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Introduction

What are FMS E-Reports?

- A collection of pre-defined reports that are linked to, and used for, retrieving data from the FMS Data Mart. All pre-defined reports are created using Discoverer Plus.
- Data elements appear in columns and rows using Discoverer Viewer,
- The application is used inside of the Internet Explorer Web browser.
- E-Reports provides a self-serve, just-in-time reporting environment that can be run as often as needed.
- E-Reports provides a portable approach for viewing administrative data on the Web.

Note: E-Reports = Workbook/Worksheet

Note: E-Reports is intended to replace other reporting methods such as BAR for FMS. All data for E-Reports is being drawn from the FMS Data Marts/Banner database.

What is Discoverer Viewer?

Discoverer Viewer is an easy-to-use query and reporting tool that uses standard Web technologies. All of the usual facilities of your Web browser are available:

- Able to create a favorite entry for quick access to worksheet/workbook reports.
- Use of the Back and Forward buttons in the browser to navigate.
- Use of the Browser Print function for print output.
- Report data can be converted to other formats, such as Excel, for further analysis.

What are the Benefits of Using Discoverer Viewer?

In addition to browser functionality, Discoverer Viewer users:

- Will not have to install additional software.
- Will have faster access to Wayne State University’s FMS reporting data.
- Will have the ability of entering selected items when a report is run.
- Can retrieve scheduled report results.
- Can print reports.
- Can control the time that a query runs. If a query is still running when the time limit is reached, the query is automatically terminated.
- Will have a query run time estimate displayed. If the query is predicted to take longer than a predefined time limit, Discoverer Viewer warns you with a message box and allows you to determine if the query should be run. (The default is 60 seconds).
- Will be able to cancel a query at any time during the run process.
Prerequisites for Using Discoverer Viewer

This class is intended for anyone who wishes to view previously specified reports.

In order to use Discoverer Viewer effectively, you must:

- Have access to the Internet.
- Have a valid WSU Access ID.
- Have a security profile established for FMS Data Mart access.
- Have working knowledge of Internet Explorer.

Getting Support

Contact your School College Division Technical support group

OR

Contact the C&IT Help Desk for technical assistance:

Mon-Fri. 8 am – 8 pm
Helpdesk@wayne.edu
313-577-4778

OR

Contact the Data Access Team (DAT) at DAT@lists.wayne.edu or by phone at 313-577-6600

System Requirements

For the latest system specifications, go to:

http://support.wayne.edu

- Click the link “General Information” in the Latest News heading as shown in Figure 1a.
- Click the link “Administrative Desktop Computing Standards” as shown in Figure 1b. This Web site contains the downloads to update your browser.

To find out which version you are using, on the Help menu, click About Internet Explorer.

Note: Users are strongly recommended to use the supported version of Internet Explorer.
Discoverer Dictionary

What is a Data Mart?
A Data Mart is where the data for E-Reports is drawn. This information is derived from the Banner system and is synchronized with the Data Mart each business day.

What are Data Elements?
Data elements are specific and discreet pieces of information in the Banner system / data mart.

What are Views?
Views are collections of data elements that are related in nature; i.e., academic history, admissions, FMS encumbrances, employee identification, etc.

View names tell you what business system information they contain.

- \( P_\) = HR/Personnel
- \( A_\) = Alumni
- \( AA_\) = Alumni
- \( AF_\) = Finance
- \( AR_\) = Student (Financial Aid)
- \( AS_\) = Student
- \( AT_\) = Student (Accounts Receivable)

Note: View = Data Source

What is the Data Dictionary?
- Resource used to look up information that may appear in the worksheet in Discoverer Viewer.
- Provides explanations of the data elements represented in the various reports.
- Provides answers to “What's in E-Reports for FMS” for end users.
- Provides Banner form names, views, and field names and descriptions.
- Appears as a worksheet named DDOO1A in the workbook list.
Section 2
Using *Discoverer Viewer*
in FMS
Accessing Discoverer Viewer

To access Discoverer Viewer:

1. Open the browser (Internet Explorer).
2. Type in the URL to Campus Pipeline as follows:
   http://pipeline.wayne.edu
3. Type Access ID and Password and click OK as displayed in Figure 2a.
4. Select the School Services tab.
5. Select the Administrative Services link as displayed in Figure 2b.
6. Click the Wayne State University E-Reports link.

Note: The page as displayed in Figure 2b will appear. This page will allow you to log in to Discoverer Viewer to run E-Reports for FMS.

Logging In

Note: You must log in under your user name to work with worksheets/reports you have access to. The login screen is the starting point in Viewer as displayed in Figure 3.

To Log In:

1. Type your User Name (Access ID) in the [User Name] field and tab to the next field.
2. Type your Password in the [Password] field.
3. Type DMPROD in the [Database] field. The Language setting will be set according to your browser setting.
4. Click the Connect button. The system will confirm your login.

