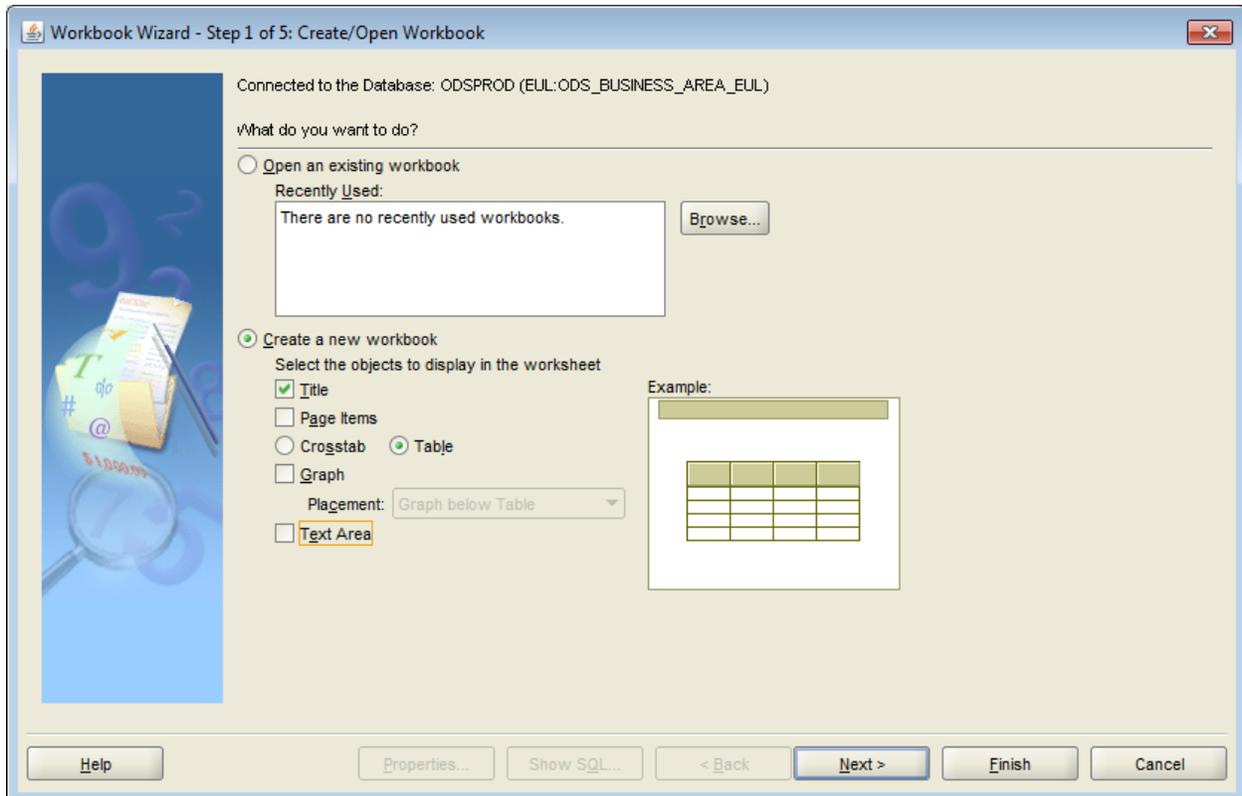
* Database

End User Layer

Locale: Locale retrieved from browser

Working in ODS:

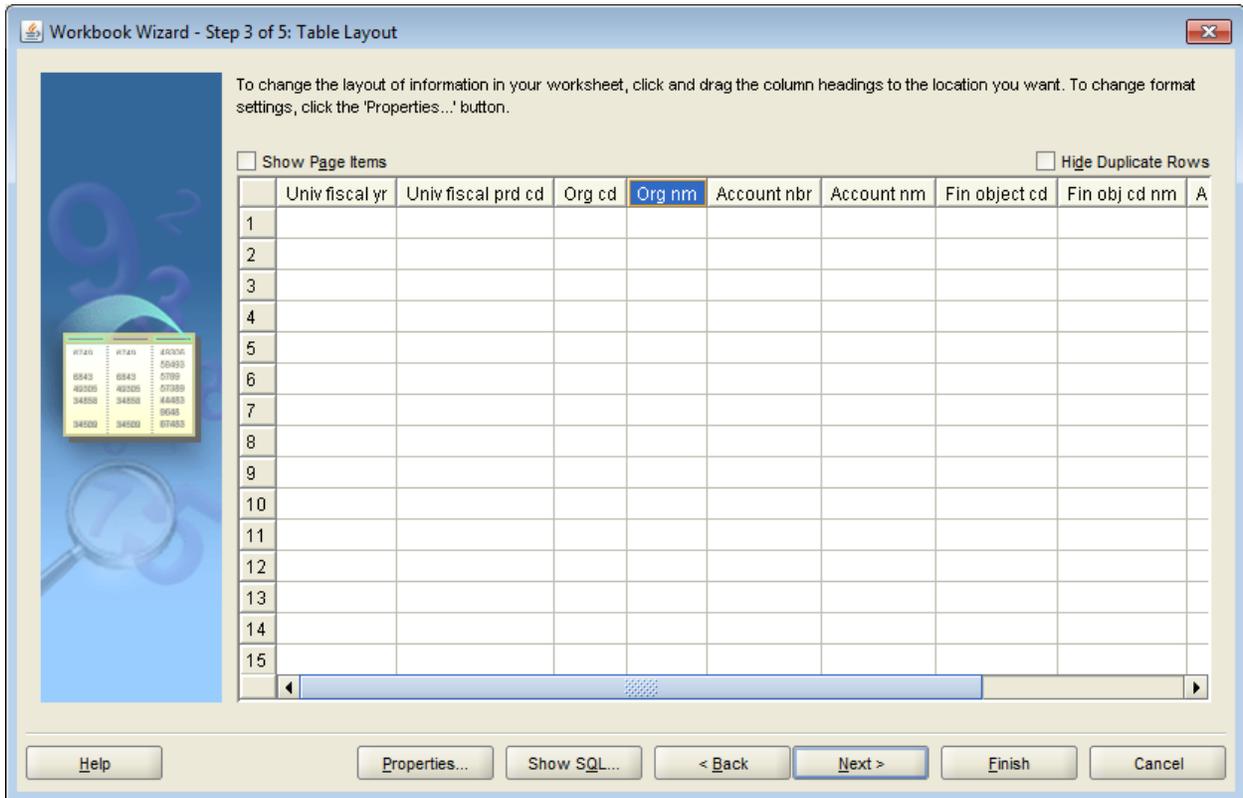
1. Once you are logged in you will see the following box within the main screen:
 - a. If you have already saved workbooks, you can select the top option that says Open an existing workbook workbook
 - b. To create a new workbook, select the bottom option that says Create a new workbook
 - i. You can then select the objects you wish to display in the worksheet: Title, Page items, etc.
2. To create a basic table with a title, uncheck Page items, Graph and Text Area (Step 1 of 5). Then click Next at the bottom of the screen.



