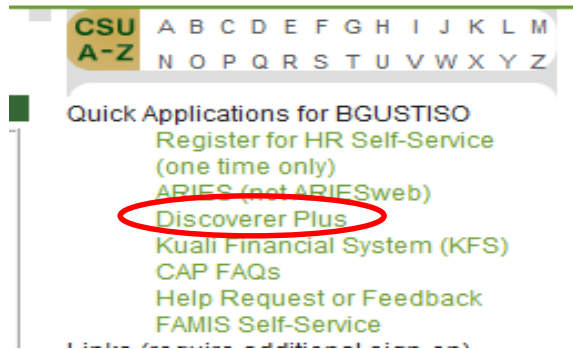


## Logging into ODS – Discoverer Plus:

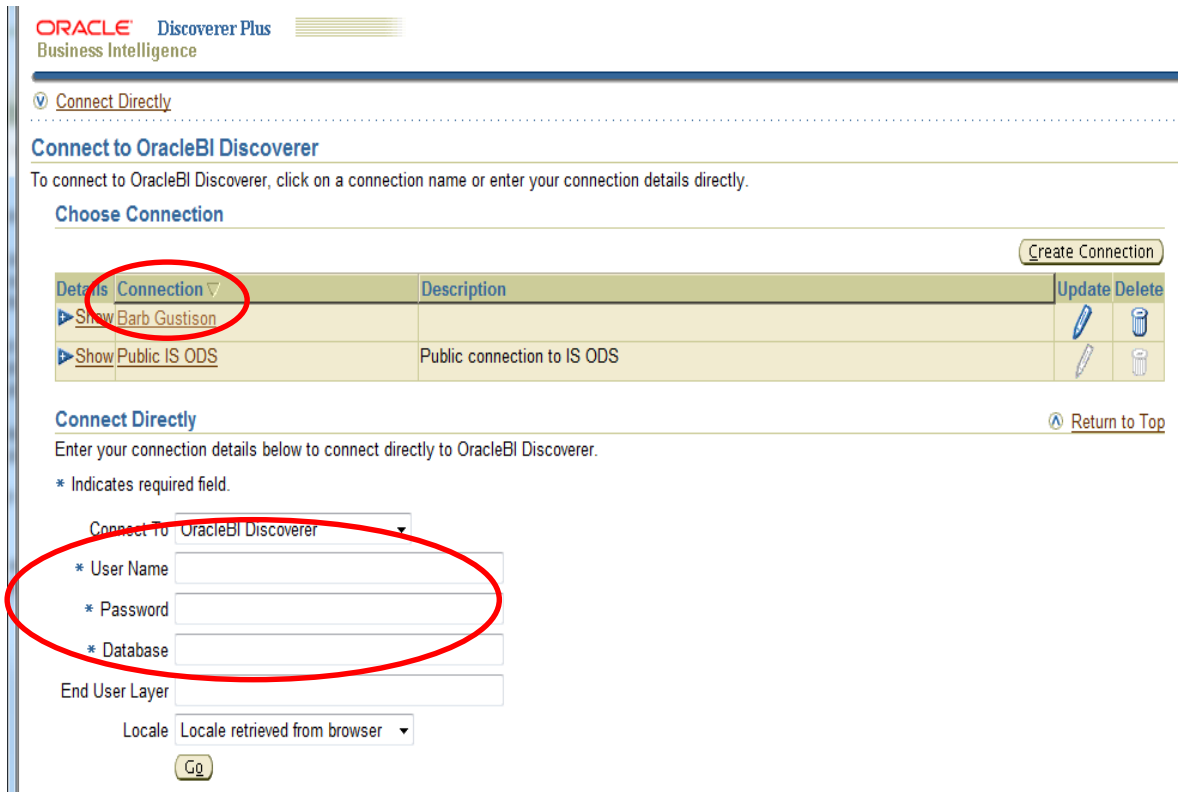
1. From the CSU homepage click on the C in the CSU A-Z box in the upper right hand corner