Note: Each time, the browser is started, you will need to log back into viewer.
Navigating in *Discoverer Viewer* is very similar to navigating on many other web pages. You may use the browser navigation buttons such as Forward, Back, Stop and Refresh. *Discoverer Viewer* also contains hyperlinks for easier navigation as shown in Figure 4. See Table 1 below for descriptions of navigation links.

| New Connection | Click this link to reconnect to Discoverer Viewer. Use this link when you want to login as another user. |
| Open Workbook | Click this link to display the list of available workbooks. Use this link to move back to the beginning of the current workbook. |
| Options | Click this link to specify values for a set of options. Use this link to change how they are displayed in Discoverer Viewer. |
| Exit | Click this link to log out of Discoverer Viewer. Use this link to disconnect from Discoverer Viewer. |
| Help | Click this link to access the online help system. Use this link to get assistance using Discoverer Viewer. |

(Table 1 - Navigation Symbols)

**Using FMS Workbooks/Worksheets**

After logging in to *Discoverer Viewer*, a workbook page will display containing all the workbooks for which you have access as shown in Figure 5a. A workbook acts like a "folder" of worksheets. A workbook contains data that is related in some way, but organized to show different types of worksheets.

Workheets contain the data you want, which allows you to view and share it. Each worksheet is created by a query, which is a question that *Discoverer Viewer* searches the database for to get the data you have requested.

For example, 'show me all transactions that originated in 2001 for the College of Engineering.' A worksheet is also considered to be a report.

Every time you open a database worksheet, *Discoverer Viewer* queries the database to get the most current data.

**Note:** Most workbooks in E-Reports contain only one worksheet.
Using FMS Workbooks/Worksheets (Cont.)

Which FMS workbook do you want to open?

Workbooks can be selected from a list of available workbooks either from the database or from scheduled workbooks that have already run.

There are two different tabs that contain workbooks:

- **Database Workbooks**
  Results are not stored; you need to query the database to view the latest data.

- **Scheduled Workbooks**
  A workbook that can be run at a predetermined time. The functionality is established by the creator of the E-Report.

To Open an FMS workbook/worksheet:

1. Click the link for the workbook/worksheet you wish to view as shown in *Figure 5a*.

To Select a different FMS worksheet:

1. Click the Open Workbook icon as shown in *Figure 5b*. This will take you back to the workbook list page.
2. Click the worksheet link you want to view.

To Open two or more FMS worksheets:

1. Display the results of the first worksheet.
2. **Right click** the Open Workbook icon.
3. Select **Open Link in New Window** as shown in *Figure 5c*.
4. Select the worksheet you want to open.
5. The second worksheet will be displayed in a new browser window as shown in *Figure 5d*.
6. Repeat steps 2 to 5 for each additional worksheet you want to open.
Using FMS Workbooks/Worksheets (Cont.)

Filter

Use the Filter text field, as shown in Figure 5b, to refine the list of displayed workbooks.

To Filter a workbook list:

1. Type the search parameters in the Filter text field to display all the workbooks that match that criteria.
2. Click the Filter button. The Filter is case sensitive.

The 'filtered' list that is displayed will include all workbooks that contain the criteria entered in the Filter text field.

Note: Wildcards " * ? % " etc. are unnecessary and should not be used in the filter. The filter only searches for the name of the workbook and not the contents.

The number of workbooks found of the total number of workbooks available is indicated in parentheses next to the Show All button as shown in Figure 5e.

To Show All items in a workbook list:

1. Click the Show All button to display all database and scheduled workbooks as shown in Figure 5f.

Selecting Parameters

Parameters provide a way to define the data that is presented in an E-Report, very similar to the use of search criteria. Examples would be specifying School code, Home Department code, timeframe of data to include, etc.

Most E-Reports provide one or more parameters that will allow you to refine the data that is gathered into the resulting report.

After selecting the desired worksheet, the parameter page will display as shown in Figure 6. Parameters define the precise data that you want to see in a worksheet. Each worksheet will have its own set of parameters. One of the benefits of Discoverer Viewer is that parameters may be revised after a query is completed.

To apply parameters to the current worksheet, choose any of the following options below:

1. Select values from list boxes. To select multiple items that are not listed next to each other, hold down the Ctrl key while making your selection.
2. Select values from the drop-down lists (use shift and up/down arrow keys),
3. Type a value into a text box.
4. Click the Apply Parameters button to run the query.

Note: The OPAL Detail Transactions by Orgn Report was used throughout this job aid, based on frequency of use in centralized departments. See Appendix A for other report parameters.
Running a Query

After clicking the **Apply Parameters** button, the Query Progress page may display as shown in **Figure 7a**.

When running a query that takes longer than the designated threshold, the Query Estimate Page will display as shown in **Figure 7b**. The default threshold is 60 seconds, but this can be changed in the **Options** section under the **Query Governor** link.

The Query progress may be displayed under the following conditions:

- When a query runs for more than two seconds
- Running a new query
- Rerunning a query
- Changing page items
- Changing the layout.

When a query is running, a series of steps are displayed as shown in **Figure 7a**.

A symbol for each step is displayed in the table below:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>In process</td>
</tr>
<tr>
<td>✔️</td>
<td>Successful completion</td>
</tr>
<tr>
<td>✗</td>
<td>Cancelled</td>
</tr>
</tbody>
</table>

*(Table 2- Query Process Symbols)*

You will find the following links on the query progress page.