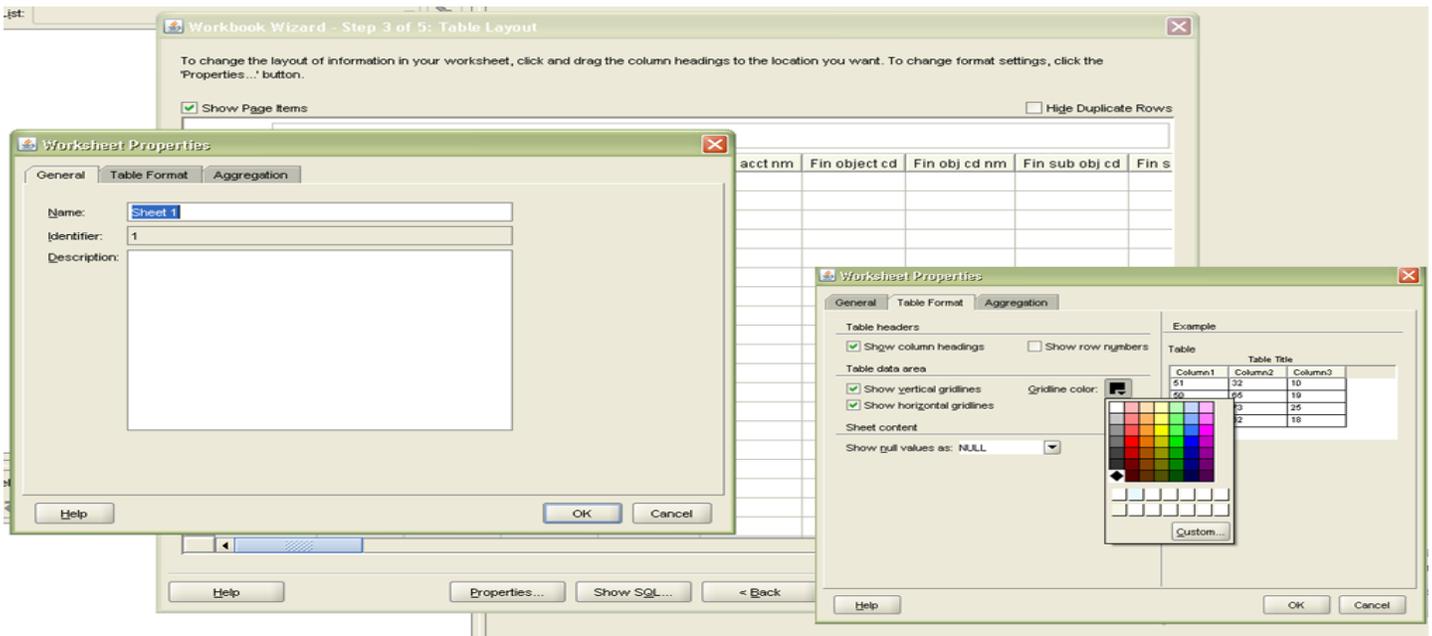
3. The next box that appears will allow you to add items to your worksheet (Step 2 of 5). Click on the (+) symbol next to any folder to reveal all available fields.
 - a. The box on the left shows what is Available, and the box on the right shows what is Selected.
 - b. To add items to your worksheet, simply select them from the Available box, and using the arrows in between the two, move them to the Selected box.
 - i. To select several items to be moved rather than 1 at a time, hold down the Ctrl key on your keyboard and click on the desired items. You can then press the (>) arrow to move them to the Selected box all at once.
 1. Under the folder “GI Balance Summary Adj” select the following:

