



## HOW TO USE DISCOVERER VIEWER STUDENT REPORTS



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## **TABLE OF CONTENTS**

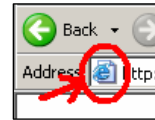
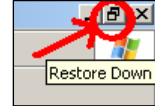
Initial Setup .....	1
Using Discoverer Viewer .....	2
Exporting To Excel From Viewer .....	6
Miscellaneous Excel Tips .....	7
Information on Macros.....	7
Search and Select Box.....	7
Exporting Data to MS Access or MS Word.....	9
FEEDBACK.....	10



## INITIAL SETUP

For the first time using Viewer

1. Using Internet Explorer, go to <https://reports.mtu.edu/discoverer/viewer>
2. Optional: You can create a shortcut in your shortcuts folder or on your desktop
  - a. To make the shortcut on your desktop, Restore Down your browser window by clicking on the Restore Down button and then resize the window (if necessary) to see your desktop behind the window.
  - b. Click and drag the “e” next to the address in the address bar to your shortcuts folder or your desktop
  - c. Rename your new shortcut by right clicking on it, then go to “Rename”
  - d. You can now maximize your Internet Explorer window by clicking on the Maximize button that is located where the Restore Button used to be.
3. Click on “Discoverer Viewer V2” in the left frame. A new window will open.
4. Click on the “Create Connection” button (on the right side of the page).
5. When the next page comes up, fill in the appropriate fields



### Connection Name and Description

Connection Name: Discoverer – Prod (or another name if you'd like)  
Connection Description: (an optional description of your connection)  
Locale: Local set in user's browser

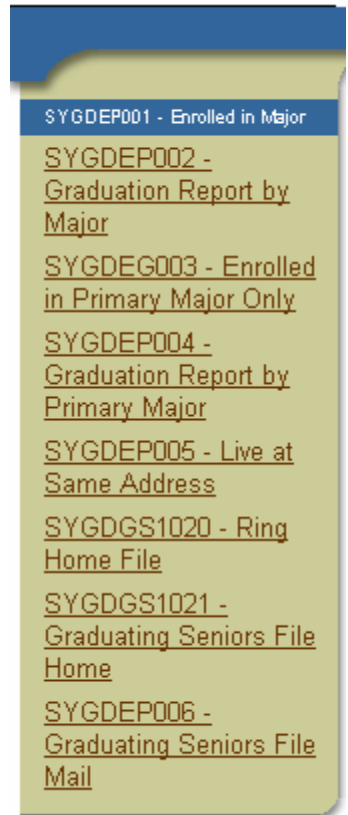
### Database Account Details

User Name: (Your BANNER user name)  
Password: (Your BANNER password)  
Database: Prod

6. Click the Apply button in the lower right frame. It will return you to the connect page with Discoverer Viewer.
7. Click on the name of the connection (Discoverer – Prod) that you set up in step 5 to verify that it is available.
8. Type in your BANNER password and click “Connect”. Discoverer Viewer will now load and you will see a listing of reports available to you.
9. Go to step 5 in the “Using Discoverer Viewer” section (Page 3) of this documentation.

## USING DISCOVERER VIEWER

1. Go to <https://reports.mtu.edu/discoverer/viewer>
2. Create your connection, if already created go to step 3
3. Click on the name of the connection that you made during the initial setup ("Discoverer – Prod")
4. Type in your BANNER password and click "Go". Discoverer Viewer will now load and you will see a listing of workbooks available to you. (Please note that if you do not do anything in Viewer for a period of time, Viewer will ask you to re-login.)
5. Select the workbook that you would like to open by clicking on the name of the workbook.
  - a. If you know the name or part of the name, enter it in the search field and click the GO button (or press enter on your keyboard).
6. The names of the worksheets will appear in the upper left hand corner. The name of the worksheet that you are working on is the one that is highlighted. If you want to view a different worksheet, click on the name of that worksheet. In the example to the right, the active worksheet is "SYGDEP001 – Enrolled in Major" and there are seven other worksheets to choose from.
7. If there are any parameters for the report, a page will appear with those parameters, if not, then the results of the report will open. If there are not any parameters, continue to step 10.
8. Fill in the necessary parameters to find the data you are searching for.
  - a. Text box -- Enter the exact information that you are looking for. You may enter multiple items if the prompt or prompt description indicates that multiple items are allowed. Separate multiple items with a comma.