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

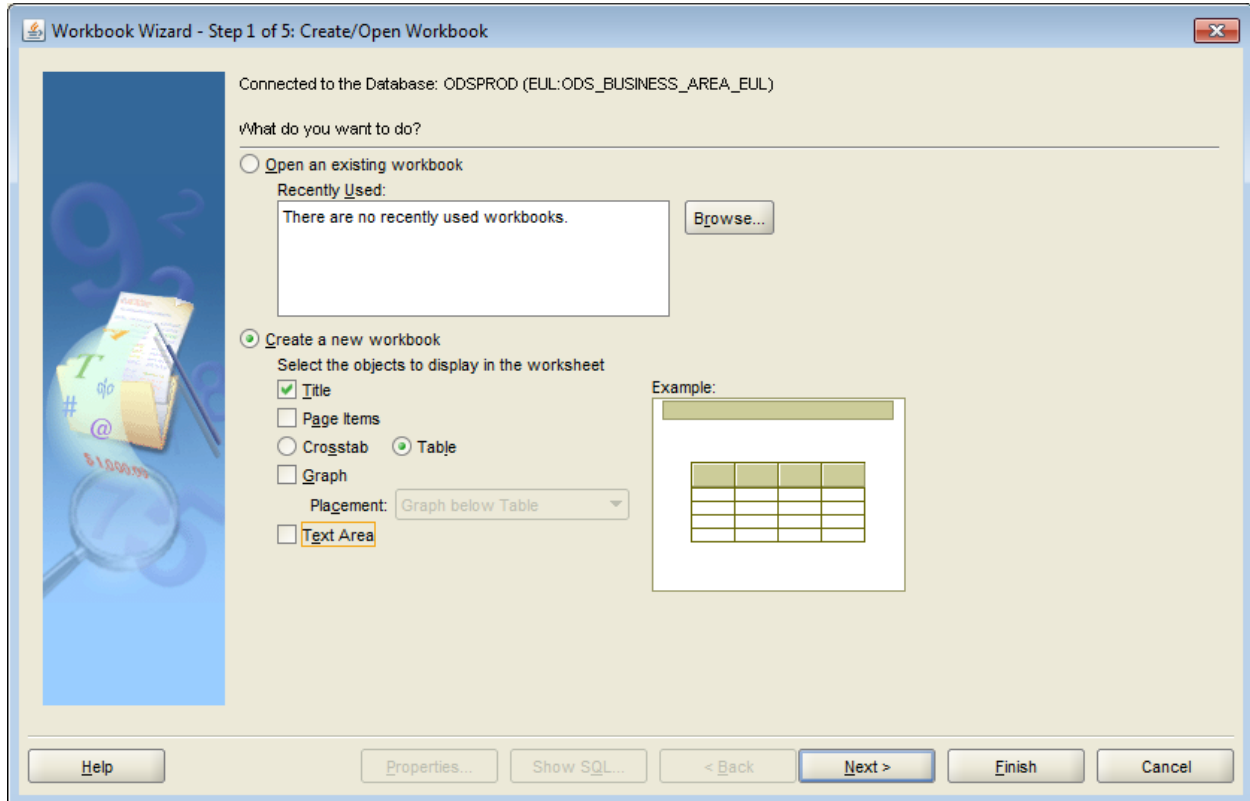
\* Database

End User Layer

Locale: Locale retrieved from browser

## Working in ODS:

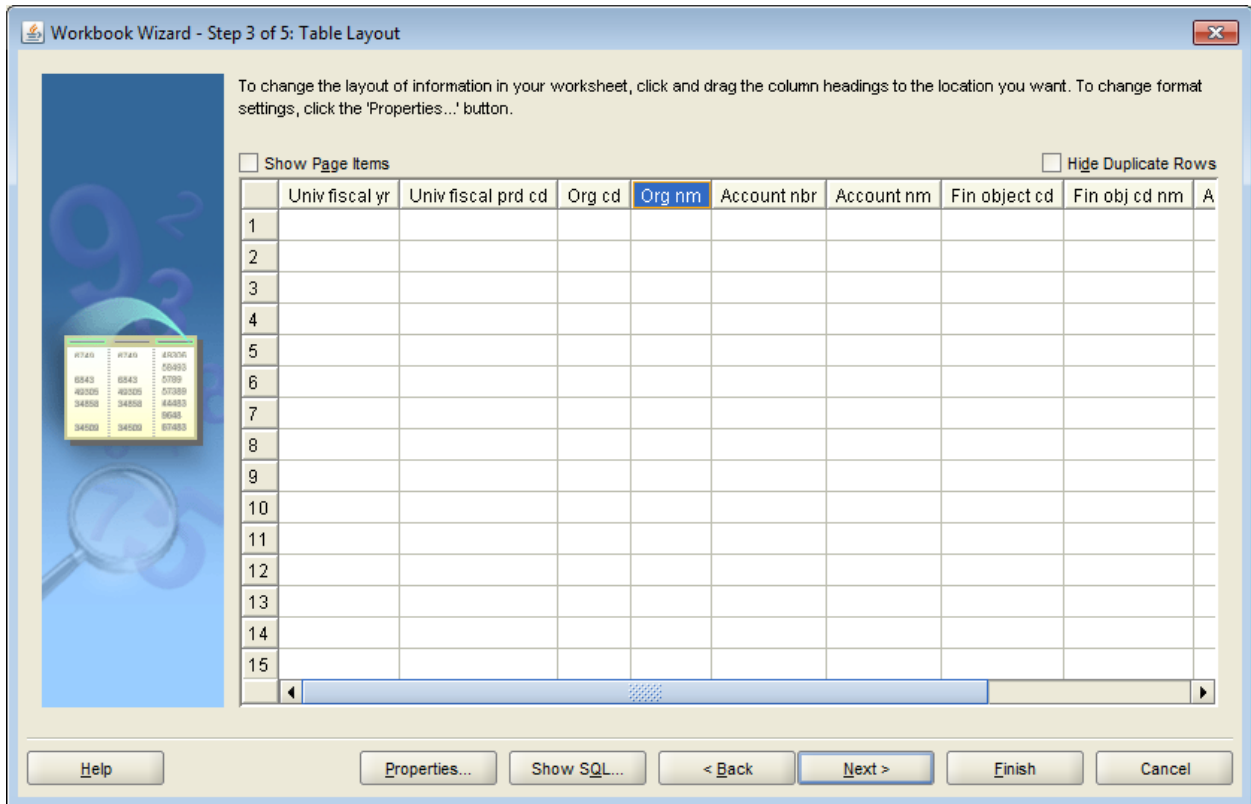
1. Once you are logged in you will see the following box within the main screen:
  - a. If you have already saved workbooks, you can select the top option that says Open an existing workbook workbook
  - b. To create a new workbook, select the bottom option that says Create a new workbook