- a. Univ fiscal yr, Univ fiscal prd cd, Org cd, Org nm, Account nbr, Account nm, Fin object cd, Fin obj cd nm, Actual beg bal SUM, Actl ytd SUM and click the “>” to move those over.
- b. Click next

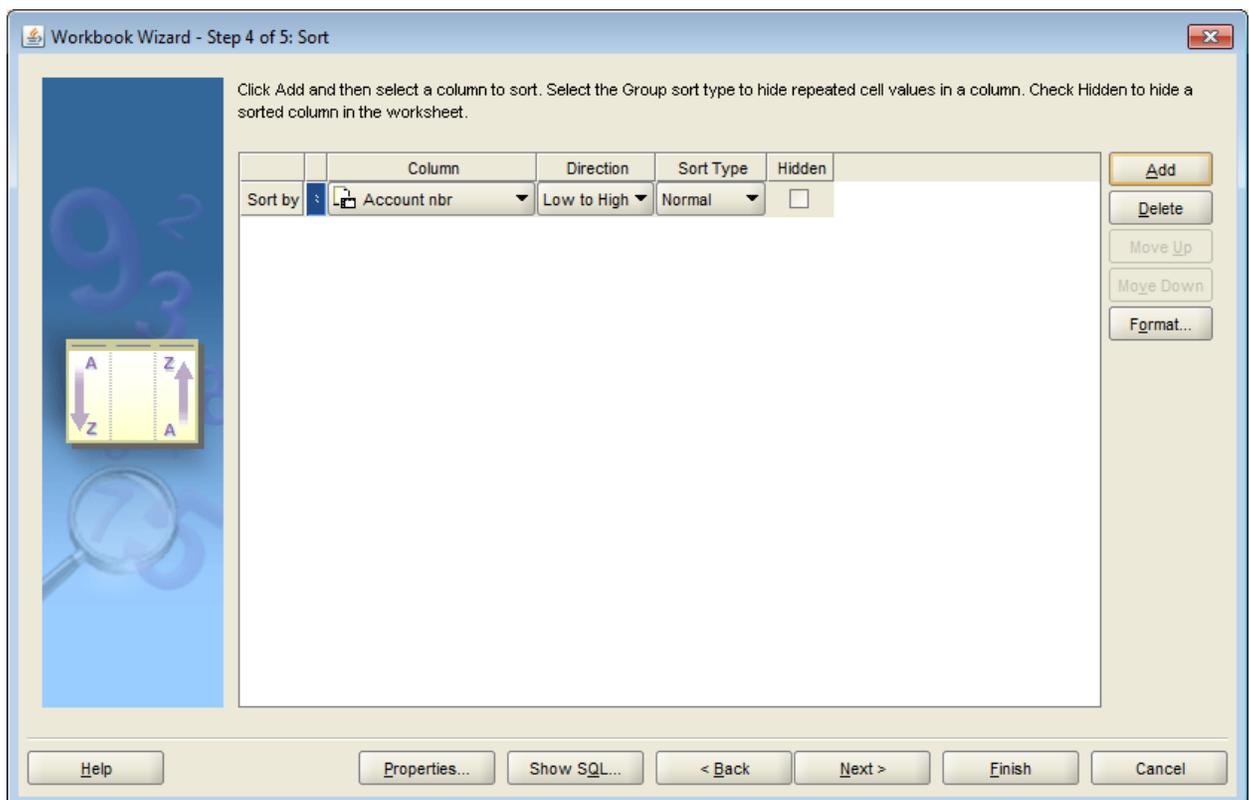
4. In the next box you can change the layout information in the worksheet by dragging the column headings to the location you want (Step 3 of 5). To change format settings, click the ‘Properties...’ button.



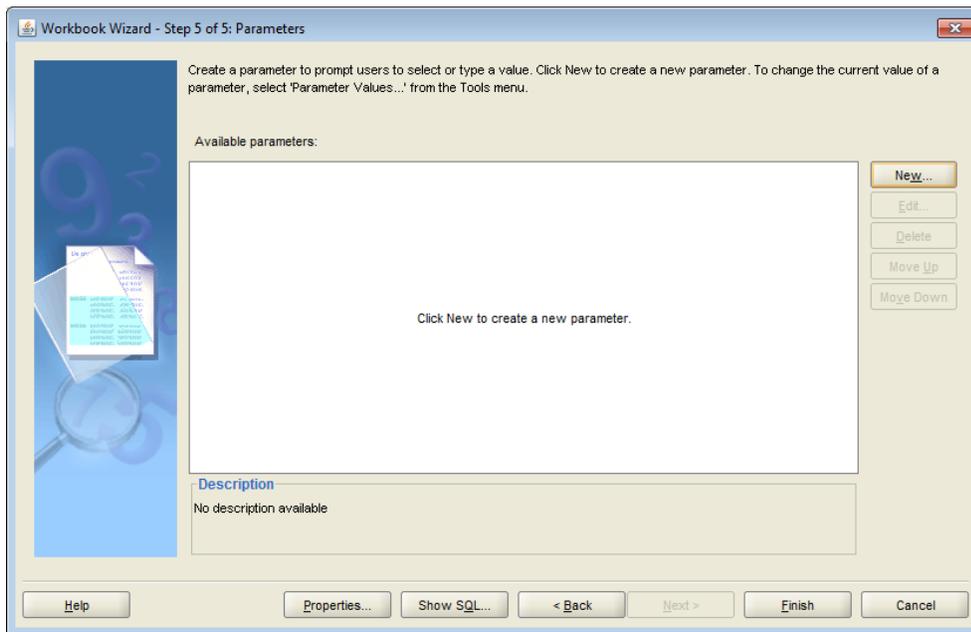
- a. By selecting the Properties button you are able to do the following:
 - i. General Tab: Name the Worksheet
 - ii. Table Format: changes/shows gridlines or to show column headings and or row numbers
 - iii. FYI: the properties can be changed and adjusted at any time – even after the workbook is saved.