Enter Term Code of Enrollment  Term Code

\*  
Value  
Required

Enter Level Code UG GR or % for Both  Level Code

Enter Major Code ex: BBA  Major Code

\*  
Value  
Required

If a default parameter has not been entered, you'll see the message "\*\*Value Required." If a default has been entered, you can leave it as is or change it to meet your needs.

NOTE: Single quotes are required but will be added automatically by Discoverer. Warning: If you edit a parameter and removed one of the single quotes, you will have to add it back.

- b. List box – Click on the flashlight to add or subtract items from the list (See the “Search and Select Box” section in this documentation for more information)

- c. Wild card boxes – Fill in one of the available options. If you leave all of them blank, then the search will pick up all available values. You may also have the flashlight option for this type of search box.
  - i. Exact – the results are exactly what the search value is. If the description of the parameter indicates that a list of values can be entered, type the list here and separate each item by a comma. Example: 'BBA','BEC','BUS'
  - ii. Starts With – the results will begin with the search value (this is the same as XX\* in IQ or XX% in BANNER). You do not have to add the % wildcard. Example: Type B for all majors beginning with B.
  - iii. Contains – the results will contain the search value (this is the same as \*XX\* in IQ or %XX% in BANNER). You do not have to add the %'s. Example for a major code, typing EM would find EME, MEEM and EMSE. Be sure that the appropriate radio button is chosen. Leaving all the fields blank is the same as entering a % (wildcard).

- d. Range of values – Do not use wildcards. To get all values enter 0 (zero) for the beginning value and ZZZZ for the ending value.

- e. Dates are entered in the format dd-MMM-yyyy. Example: 10-JAN-2004 or 10-Jan-2004 or 10-jan-2004

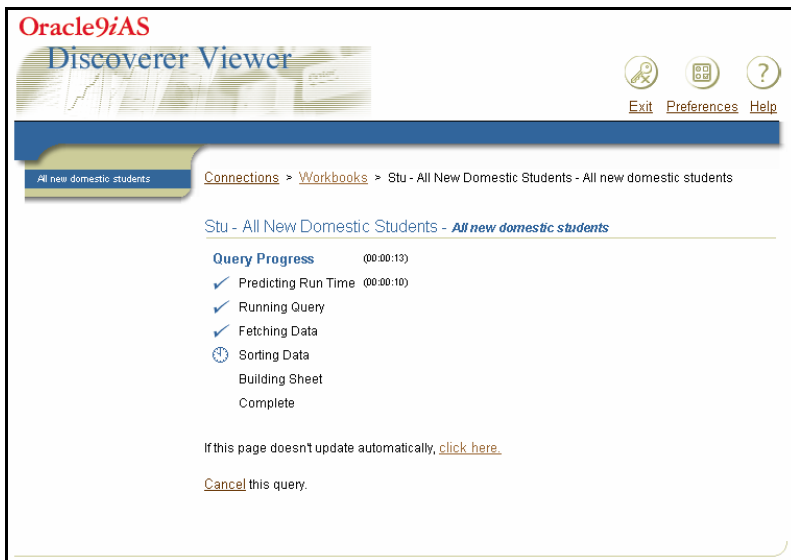
Enter Start Date  DD-MON-YYYY

\*  
Value  
Required

Enter End Date  DD-MON-YYYY

\*  
Value  
Required

10. Once you have filled out the parameters, click on the “Go” button.
11. A screen will appear telling you the current progress of your query. Your screen will flicker (refresh) every few seconds until the results of your report appear.
- a. If you click on the “Cancel this query” link while a query is in progress, the query will cancel but will not give you the option to change the parameters. In order to edit (change) the parameters, you must let the query run to completion, then click on Edit parameters and make desired changes. If you cancel the query and wish to re-run it with new parameters, click on Workbooks and click on the name of your workbook to re-open it.



### **Printing the results of your query**

1. Click on the “Printable Page” button on the left under Actions.
2. Click on Preview sample, then click on Open PDF to view sample.
3. Optional: Click on Page Setup to change printing settings (e.g., to print landscape or portrait). Click “OK” when done.
4. Click on the “Preview sample or Printable PDF button.
5. Choose your printer
6. Click “Print”

### **Exporting the results of your query**

Specific instructions for exporting to Access and Word are located on Page 9.  
Instructions for exporting to Excel are on page 6.