    - i. You 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.



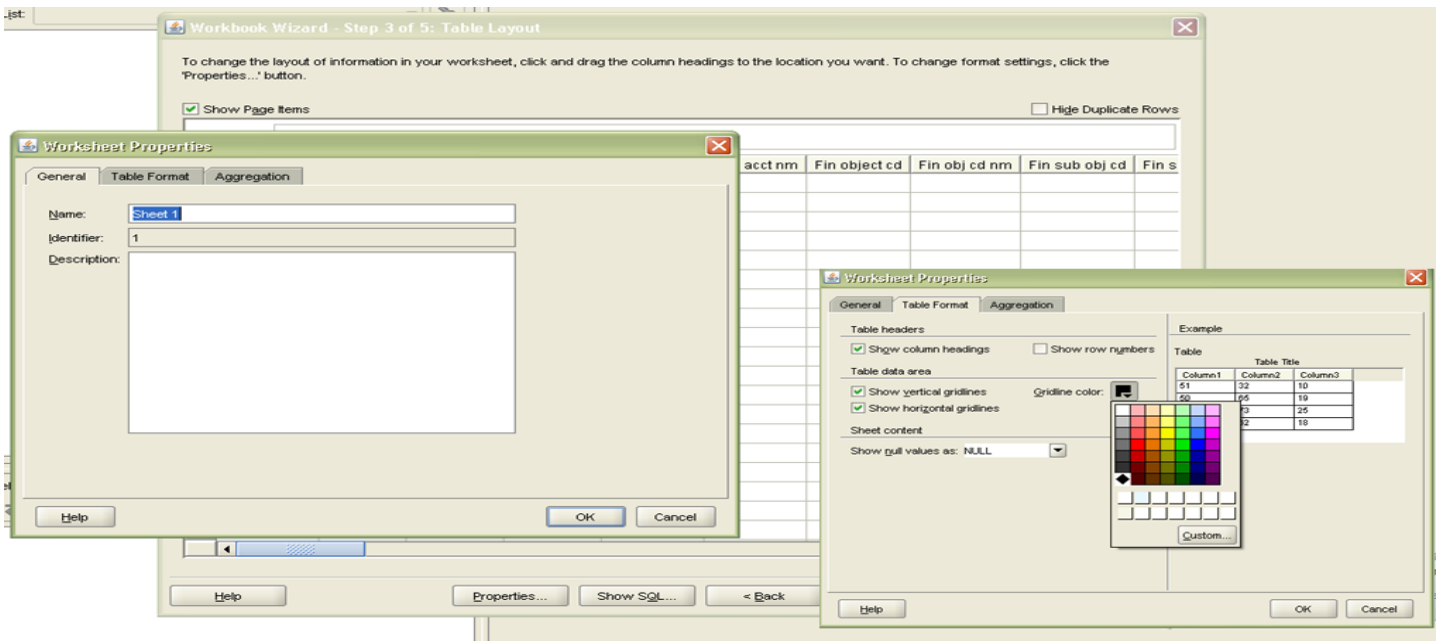
3. The next box that appears will allow you to add items to your worksheet (Step 2 of 5). Click on the (+) symbol next to any folder to reveal all available fields.
  - a. The box on the left shows what is Available, and the box on the right shows what is Selected.
  - b. To add items to your worksheet, 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