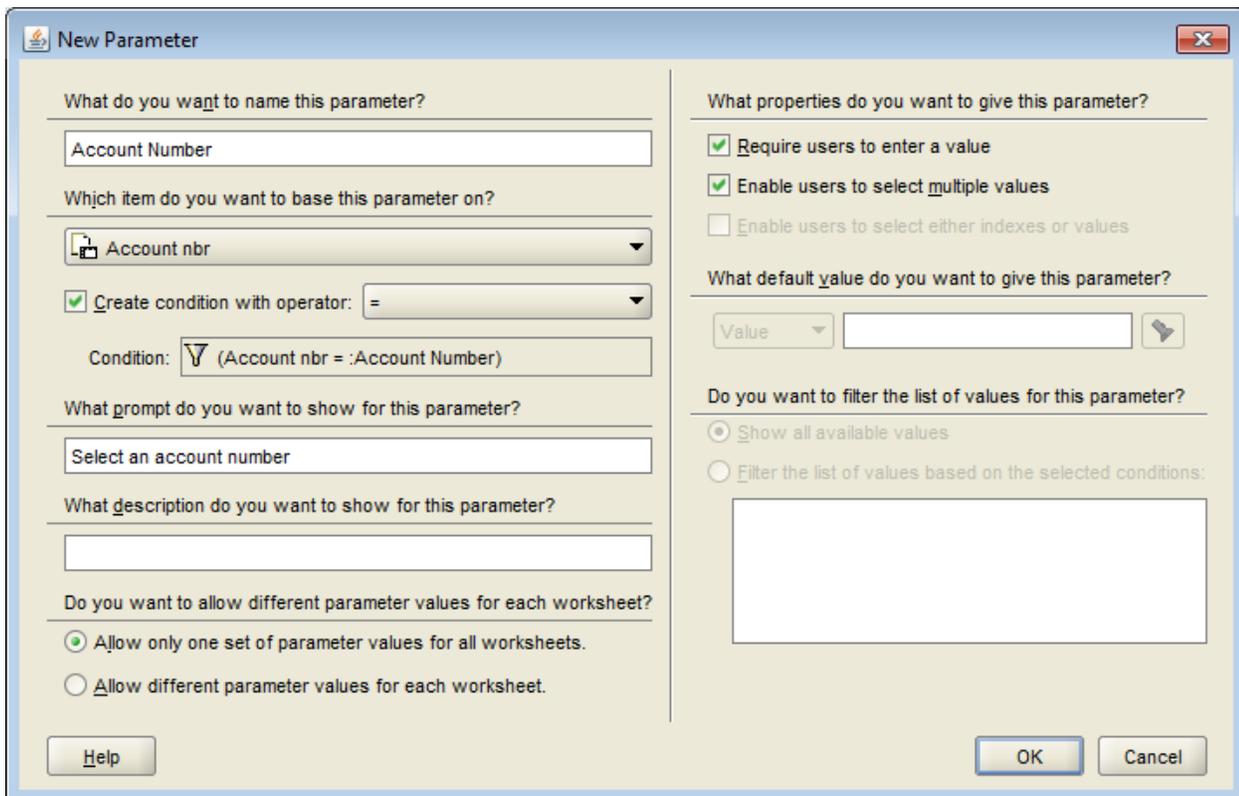
5. In the next step you can select a column to sort, by clicking the “Add” button and selecting the column (Step 4 of 5).
 - a. Sort Options: Add, Delete, Move Up, Move Down, and Format. Once you have them listed above (added), you can re-arrange them by sort preference. Highlight the item and click either ‘Move Up’ or ‘Move Down.’