**If the page doesn’t update automatically**, ‘click here’ – this may be necessary if your browser does not update automatically, or is configured so that it will not update automatically.

**Cancel this query** – this link cancels the query currently running.

When the query process has completed, the results of the worksheet will be displayed as shown in **Figure 7c**.

Click the ‘**Continue to run the query**’ link if you wish to run the query as shown in **Figure 7b**.

If the message ‘**The data for this sheet has not yet been queried**’ is displayed, this indicates that your queries are not set to run automatically.

**To rerun a Query:**

1. Click the **Rerun Query** link under the worksheet header as shown in **Figure 7c**.

---

**Query Progress**

- ✔️ Peceting Run Time **(00:00:37)**
- ✔️ Running Query
- ✔️ Fetching Data
- 🔄 Sorting Data
  - Building Sheet
  - Complete

If this page doesn’t update automatically, **click here**.

**Cancel** this query.

*(Figure 7a - Query Progress page)*

**Query Estimate**

This query is estimated to take 64 seconds.

**Continue to run the query**

This warning is displayed whenever a query exceeds 60 seconds. To change the value, click Options.

*(Figure 7b – Query Estimate page)*

**Worksheet displays the query results**

**Note:** The OPAL Detail Transactions by Orgn Report was used throughout this job aid, based on frequency of use in centralized departments. See Appendix A for other report parameters.
Examining the FMS Worksheet Display

Once your query has completed, the data retrieved from the FMS Data Mart is displayed. When the worksheet returns the data that answers the query, the items you chose appear in the Data Area as either a Table or a Cross Tab (depending on how the worksheet was created by the report writer). See Figure 8a.

The worksheet contains several sections:

| Section A | This section contains several activities that can be performed on the currently displayed worksheet. This area also allows you to edit your parameters for the current worksheet. |
| Section B | This section contains the report title, date/time stamp, and the data source for the worksheet. The data source refers to the view that is defined in the data dictionary. There are also page navigation hyperlinks to move between several pages of the current worksheet. |
| Section C | This section displays the results of your query. Most worksheets are displayed in table format which contain: |
|  | Column—Displays information vertically. |
|  | Row—Display information horizontally. |
|  | Data Cell—Display the smallest piece of information within the worksheet. |

Axes

The worksheet has up to three axes on the worksheet. An axis is a direction on a sheet. Items that you choose for your query appear in the axes.

The three axes are as follows:

- **Page axis**, appearing above the top axis.
- **Top axis**, running horizontally across the top of the sheet.
- **Side axis**, running vertically along the side of the sheet (applies only to cross tabs which are not that common)

In a table, items can only appear in the top axis or page axis. See Figure 8b for examples. In a cross tab, items can appear in any axis.

Table

This layout type arranges items in columns and rows. Items appear in the top axis. A table is typically used to list all information that fits the query criteria, such as financial transactions for the last month.

Cross Tab

This layout type arranges items in rows and columns. Items appear in both the top and side axes. A cross tab is typically used to display summary information and show how one items relates to another, such as sales by region or by month. A cross tab is sometimes called a matrix.

**Note:** The OPAL Detail Transactions by Orgn Report was used throughout this job aid, based on frequency of use in centralized departments. See Appendix A for other report parameters.
Rearranging Column Order

**Note:** Changes to the column headings and layouts are only effective for the current login session. All worksheets will display their previously designed format after logging out. To make your changes permanent, contact a Designer to create your desired worksheet.

1. Position your mouse pointer over the gray column heading (column handles) until the four-way arrow appears as shown in Figure 9a.
2. Drag the heading to the new location and drop it as shown in Figure 9b.
3. The query will rerun to display the headings new location as shown in Figure 9c.

Moving Through Multiple Pages

**View Pages**

Where more than one page of data is returned, view pages by clicking the page links as displayed in Figure 10.

To go directly to a specific page, click in the Go to page text box, type a page number, and then click the Go button.

**Rows Per Page**

Click this link to go directly to the ‘Options rows per page’ section where you can set the number of rows you wish to display on each page. The default setting is 25 per page.

*Note: The Achievement Report was used throughout this job aid, based on frequency of use in centralized departments. See Appendix A for other report parameters.*
Discoverer Viewer allows you to mark a workbook/worksheet for quick access using a shortcut known as a Favorite.

Internet Explorer uses the term Favorites in reference to bookmarks. The Favorite will allow you to return to the workbook/worksheet without re-entering your search parameters.

**To Add a Favorite:**
1. Query the desired workbook/report.
2. Click the Favorites button and a list of favorites will appear on the left side of your browser window.
3. Click Add and click OK.
4. Go to the Favorites Menu and a drop down list of your favorites will appear as shown in Figure 11a.
5. Click Add to Favorites and click OK as shown in Figure 11b.

**To Edit existing Favorites (Figure 11c):**
1. Go to the Favorites Menu and click Organize Favorites.

**To Rename existing Favorites:**
1. Click the Rename button to change the name of a favorite.
2. Type in the new name for the favorite and press Enter.

**To Create a new folder to organize Favorites:**
1. Click the Create Folder button.
2. Type in the name for the new folder and press Enter.

