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

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
   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 “GL 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.

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

   a. Fiscal Year: 2012
   b. 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”.
   
   e. After clicking “New” we will create a parameter for Current Fiscal Year.
f. Now we want to create an object code parameter, by clicking “new”.

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.
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” under Available Items.

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