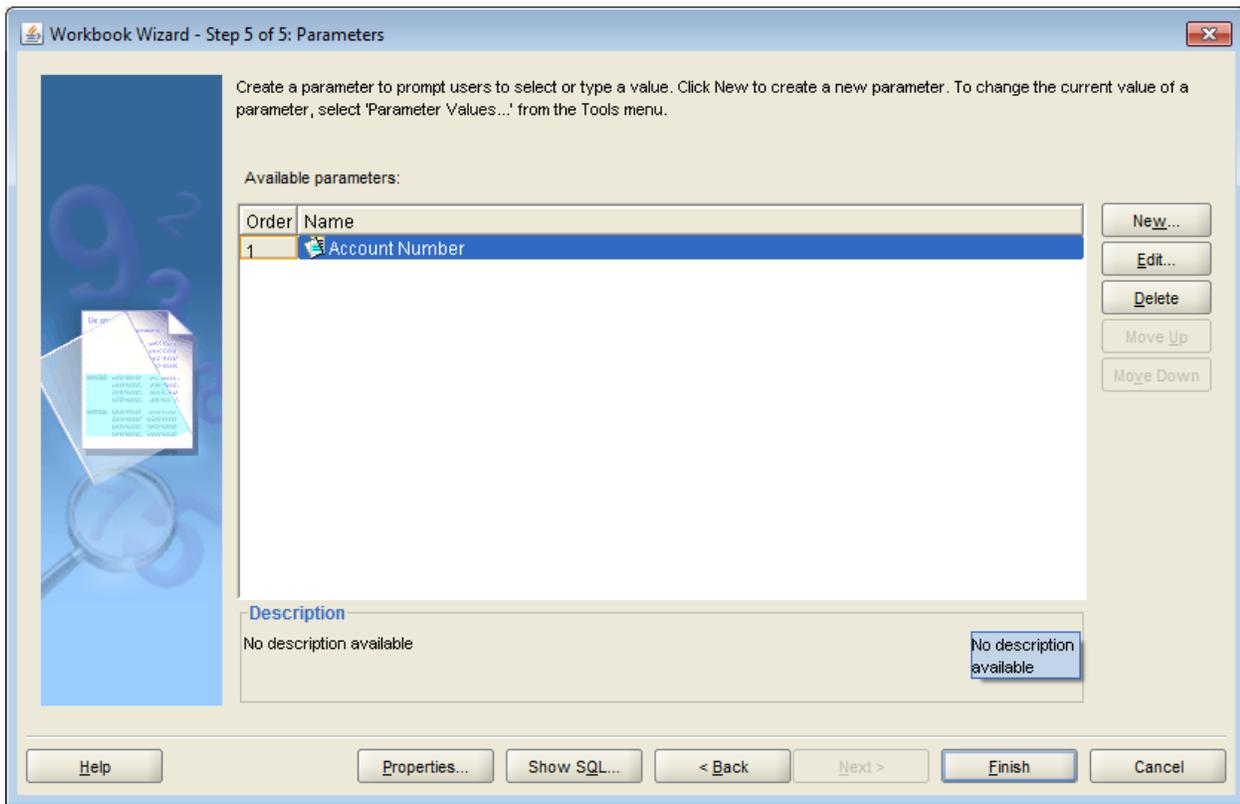
6. In the next step you can create a parameter to prompt users to select or type a value. Click New to create a new parameter (step 5 of 5). To change the current value of a parameter, select “Parameter Values’ from the Tools menu.



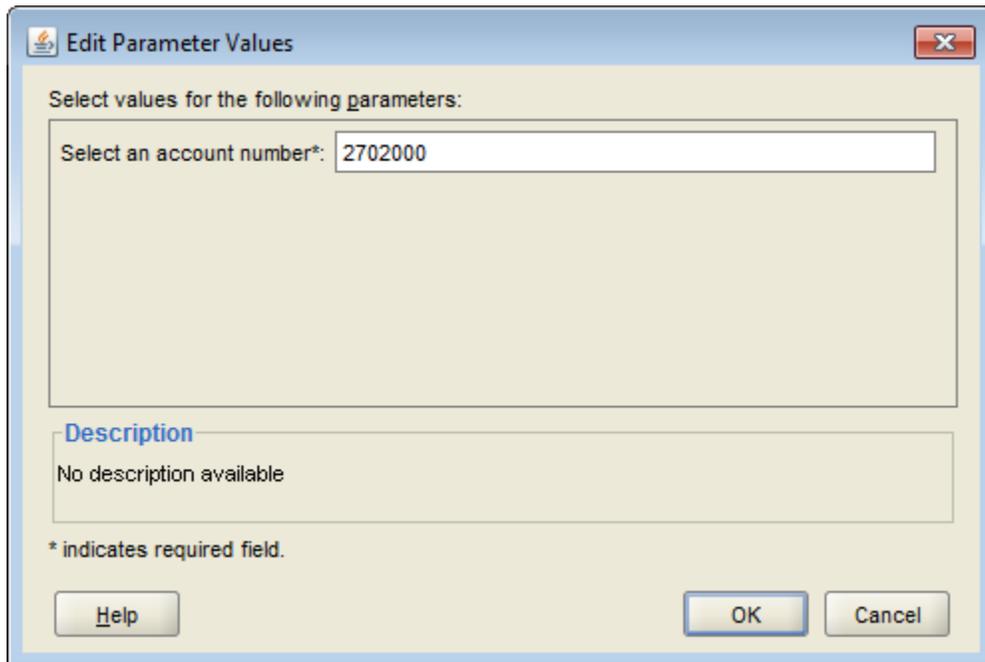
- a. Create a parameter for account number 2702000, then click ok.



7. Next, click Finish to complete the creation of your document.



- a. After you select “finish” the window below will pop up where you enter the account number you want. In this case we are using 2702000.