**To Move an existing Favorite:**
1. Click the desired favorite and hold the mouse button down.
2. Drag the mouse up or down to the desired location.
3. Click the Move to Folder button and then select the folder you want to move to and click OK.

**To Delete a Favorite:**
1. Highlight the favorite and then click delete.

**Note:** If you are not logged into Discoverer Viewer when running a book-marked worksheet, you will be prompted to type your password. The username, database and search parameters are saved with the bookmark. Type in your password and click the Connect button as shown in Figure 11d.
Table/Cross Tab Layout

The Table/Cross Tab Layout page allows you to edit the layout of the Table or cross tab in your worksheet. Each possible location of each item is represented by a drop-down list.

To change the layout of the report table:
1. Click the Table Layout link under the worksheet header.
2. Select the item that you want to appear at each location from the relevant drop-down list (or leave it blank),
3. Click Apply.

Page Items

If the item appears in the Page Item box on the page axis, it is called a page item. A page item enables you to view the data in a sheet from a particular perspective.

For example, you might want view a worksheet by YTD (Year to Date) Activity instead of Fiscal Year as displayed in Figure 12.

To Apply a page item value to a worksheet.
1. Select a value from the list of available values in the item drop-down list.

Axis Items

An item that appears in one of the axes is called an axis item.

Note: An item can only appear on the worksheet once. All items contained in the worksheet must be displayed.

Apply and Reset

When you are satisfied with the layout of your worksheet, click Apply. If you want to restore the drop-down lists to their original values, click Reset. The Reset button only resets the changes for the current session.

Note: Changes to the column headings and layouts are only effective for the current login session. All worksheets will display their previously designed format after logging out.

Setting Presentation Options

The Presentation Option page displays various checkboxes that allow you to turn on and off various settings in Discoverer Viewer as shown in Figure 13.

To View the Presentation Options:
1. Click the Presentation Options link under the worksheet header.
2. Make the desired changes and click on Apply.

Note: The changes made in the Presentation Options page will be permanent. The changes are attached to your login and not the browser.
Printing

To Print a displayed worksheet:
1. Click the Printer Friendly Version link under the worksheet header. The worksheet/report will display in the browser as displayed in Figure 14a.
2. Select View, Text Size, Smallest.
This setting allows reports to print successfully in landscape or portrait mode on a single page.

In order to preview and print E-Reports using Internet Explorer when in the Printer Friendly Version apply the following settings as shown in Figure 14b.
2. Set the Orientation to Landscape.
3. Change the Left and Right Margins to .25.

To Print an FMS report (Figure 14c):
1. Choose File, Print from the menu bar.
2. Select the Layout Tab.
3. Select Landscape as the Orientation setting.
4. Click the Apply button and then click the Print button.

Note: All results of query will be printed with the worksheet. When printing from the worksheet display page, you will only see 25 records on one page. To print all pages, you will have to print each page individually. You may also print preview the report by choosing File, Print Preview. The orientation can be changed from Landscape to Portrait by choosing File, Page Setup.

Exporting Data to Other Applications

You can open worksheet reports in a variety of formats using other applications. This process is called Exporting. The worksheet is sent over to the new application exactly as it was set up with all the data defined in the worksheet. See Appendix C on page 22 for other export formats.

To Export an FMS worksheet/report:
1. Click the Export Data link under the worksheet header. The Export Data page will be displayed as shown in Figure 15a.
2. From the export format drop down list, select the format you want to use. The behavior that follows depends on the external applications specified for the file type.
3. Choose the CSV (Comma delimited) format and click the Export Data button.
4. From the File Download dialog box, select Save this file to disk and click OK as shown in Figure 15b.
5. The Save As dialog box appears where you would then specify the location to save the file to.

Note: Classes are available on using external applications such as Excel. Contact Training and Development at 7-2111 for more information.
Setting System Options

Discoverer Viewer has a range of settings you can specify via the Options link located under the worksheet header of the displayed worksheet.

Query Governor Link

The Query Governor option helps you set limits on the amount of time a query should take to complete. Use this option to limit the time you wait for Discoverer Viewer to run a query. The option sets time and size limits on data as it is being retrieved from the database.

Note: Do not make changes to the Query Governor until you are comfortable with Viewer and your worksheets will display.

The Query Governor in the option section is shown in Figure 16b.

- Warn me if predicted query time exceeds:
  When requesting data for a worksheet, Discoverer estimates the time required to complete the query. Select this option if you want a message to warn that the query will take a long time to complete. The message appears only if the estimated completion time exceeds the period you specify, in MM:SS format, for this option (M=Min. and S=Second).

- Prevent queries from running longer than:
  Select this option to limit the time a query runs before it is cancelled. A warning message informs you if the query exceeds the set time, then Discoverer cancels the query. Normally, this option is selected if server performance is an issue because long running queries might affect server performance.

- Limit retrieval query data to:
  This option sets the maximum number of rows to retrieve for a query. If the database contains more than that number of rows for the query, a message informs you that not all data is retrieved and, consequently, the displayed data might not be complete.