1. Click on the “Export” link located top left under Actions
2. On the next screen, choose the format that you would like to export the report to.
3. Click on the “Export” button.
4. The Export Ready will appear, now click to view or save of the following will occur:
  - a. The results will open in a new browser window. If this occurs, go to File – Save As to save your data
  - b. You will be presented with a dialog box that asks you what you want to do. Choose the “Save” option and save your results, then browse to that location using Windows Explorer and double-click on your new file to open it.

## EXPORTING TO EXCEL FROM VIEWER

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1. First check the macro security settings in Excel.
    - a. Open Excel
    - b. On the menu bar go to: Tools > Macro > Security
    - c. On the "Security Level" tab, the "Medium" option should be selected.
    - d. Click "OK" and exit out of Excel.
    - e. See important note on macros at the end of this document.
  2. Open Discoverer Viewer and run a report.
  3. After running your query, click on the "Export Data" link located near the top of the results screen.
  4. On the next screen, choose Microsoft Excel Workbook (\*.xls).
  5. Click on the "Export Data" button.
  6. Depending on how your computer is configured, one of the following will occur:
    - a. The results will open in a new browser window. If this occurs, go to **File – Save As** to save your data. **NOTE:** It is a good practice to rename the Excel spreadsheet. Viewer will automatically use the workbook name. If you run a second worksheet from that workbook, it will save over your first Excel spreadsheet or if that spreadsheet is still open, it will give you an error message.
- OR
- You will be presented with a dialog box that asks you what you want to do. Choose the "**Save**" option and save your results. At that point you may be given the option to open or close the spreadsheet. Click Open. If you aren't given that option then browse to that location using Windows Explorer and double-click on your new file to open it. **SUGGESTION:** Create a *temp* folder on your home directory for anything that you don't want to save periodically. Then it's easy to periodically delete everything in your *temp* directory.
- b. When Excel opens the sheet, you will be warned that the sheet contains macros. Click "Enable Macros" and the sheet will continue to load.
  7. Discoverer Tables vs. Crosstabs – If the Discoverer Report was a table, there will be one worksheet in Excel. If the Discoverer Report was a crosstab, then there will be three worksheets created in Excel.
  8. For Discoverer Tables and the third worksheet from a Discoverer Crosstab, Viewer inserts the heading of the sheet in the first cell (A1) of the new spreadsheet. In this case, if the title is long, it will make the column width span far across the page. To fix this:
    - a. Select Column A and from the menu bar go to Format > Column > Width.
    - b. Enter a number between 10 and 40 and click "OK".
    - c. With cell "A1" highlighted, from the Menu Bar go to: Format - Cells
    - d. On the "Alignment" tab, select "Wrap Text" and click "OK" (This will cause the title to compact into column A stretching the first row vertically)
    - e. Highlight the cells in the first row starting at A1 to span the width of the data in the sheet. Right click on highlighted cells. Choose Format-Cells.

- On the alignment tab, select “wrap text” and “merge cells” and click OK. Right click on Row 1 and choose row height or stretch the row down via the row heading adjustment.
- f. Center the Title of the sheet.
  - g. Format the report to meet your needs.
9. For Discoverer Crosstabs, the second worksheet in Excel, which will be the first worksheet you see, is a pivot table.
  10. For Discoverer Crosstabs, the first worksheet in Excel shows all of the data from the Discoverer report in columns.

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## **MISCELLANEOUS EXCEL TIPS**

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1. For a longer field heading, split it up by using Alt + Enter in the formula bar. This will force a new line.
2. Double clicking on the lines in the column and row headings (darker area where the actual letters and numbers are located) will automatically size the field to best fit.

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## **INFORMATION ON MACROS**

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Macros are small programs that run inside Excel to perform a series of repetitive actions. For example, you can make a macro that will copy data from one spreadsheet into another, format the sheet in a certain way, and print it out.

Macros can also be used to spread viruses. When you open a spreadsheet that has macros attached, Excel will warn you and give you the option to disable or enable all macros.

The solution: just choose the "disable" option when you open the spreadsheet from an unknown source. Macros from Discoverer Viewer are theoretically safe and are OK to “enable”.

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## **SEARCH AND SELECT BOX**

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The “Search and Select Box” allows the user to select multiple values from a list to be used in the search criteria for a report.