- b. Once the account number is entered click “Finish.”

http://padroni.colostate.edu/7778/?event=getPlusPlugin&remoteSessionID=1 - Workbook 1 - Orac - Windows Internet Explorer

Available Items:

- Items
- Conditions
- Calculations

List: All Items

My Conditions

- Account nbr = Account Number

Selected Items:

- Univ fiscal yr
- Univ fiscal prd cd
- Org cd
- Org nm
- Account nbr
- Account nm
- Fin object cd
- Fin obj cd nm
- Actual beg bal SUM

Double-click here to edit the title

Univ fiscal yr	Univ fiscal prd cd	Org cd	Org nm	Account nbr	Account nm	Fin object cd	Fin obj cd nm	Actual beg bal SUM	Acti ytd SUM
2010	09	8011	Student Orientation	2702000	Preview Orientation	5112	Admin Pro Fringe	0	13053
2010	09	8011	Student Orientation	2702000	Preview Orientation	5151	Admin Pro Salary S	0	14400
2010	09	8011	Student Orientation	2702000	Preview Orientation	6011	Professional Serv	0	339
2011	01	8011	Student Orientation	2702000	Preview Orientation	5581	Temp Sa Salary T	0	3250
2011	01	8011	Student Orientation	2702000	Preview Orientation	5582	Temp Sa Fringe T	0	371
2011	06	8011	Student Orientation	2702000	Preview Orientation	6653	Participant Travel	0	1377
2011	07	8011	Student Orientation	2702000	Preview Orientation	6603	Printing & Copy S	0	11591
2011	03	8011	Student Orientation	2702000	Preview Orientation	5599	Budget Temp Sa F	0	0
2011	01	8011	Student Orientation	2702000	Preview Orientation	5609	Budget Stu Wl Frn	0	0
2011	01	8011	Student Orientation	2702000	Preview Orientation	6071	Cost Misc Travel	0	0
2012	09	8011	Student Orientation	2702000	Preview Orientation	6201	General Supplies	0	4872
2013	10	8011	Orientation + Transf	2702000	Preview Orientation	2030	Tax-Fort Collins T	0	0
2013	09	8011	Orientation + Transf	2702000	Preview Orientation	6705	Doubtful Account	0	429
2013	04	8011	Orientation & Transf	2702000	Preview Orientation	4382	Gen Sales Of Ser	0	-440965
2010	01	8011	Student Orientation	2702000	Preview Orientation	6649	Official Functions	0	290
2010	01	8011	Student Orientation	2702000	Preview Orientation	5151	Admin Pro Salary S	0	9600
2010	06	8011	Student Orientation	2702000	Preview Orientation	5152	Admin Pro Fringe S	0	3614
2010	03	8011	Student Orientation	2702000	Preview Orientation	5352	Ota Fringe	0	95
2010	12	8011	Student Orientation	2702000	Preview Orientation	6011	Professional Serv	0	339
2012	02	8011	Student Orientation	2702000	Preview Orientation	6005	Networking Chang	0	0
2012	12	8011	Student Orientation	2702000	Preview Orientation	6684	Credit Card Clear	0	-1443
2014	10	NULL	NULL	2702000	Preview Orientation	6201	NULL	0	468
2013	10	8011	Orientation + Transf	2702000	Preview Orientation	6225	Computer Hardwa	0	0
2014	01	8011	Orientation + Transf	2702000	Preview Orientation	1437	Other Receivable	0	-502
2014	03	NULL	NULL	2702000	Preview Orientation	2590	NULL	0	246
2010	06	8011	Student Orientation	2702000	Preview Orientation	5111	Admin Pro Salary	0	36248
2010	10	8011	Student Orientation	2702000	Preview Orientation	2100	Accounts Payabl	0	0
2010	01	8011	Student Orientation	2702000	Preview Orientation	5012	Faculty Fringe	0	2410
2010	09	8011	Student Orientation	2702000	Preview Orientation	5012	Faculty Fringe	0	3561
2010	04	8011	Student Orientation	2702000	Preview Orientation	5151	Admin Pro Salary S	0	14400
2010	04	8011	Student Orientation	2702000	Preview Orientation	5152	Admin Pro Fringe S	0	3614
2010	02	8011	Student Orientation	2702000	Preview Orientation	1740	Other Prepaids	12240	12240
2010	08	8011	Student Orientation	2702000	Preview Orientation	6210	Capital Equipment	0	5788
2010	03	8011	Student Orientation	2702000	Preview Orientation	6075	Cost Per Diem	0	0
2010	12	8011	Student Orientation	2702000	Preview Orientation	6207	Books/PeriodSub	0	872
2012	10	8011	Student Orientation	2702000	Preview Orientation	6603	Printing & Copy S	0	17773
2012	10	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Ser	0	-361714
2012	13	8011	Student Orientation	2702000	Preview Orientation	2515	Deferred Fees	-2779	-2550
2012	08	8011	Student Orientation	2702000	Preview Orientation	5412	Stolass Fringe	0	1152
2011	13	8011	Student Orientation	2702000	Preview Orientation	2515	Deferred Fees	-3993	-2779
2011	02	8011	Student Orientation	2702000	Preview Orientation	4381	Gen Merchandise	0	-41
2011	07	8011	Student Orientation	2702000	Preview Orientation	4381	Gen Merchandise	0	-4300
2011	04	8011	Student Orientation	2702000	Preview Orientation	5411	Stolass Salary	0	2133
2011	05	8011	Student Orientation	2702000	Preview Orientation	5151	Admin Pro Salary S	0	5292
2011	07	8011	Student Orientation	2702000	Preview Orientation	6613	Doubtful Account	0	270

Sheet 1

8. Now we have created our workbook, but we realize we want to add the following parameters:

- Fiscal Year: 2012
- Object Code: 4382

c. To update our parameters, you will select “edit table” button on your tool bar. 

d. That will bring up the “Edit Worksheet”, in which you can update your parameters, by selecting “New”.