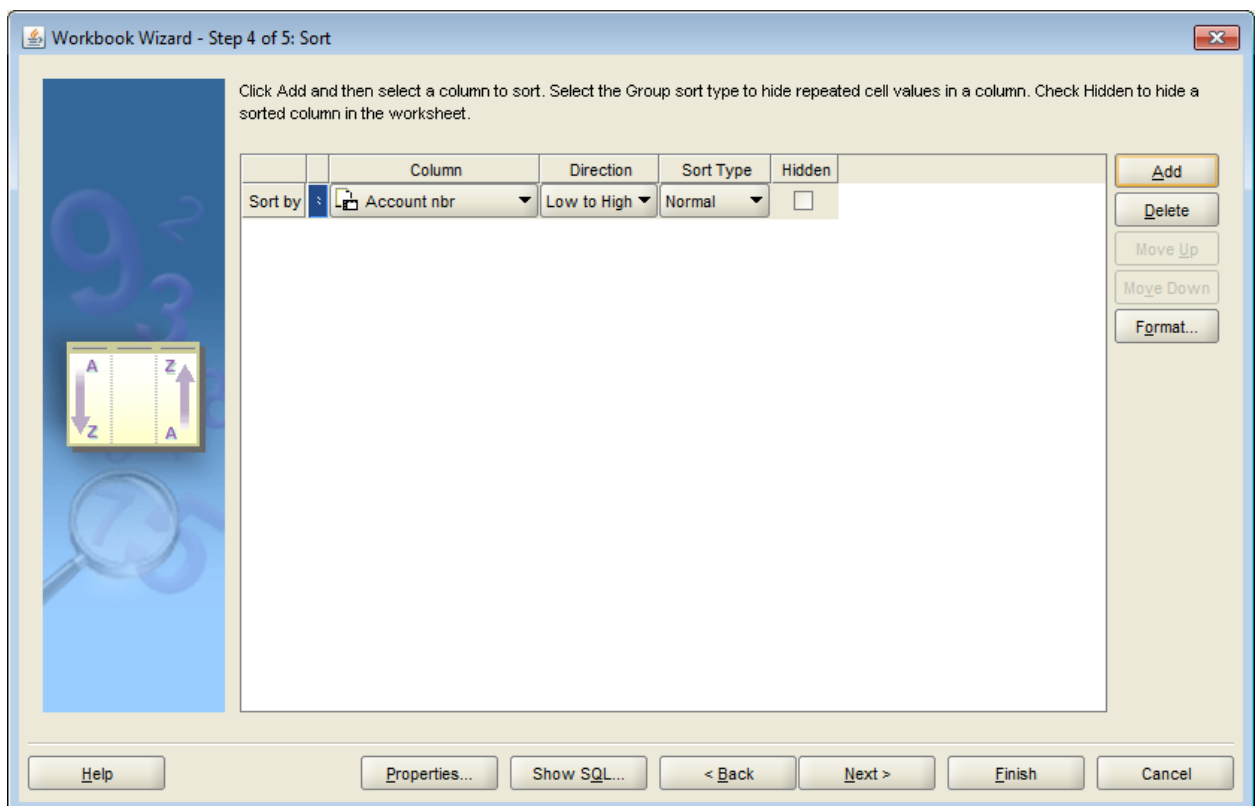
4. In the next box you can change the layout information in the worksheet by dragging the column headings to the location you want (Step 3 of 5). To change format settings, click the ‘Properties...’ button.