1. Select your items and move them to the “Selected Values” box.
2. Click “Apply” to accept your selected values. (You may need to scroll down to view the “Apply” button).

## Search and Select: PriorCollege

This page enables you to select multiple values from a list.

### Search

To find the value, select a filter option in the dropdown list and enter a word in the text field, then click the "Go" button. To see a list of all values, clear the search box and click the "Go" button.

Search by

Case-sensitive

### Results

Available Values		Selected Values
<ul style="list-style-type: none"><li>001264 - GRAND RAPIDS COMMUNITY COLLEGE</li><li>001293 - GRAND VALLEY STATE UNIVERSITY</li><li>001261 - GLEN OAKS COMMUNITY COLLEGE</li><li>001275 - WHATCOM COMMUNITY CL</li><li>001276 - WHATCOM CMTY COLLEGE</li><li>001293 - HENRY FORD COMMUNITY COLLEGE</li><li>001294 - HIGHLAND PARK C C</li><li>001295 - HILLSDALE COLLEGE</li><li>001300 - SILVER LAKE COLLEGE</li></ul>	<ul style="list-style-type: none"><li>Move</li><li>Move All</li><li>Remove</li><li>Remove All</li></ul>	<ul style="list-style-type: none"><li>000354 - UNIV OF CINCIN - R WALTER COLL</li><li>000534 - ST PAUL TECHNICAL COLLEGE</li></ul>

[Previous](#) 101-150 [Next](#)

## Selecting Items

1. Selecting a single item –
  - a. Click on the item in the list, and then click on the "Move" button (>). You may need to click on the [Next](#) or [Previous](#) links to find the values you are searching for.
2. Selecting multiple items –
  - a. Hold down your "Ctrl" key on the keyboard while clicking on the items. Once they are all highlighted, click on the "Move" button (>). You may need to click on the [Next](#) or [Previous](#) links to find the values you are searching for.
3. Selecting all items –
  - a. Click on the "Move All" button (>>). Note that this only moves the items that are currently visible in the "Available Values" box. You may need to click on the [Next](#) link and then click the "Move All" button (>>) to add all of the available values.

## Searching for specific items

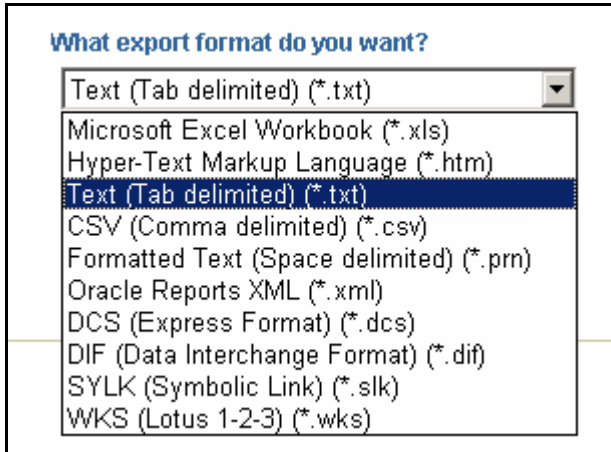
1. Select the "Search by" criteria from the drop-down box
  - b. Contains – the results will contain the search value
  - c. Starts With – the results will begin with the search value
  - d. Ends With – the results will end with the search value
  - e. Is Exactly – the results are exactly what the search value is
2. Type in the value you are searching for in the text box
3. Click "Go". Only the results of your search will be shown in the "Available Values" box.
4. To add your results to the selected values box, follow the directions in the "Selecting Items" section above.

## EXPORTING DATA TO MS ACCESS OR MS WORD

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This section is only necessary if you want to use the data in a mail merge or other application.

1. Run the report and have the results open.
2. Click on the “Export Data” link located near the top of the results screen
3. Choose “Text (Tab Delimited) (\*.txt)” as the format you would like to export the data as.



4. Click the “Export Data” button
5. Depending on how your computer is configured, one of the following will occur:
  - a. The results will open in a new browser window. If this occurs, go to File – Save As to save your data.
  - b. You will be presented with a dialog box that asks you what you want to do. Choose the “Save” option and save your results.
6. If you have previously exported the report, you will be asked if you want to overwrite the file. Say “Yes” if you don’t need a previous version otherwise rename the file.
7. You may now open the report and print or manipulate the file. This file can be used as a data source for a mail merge or imported into MS Access.