Edit Worksheet

Worksheet Layout | Select Items | Table Layout | Sort | Parameters

Create a parameter to prompt users to select or type a value. Click New to create a new parameter. To change the current value of a parameter, select 'Parameter Values...' from the Tools menu.

Available parameters:

Order	Name
1	Account Number

Description
No description available

Buttons: New..., Edit..., Delete, Move Up, Move Down

Buttons: Help, Properties..., Show SQL..., OK, Cancel

e. After clicking “New” we will create a parameter for Current Fiscal Year.

New Parameter

What do you want to name this parameter?

Which item do you want to base this parameter on?

Create condition with operator: =
 Condition:

What prompt do you want to show for this parameter?

What description do you want to show for this parameter?

Do you want to allow different parameter values for each worksheet?
 Allow only one set of parameter values for all worksheets.
 Allow different parameter values for each worksheet.

What properties do you want to give this parameter?
 Require users to enter a value
 Enable users to select multiple values
 Enable users to select either indexes or values

What default value do you want to give this parameter?

Do you want to filter the list of values for this parameter?
 Show all available values
 Filter the list of values based on the selected conditions:

f. Now we want to create an object code parameter, by clicking “new”.

New Parameter

What do you want to name this parameter?

Which item do you want to base this parameter on?

Create condition with operator: =
 Condition:

What prompt do you want to show for this parameter?

What description do you want to show for this parameter?

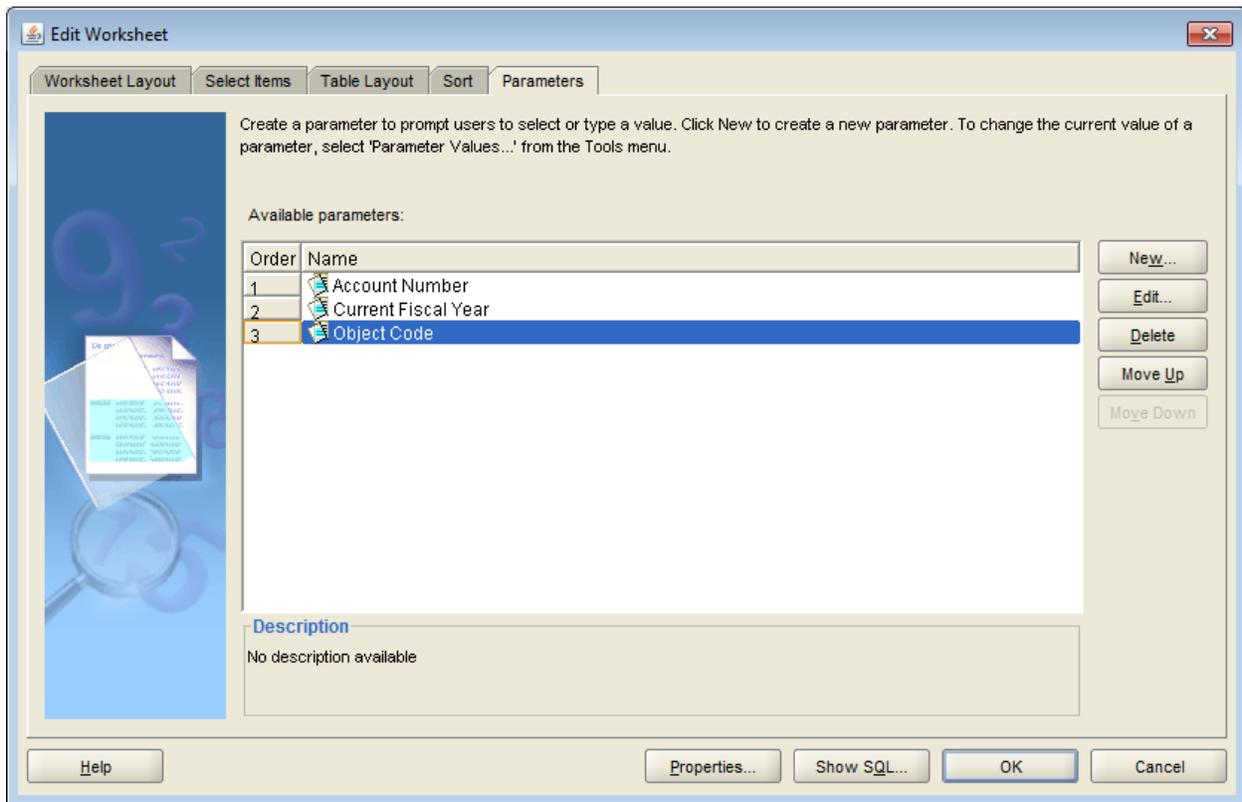
Do you want to allow different parameter values for each worksheet?
 Allow only one set of parameter values for all worksheets.
 Allow different parameter values for each worksheet.