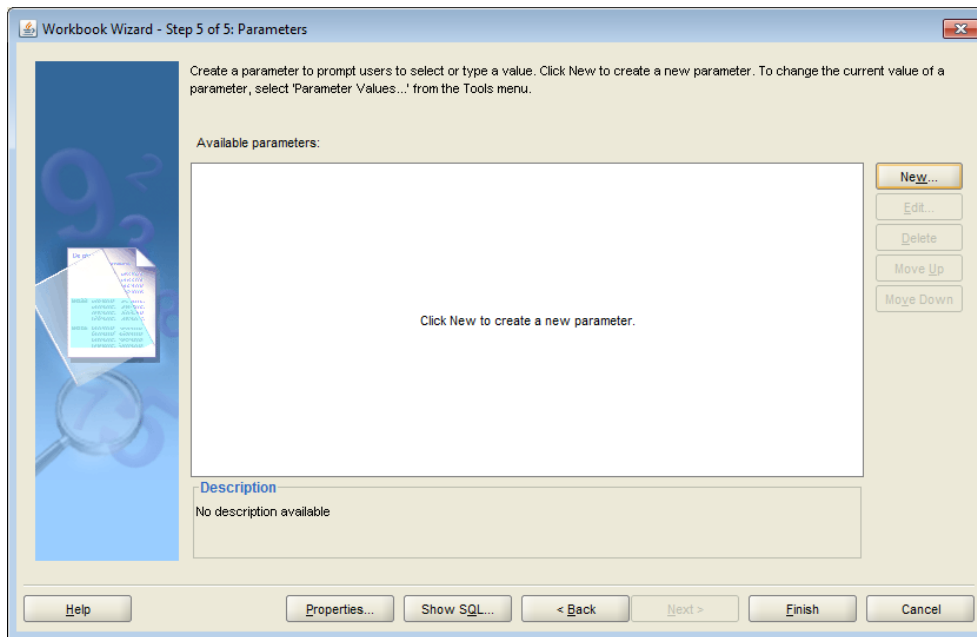
- a. By selecting the Properties button you are able to do the following:
  - i. General Tab: Name the Worksheet
  - ii. Table Format: changes/shows gridlines or to show column headings and or row numbers
  - iii. FYI: the properties can be changed and adjusted at any time – even after the workbook is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



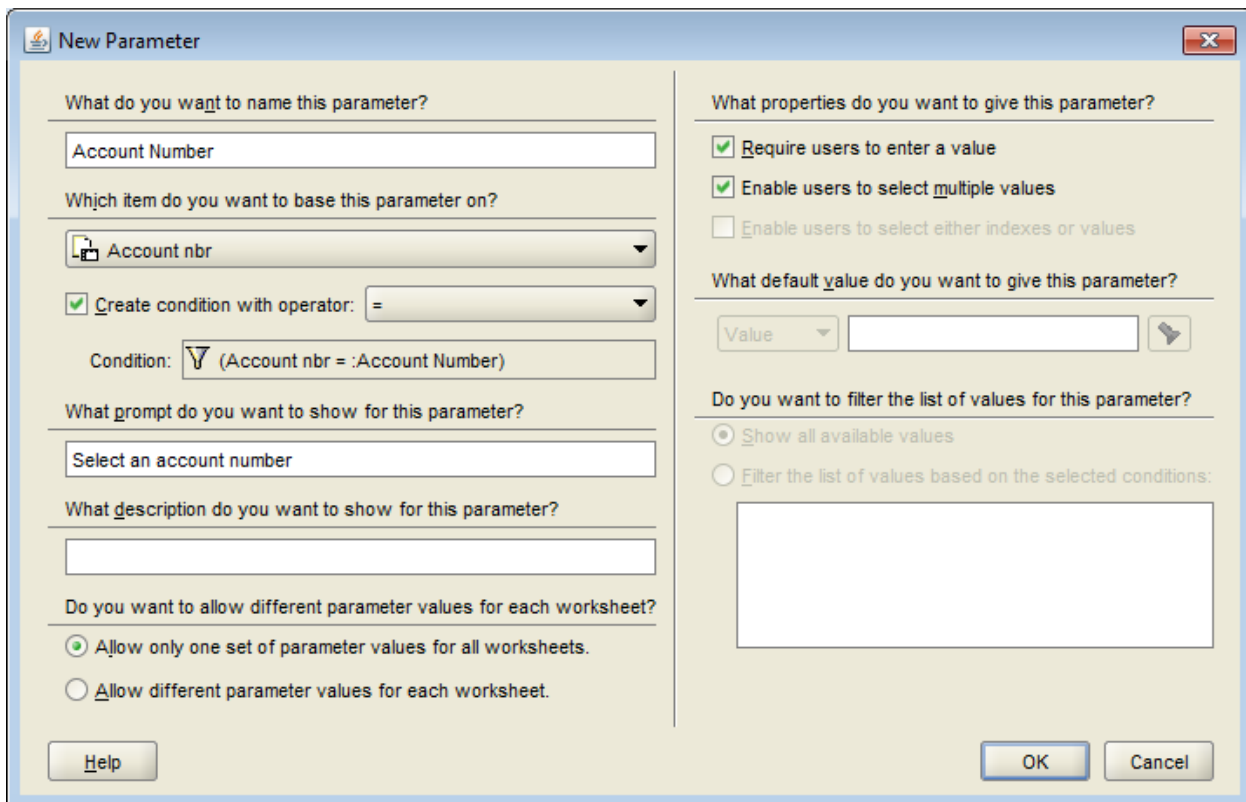
5. In the next step you can select a column to sort, by clicking the “Add” button and selecting the column (Step 4 of 5).
  - a. Sort Options: Add, Delete, Move Up, Move Down, and Format. Once you have them listed above (added), you can re-arrange them by sort preference. Highlight the item and click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