- Retrieve data incrementally in groups of:
  Set this option when the database contains large tables with many rows that might take a long time to retrieve. With an entry made here Discoverer retrieves rows of data in increments rather than all at the same time. The smaller the number of rows to retrieve as a group, the faster the initial retrieval. The default size of the data group is 100 rows, which equates to the first 10 pages of data at 10 rows per page. You can set the number of rows per page under the Worksheets heading.

- Cancel list-of-values retrieval after:
  Some large lists of values take a long time to retrieve from the database, such as a list of 20,000 transactions. If you don’t want to wait for Discoverer to retrieve these larger lists of values, type the amount of time for Discoverer to retrieve lists before canceling. This option does not cancel Discoverer’s retrieval of the actual data for a query.
Setting System Options (Continued)

Worksheet Link (Figure 16c)

Number of rows per page:
Worksheet data is displayed on a page-by-page basis. This sets the maximum number of rows of data that can be displayed on a page.

Show null values as:
Where no data is returned for a field in a worksheet, you can define here how the data is displayed. For example, if you type ‘zero’ in this field, worksheets will display ‘zero’ where no data is returned. The default for the item is blank.

Show values that cannot be totaled (aggregated) as:
When a worksheet tries to aggregate an item that cannot be aggregated (for example, rank), you can define here how the data is displayed. For example, if you type ‘N/A’ in this field, worksheets will display the text ‘N/A’ where the data cannot be aggregated.

Logging Out

To Log Out:
1. You are automatically logged out of Discoverer Viewer when you close your browser session.

OR

2. Click the Exit button located in the top right corner of the browser page. This will take you to the login page as displayed in Figure 17.

Note: To ensure the security of the data, you should log out of Viewer if you plan to leave your computer unattended and/or the system unlocked. The system will time-out for inactivity after 30 minutes.
Congratulations

You should now be able to perform the following:

➤ Navigate using Discoverer Viewer
➤ Execute Discoverer Viewer inquiries / run FMS E-Reports

With these skills you will be able to use FMS E-Reports efficiently and effectively. While these skills are fresh in your memory, be sure to apply them as soon as possible when back at your computer.

If you would like to practice the skills you learned in class, we have created a training environment called the sandbox. To use the sandbox, log into Discoverer Viewer at pipeline.wayne.edu. Feel free to perform whatever functions you wish in this training session. You cannot harm any data while working in the sandbox.

➤ Username Trainxx
➤ Password Trainxx
➤ Database DMTRNG6
(xx = 2 digit number from 01-30)

If you are using Banner 5, you can obtain access for Discoverer Viewer E-Reports by contacting security@wayne.edu. If you do not have access to Banner 5 at this time, you will need to request both Banner 5 and E-Reports access.

Thank you for all your time and effort!