What properties do you want to give this parameter?
 Require users to enter a value
 Enable users to select multiple values
 Enable users to select either indexes or values

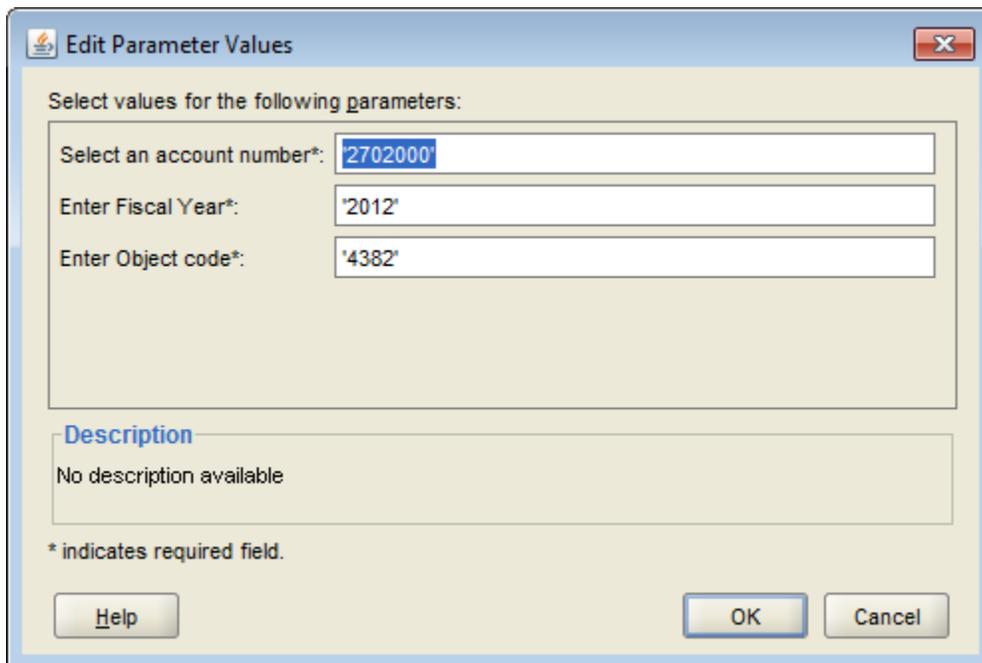
What default value do you want to give this parameter?

Do you want to filter the list of values for this parameter?
 Show all available values
 Filter the list of values based on the selected conditions:

g. Once you have added these object codes click “ok.”



h. Next you will be prompted to enter your parameters.



i. After clicking, "OK", your report will run.

http://padroni.is.colostate.edu:7778/?event=getPlusPlugin&remoteSessionID=1 - Workbook 1 - Orac - Windows Internet Explorer

File Edit View Format Tools Help

Agency FB 3

Available Items:

Items Conditions Calculations

List: Financial Reporting

--- ARVID VIEWS---

- Asset Component
- Asset detail
- Asset payment
- Asset Warranty
- Credit memo
- Disbursement Voucher
- GI Balance Summary Adj
 - Univ fiscal yr
 - Univ fiscal prd cd
 - Univ Fiscal Prd Nm
 - Org cd
 - Org nm
 - Fin coa cd
 - Fin Coa Desc
 - Account nbr
 - Account nm
 - Sub acct nbr
 - Sub acct nm
 - Fin object cd
 - Fin obj cd nm
 - Fin sub obj cd
 - Fin Sub Obj Cd Nm
 - Fin balance typ cd

Selected Items:

- Univ fiscal yr
- Univ fiscal prd cd
- Org cd
- Org nm
- Account nbr
- Account nm
- Fin object cd
- Fin obj cd nm

Double-click here to edit the title

Univ fiscal yr	Univ fiscal prd cd	Org cd	Org nm	Account nbr	Account nm	Fin object cd	Fin obj cd nm	Actual beg bal SUM	Act ytd SL
2012	01	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-1598
2012	02	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-1909
2012	03	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-1896
2012	04	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-1904
2012	05	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-1919
2012	06	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-1925
2012	07	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-2082
2012	08	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-2307
2012	09	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-2880
2012	10	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-3617
2012	11	8011	Student Orientation	2702000	Preview Orientation	4382	Gen Sales Of Service-Aux	0	-3929
2012	12	NULL	NULL	2702000	NULL	4382	NULL		-3929
2012	13	NULL	NULL	2702000	NULL	4382	NULL	0	-3929

Sheet 1

- j. At any time you want to update the information in your parameters click the refresh button. 
- k. If you want to delete or edit your parameters start with Step 8 above, and instead of clicking "New" click "edit" or "delete."

9. CONDITIONS: You also have the option to use conditions. So, within our parameters we have already set up, we want to only look at University Fiscal Period Code 01-03. To do this, we will click on "New Condition" un Available Items .

- a. This will bring up the New Condition screen where you can input your information.

Edit Condition

What would you like to name your condition?
 (Univ fiscal prd cd BETWEEN '01'AND'04') Generate name automatically

What description would you like to give your condition?
 Q1

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
: GI Balance Summary Adj.Univ fiscal prd cd	BETWEEN	'01' and '03'

Case-sensitive

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

Help OK Cancel