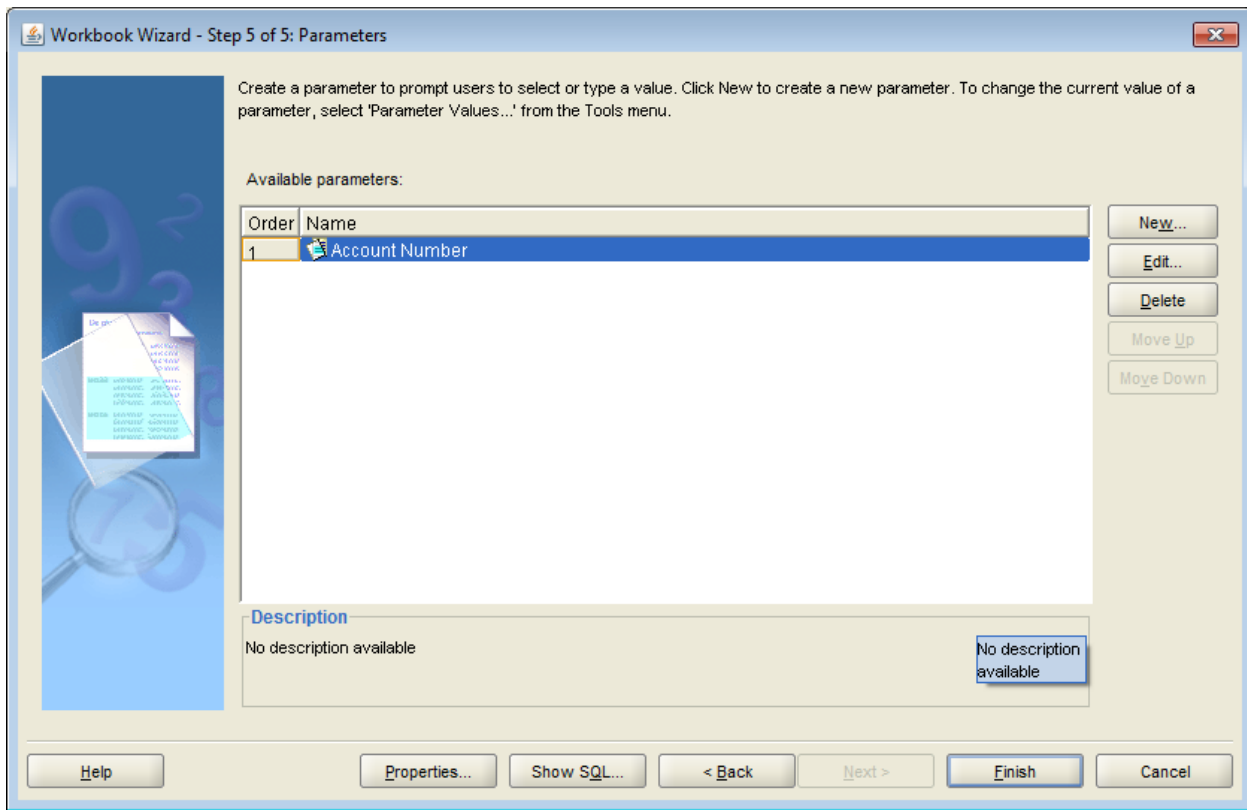
6. In the next step you can create a parameter to prompt users to select or type a value. Click New to create a new parameter (step 5 of 5). To change the current value of a parameter, select “Parameter Values’ from the Tools menu.