For additional help, remember to contact the C&IT Help Desk or the Data Access Team (DAT).
Section 3
FMS Appendix
<table>
<thead>
<tr>
<th>FMS BAR #</th>
<th>Old FMS Report</th>
<th>E-Report for FMS#</th>
<th>New FMS E-Report</th>
<th>Parameters</th>
<th>View Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAR001A</td>
<td>Chart of Indexes by Index within SCD</td>
<td>FMS001A</td>
<td>Chart of Indexes by Index within SCD</td>
<td>SCD Rollup Code</td>
<td>af_chart_of_index, af_grant_balances</td>
</tr>
<tr>
<td>BAR001C</td>
<td>Grant Index</td>
<td>FMS001C</td>
<td>Grant Index Report</td>
<td>SCD Rollup Code</td>
<td>af_chart_of_index</td>
</tr>
<tr>
<td>BAR001D</td>
<td>Chart Level Reference</td>
<td>FMS001D</td>
<td>Chart Level Reference</td>
<td>SCD Rollup Code</td>
<td>af_chart_of_index, af_grant_balances</td>
</tr>
<tr>
<td>BAR003A</td>
<td>Comparative Operating Stmt by Fund TYP SCD</td>
<td>FMS003A</td>
<td>Comparative Operating Stmt Report</td>
<td>SCD Code, Fiscal Year, Fiscal Period</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>BAR004A</td>
<td>GL Detailed Transactions by Fund</td>
<td>FMS004A</td>
<td>GL Detailed Transactions</td>
<td>Fund Code, Fiscal Year</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td>BAR004B</td>
<td>GL Summary</td>
<td>FMS004B</td>
<td>General Ledger Summary</td>
<td>Fund Code, Fiscal Year</td>
<td>vf_yearly_balance_sheet</td>
</tr>
<tr>
<td>BAR005</td>
<td>OPAL Detail Transactions by ORGN</td>
<td>FMS005</td>
<td>OPAL Detail Transactions by ORGN</td>
<td>Fiscal Year, Fiscal Period, Orgn Code, Account Code</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td>BAR005A</td>
<td>OPAL Detail Transactions by Fund</td>
<td>FMS005A</td>
<td>OPAL Detail Transactions by Fund</td>
<td>Fiscal Year, Fiscal Period, Fund Code, Account Code</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td>BAR005B</td>
<td>OPAL Detail Transactions by Fund/ORGN</td>
<td>FMS005B</td>
<td>OPAL Detail Transaction by ORGN &amp; Fund</td>
<td>Fiscal Year, Fund Code, Orgn Code, Account Code</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td>BAR005C</td>
<td>OPAL Detain Trans by Fund ORGN w/Period</td>
<td>FMS005C</td>
<td>OPAL Transaction by Fund/ORGN &amp; Period</td>
<td>Fiscal Year, Fiscal Period, Fund Code, Orgn Code, Account Code</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td>BAR006A</td>
<td>Account Statement Summary for SCD</td>
<td>FMS006A</td>
<td>Account Summary Report</td>
<td>Fiscal Year, Fiscal Period Value for SCD</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>BAR006C</td>
<td>Account Code Summary RPT by Fund</td>
<td>FMS006C</td>
<td>Account Code Summary Report</td>
<td>Fiscal Year, Fiscal Period Fund</td>
<td>af_period_operating_statement</td>
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<tr>
<td>BAR006D</td>
<td>Acct Code Summary Rpt Data Enterable</td>
<td>FMS006D</td>
<td>Account Code Summary Report by Data Enterable Fund</td>
<td>Fiscal Year, Fiscal Period, Fund Code, Orgn Code</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>BAR006G</td>
<td>Rollup Summary of Acct Codes by Fund</td>
<td>FMS006G</td>
<td>Rollup Summary of Account Codes</td>
<td>Fiscal Year, Fiscal Period, Fund Code</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>FMS BAR #</td>
<td>Old FMS Report</td>
<td>E-Report for FMS#</td>
<td>New FMS E-Report</td>
<td>Parameters</td>
<td>View Name</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------------------------</td>
<td>-------------------</td>
<td>-----------------------------------------------</td>
<td>-----------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>BAR006H</td>
<td>Acct Code L1 Summary</td>
<td>FMS006H</td>
<td>Account Code Level 1 Summary Budget Balance</td>
<td>Fiscal Year, Fiscal Period, Fund Code</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>BAR006I</td>
<td>Boardline Rpt by Fund/Orgn/Prgm/Locn</td>
<td>FMS006I</td>
<td>Boardline Report by Fund/ORGN/Prgm/Locn</td>
<td>Fiscal Year, Fiscal Period, Orgn Code</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>BAR006K</td>
<td>Rollup Boardline</td>
<td>FMS006K</td>
<td>Rollup Boardline Report</td>
<td>Fiscal Year, Fiscal Period, Orgn Code</td>
<td>af_period_operating_statement</td>
</tr>
<tr>
<td>BAR007A</td>
<td>Research Accounting Summary</td>
<td>FMS007A</td>
<td>Research Accounting Summary</td>
<td>Grant Code</td>
<td>af_grant_balances</td>
</tr>
<tr>
<td>BAR007B</td>
<td>Research Project Acct Detail Tran</td>
<td>FMS007B</td>
<td>Research Project Acct Detail Transactions</td>
<td>Grant Code</td>
<td>af_grant_budget_detail_trans</td>
</tr>
<tr>
<td>BAR007C</td>
<td>Project Budget End Date info L3 Orgn</td>
<td>FMS007C</td>
<td>Project Budget End Date</td>
<td>SCD Rollup Code, Budget End Date</td>
<td>af_chart_of_index</td>
</tr>
<tr>
<td>BAR007D</td>
<td>IDC Alloc Mon Totals by Grant Fund</td>
<td>FMS007D</td>
<td>Indirect Cost Allocation Monthly Totals by Grant Fund</td>
<td>Fund, Fiscal Year, Orgn Code</td>
<td>vf_fgbtrnh_lc_adj, vf_frrgrmc_his</td>
</tr>
<tr>
<td>BAR007F</td>
<td>Grant Code Summary</td>
<td>FMS007F</td>
<td>Grant Code Summary</td>
<td>Grant Code</td>
<td>af_grant_balances, af_chart_of_index</td>
</tr>
<tr>
<td>BAR008A</td>
<td>Commitments by Fund/Orgn</td>
<td>FMS008A</td>
<td>Commitments by Fund/Orgn</td>
<td>Fiscal Year, Fund Code, Orgn Code</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td>BAR008B</td>
<td>Commitments by Fund/Orgn/Account Code</td>
<td>FMS008B</td>
<td>Commitments by Fund/Orgn/Account Code</td>
<td>Fiscal Year, Fund Code, Orgn Code, Account Code</td>
<td>af_transaction_detail</td>
</tr>
<tr>
<td></td>
<td>FMSSUP1</td>
<td></td>
<td>Account Code and Title Listing</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
# Appendix B – SCD Codes (School College Division Codes)

<table>
<thead>
<tr>
<th>Organization Code</th>
<th>Description</th>
<th>Organization Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01LIB</td>
<td>Libraries+Lib+Info Sci Program</td>
<td>37VPGV</td>
<td>VP Government+Community Affairs</td>
</tr>
<tr>
<td>02EDU</td>
<td>College of Education</td>
<td>40UPS</td>
<td>University Public School</td>
</tr>
<tr>
<td>03CLA</td>
<td>College of Liberal Arts</td>
<td>42FPM</td>
<td>Facilities Planning+Management</td>
</tr>
<tr>
<td>04FPA</td>
<td>College Fine, Performing+Comm Arts</td>
<td>43BOP</td>
<td>Business Operations</td>
</tr>
<tr>
<td>04ENGG</td>
<td>College of Engineering</td>
<td>46PS</td>
<td>Public Safety</td>
</tr>
<tr>
<td>06MED</td>
<td>School of Medicine</td>
<td>47IA</td>
<td>Internal Audit</td>
</tr>
<tr>
<td>07LAW</td>
<td>Law School</td>
<td>48LR</td>
<td>Labor Relations</td>
</tr>
<tr>
<td>08MS</td>
<td>Mortuary Science</td>
<td>49HR</td>
<td>Human Resources</td>
</tr>
<tr>
<td>09VPRE</td>
<td>Office VP for Research</td>
<td>52UP</td>
<td>University Press</td>
</tr>
<tr>
<td>10HPE</td>
<td>Health and Physical Education</td>
<td>66ULM</td>
<td>College Urban, Labor+Metro Affairs</td>
</tr>
<tr>
<td>12SCI</td>
<td>College of Science</td>
<td>69RES</td>
<td>Research Support</td>
</tr>
<tr>
<td>13SSW</td>
<td>School of Social Work</td>
<td>73COS</td>
<td>Executive VP and Chief of Staff</td>
</tr>
<tr>
<td>15NUR</td>
<td>College of Nursing</td>
<td>740SP</td>
<td>Off of Strategic Planning+Analysis</td>
</tr>
<tr>
<td>16BUS</td>
<td>School of Business Administration</td>
<td>75UB</td>
<td>University Budget</td>
</tr>
<tr>
<td>18PAH</td>
<td>College Pharm+Allied Health Prof</td>
<td>76EEO</td>
<td>Equal Employment Opportunity</td>
</tr>
<tr>
<td>19AHP</td>
<td>Allied Health Professions</td>
<td>78WC</td>
<td>Women’s Commission</td>
</tr>
<tr>
<td>20CLL</td>
<td>College of Lifelong Learning</td>
<td>82FO</td>
<td>Fiscal Operation</td>
</tr>
<tr>
<td>24MS</td>
<td>Media Svcs</td>
<td>86VPDA</td>
<td>VP University Advancement</td>
</tr>
<tr>
<td>25VPCT</td>
<td>Vice President for C+IT</td>
<td>87VPMC</td>
<td>VP Marketing+Communications</td>
</tr>
<tr>
<td>30SECR</td>
<td>Secretary of the University</td>
<td>88VPGC</td>
<td>VP+General Counsel</td>
</tr>
<tr>
<td>31PRES</td>
<td>Office of the President</td>
<td>92VPSA</td>
<td>VP for Student Dev+Campus Life</td>
</tr>
<tr>
<td>32PRO</td>
<td>Provost+Sr. VP for Acad Affairs</td>
<td>98CA</td>
<td>Central Accounts</td>
</tr>
<tr>
<td>33VPFA</td>
<td>Sr. VP Finance+Administration</td>
<td>99RES</td>
<td>Central Reserves</td>
</tr>
</tbody>
</table>
## Appendix C – Discoverer Viewer Export Formats

<table>
<thead>
<tr>
<th>Export Format</th>
<th>File Extension</th>
<th>Associated Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Excel Workbook</td>
<td>.XLS</td>
<td>Microsoft Excel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Microsoft Access</td>
</tr>
<tr>
<td>Hypertext Markup Language</td>
<td>.HTM</td>
<td>All products in the Microsoft Office Suite</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Internet Explorer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Any application that views html code</td>
</tr>
<tr>
<td>Text</td>
<td>.TXT</td>
<td>All products in the Microsoft Office Suite</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Word Pad</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note Pad</td>
</tr>
<tr>
<td>Comma Delimited</td>
<td>.CSV</td>
<td>Any application that views ASCII text</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Microsoft Excel</td>
</tr>
<tr>
<td>Formatted Text</td>
<td>.PRN</td>
<td>Microsoft Excel</td>
</tr>
<tr>
<td>Data Interchange Format</td>
<td>.DIF</td>
<td>Microsoft Excel</td>
</tr>
<tr>
<td>Symbolic Link</td>
<td>.SLK</td>
<td>Microsoft Excel</td>
</tr>
<tr>
<td>Lotus 1-2-3</td>
<td>.WKS</td>
<td>Lotus 1-2-3 (Lotus’ spreadsheet program)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Microsoft Excel</td>
</tr>
</tbody>
</table>
Appendix D – Using Internet Explorer

Microsoft’s Internet Explorer is called a Web Browser, which allows you to browse the Web and Web enabled applications. The address of a “page” on the Internet is called a URL (Uniform Resource Locator). When browsing the World Wide Web, it is a good idea to bookmark interesting pages so that you can visit them later.

Navigating in Internet Explorer

When viewing a Web site, interesting graphics and words may contain links to other pages. Words containing links are underlined and by resting the mouse on the text, a pointing hand will be displayed; this indicates a hypertext link. Graphics can also be links; they are called hypermedia links.