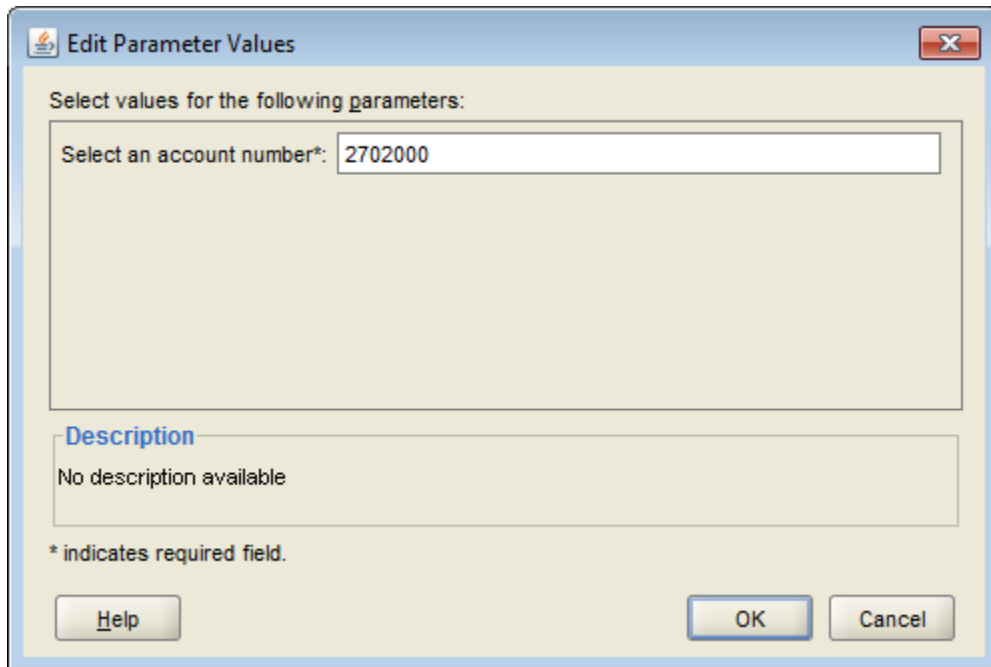
- a. Create a parameter for account number 2702000, then click ok.



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 | 4302          | 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 | 4302          | 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?  
 Value

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.

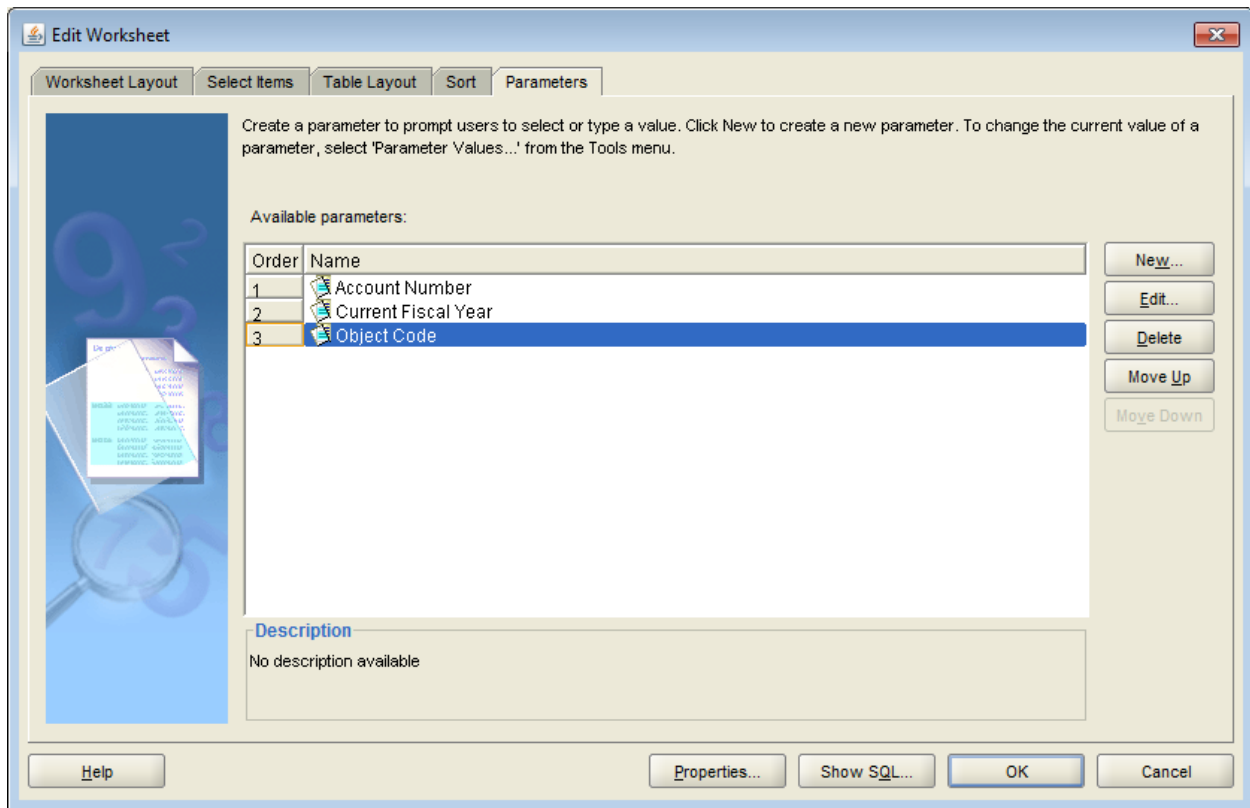
What properties do you want to give this parameter?  
 Require users to enter a value  
 Enable users to select multiple values  
 Enable users to select either indexes or values

What default value do you want to give this parameter?  
 Value

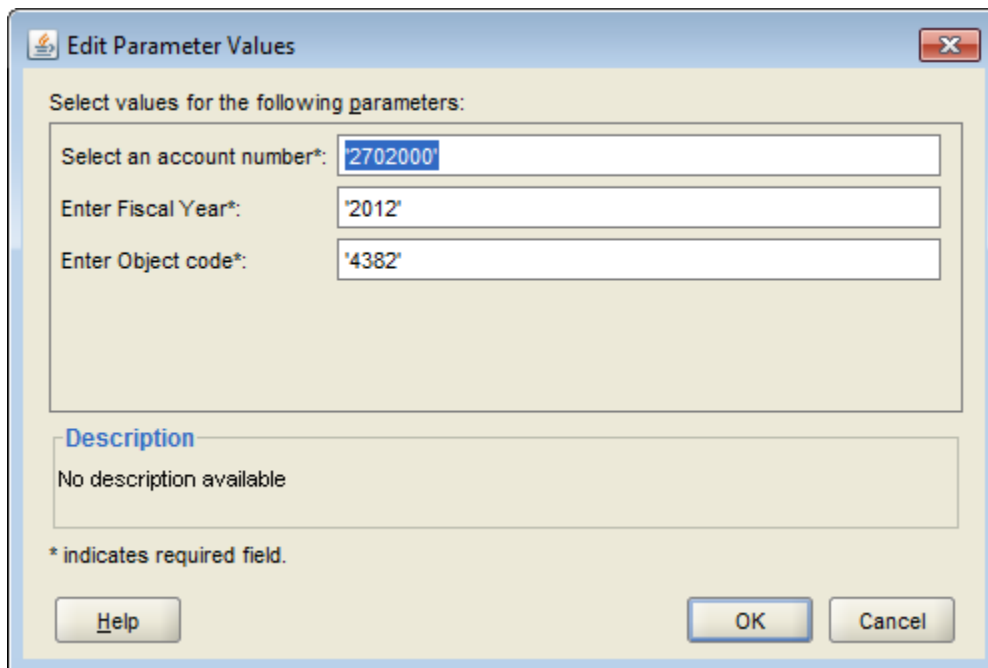
Do you want to filter the list of values for this parameter?  
 Show all available values  
 Filter the list of values based on the selected conditions:

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