If a link has been followed, it is colored differently – usually purple – to allow you to keep track of pages you have visited. Use the Back and Forward buttons to move between pages.

<table>
<thead>
<tr>
<th>Internet Explorer Components</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Bar</td>
<td>The name of the Web site you are currently viewing and the title of the program (Microsoft Internet Explorer).</td>
</tr>
<tr>
<td>Control Menu</td>
<td>A menu that can be used to close the program.</td>
</tr>
<tr>
<td>Pull Down Menu Bar</td>
<td>A bar which has pull down menus, used to access features of Microsoft Internet Explorer.</td>
</tr>
<tr>
<td>Toolbar</td>
<td>A row of buttons that substitute for widely used menu items.</td>
</tr>
<tr>
<td>Address</td>
<td>The current address of the Web site shown on screen. To move to a different Web site, click in the Address field and alter the address. An Internet address is called a URL (Uniform Resource Locator).</td>
</tr>
<tr>
<td>Minimize, Restore and Close</td>
<td>Buttons used to increase (maximize) the size of a window, return a window back to its original size (restore), and reduce a window to an icon (minimize).</td>
</tr>
<tr>
<td>Status Bar</td>
<td>When moving to a new Web site will display the status on locating the page.</td>
</tr>
</tbody>
</table>
Appendix D – Using Internet Explorer (Continued)

The toolbar buttons that are available in Internet Explorer can vary depending on the plug-ins that may be installed within the browser. The Back and Forward buttons both have pull down menus to allow you to move to previously visited pages in a non-linear fashion.

<table>
<thead>
<tr>
<th>Button Image</th>
<th>Button Name</th>
<th>Button Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Moves you back to the previous page you were viewing.</td>
<td></td>
</tr>
<tr>
<td>Forward</td>
<td>If you had just clicked the Back button, you can click the Forward button to move back to the page you were originally viewing.</td>
<td></td>
</tr>
<tr>
<td>Stop</td>
<td>Stops loading any data or the URL you are currently dialing into.</td>
<td></td>
</tr>
<tr>
<td>Refresh</td>
<td>Refreshes the current page you are viewing.</td>
<td></td>
</tr>
<tr>
<td>Home</td>
<td>Displays the service providers site page or the designated home page.</td>
<td></td>
</tr>
<tr>
<td>Search</td>
<td>Allows you to search the Internet for a topic.</td>
<td></td>
</tr>
<tr>
<td>Favorites</td>
<td>Contains URL’s for your favorite pages for quick future access.</td>
<td></td>
</tr>
<tr>
<td>History</td>
<td>Allows you to quickly access recently visited sites.</td>
<td></td>
</tr>
<tr>
<td>Mail</td>
<td>Allows you access to your email or newsgroup accounts.</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>Prints the current Web site.</td>
<td></td>
</tr>
<tr>
<td>Discuss</td>
<td>Allows you to access Internet discussion groups.</td>
<td></td>
</tr>
</tbody>
</table>
Appendix E – Discoverer Viewer Frequently Asked Questions

1. Q How often is the Data Mart refreshed for Discoverer Viewer?
   A Data is refreshed after the last business day.

2. Q How often does the system time out for inactivity?
   A The system will time out after 30 minutes of inactivity.

3. Q How do I know what security I will have in Discoverer Viewer?
   A Your Banner security governs your security in Viewer.

4. Q Why can’t we use the URL to get to Discoverer Viewer?
   A The official way to access Discoverer Viewer is through campus pipeline, if the URL changes, you could have
     bookmark an obsolete URL.

5. Q When adding a bookmark (favorite) does it keep a snapshot of the data from the time that you saved it?
   A No, it only allows you to save the report with the parameters that were used when it was run.

6. Q When running a report using a bookmark (favorite), do you have to login to Viewer?
   A Yes, when running a report from a bookmark (favorite), you will be prompted to type your password. Your
     username and database will be saved with the bookmark.

7. Q Can you sort the data on the worksheets?
   A No. However, you can report the data to Excel and sort it from there.

8. Q Can you explain why when I print my worksheet, it only prints the first 25 rows?
   A You must click on the Printer Friendly version link first in order to print all results of the query.

9. Q Why does the workbook have only one worksheet?
   A Most of the workbooks only have one worksheet. When selecting a workbook with multiple worksheets, you
     will be taken to a page to select the desired worksheet. When you select a workbook that only has one
     worksheet, you will be taken directly to the parameter page.

10. Q Before printing a worksheet, can you print preview it?
    A Yes, however, you must have Internet Explorer 5.5 Service Pack 2. If you do not have this version, visit
        support.wayne.edu. You will find a link to download the supported version of the software.

11. Q Can you create multiple bookmarks for the same worksheet?
    A Yes. You can create multiple bookmarks with different search parameters. The parameters are saved with the
        bookmark and not the data.

12. Q I already have access to Banner. Will I automatically get access to Viewer?
    A No. You will need to request access based upon you need for creating focused reports. Once your access to
        Viewer is setup, it is based upon your security profile from Banner. To get access to Banner or Viewer, email
        the security office at security@wayne.edu.