

# KCCD Operational Data Store (ODS) **Discoverer Quick Reference Guide**

## **Presented in 2 Formats:**

1. **Quick Reference Guide** (pages 2-7) includes helpful screen shots to guide you through the login, data retrieval and exporting processes.
2. **Quick Reference Card** (page 8) is a one page summary of the Guide

**Last Updated: January 2013**

## **Recent Additions:**

- Updated login process (page 2)
- Tip: Password synchronization (page 2)
- Tip: Viewing Reports on Screen Easier (page 4)
- Tip: Formatting Problems when Importing to Excel 2007 (page 6)

## **What is ODS vs. Discoverer?**

- ODS (Operational Data Store) is a data base where Banner data is copied and optimized for reporting. The data in the ODS is not 'live' like Banner but it is updated each night.
- Discoverer is a reporting tool used to access the data in the ODS.

# KCCD Operational Data Store (ODS) Discoverer Quick Reference Guide

## Logging into Discoverer:

1. From within an internet browser go to the Discoverer Plus login page at:  
<https://reporting.kccd.edu/discoverer/plus>

**Note:** Please make sure that the pop-up blocker on your internet browser is turned off. (In Internet Explorer, the pop-up blocker toggle is in the *Tools* drop-down menu across the top.)

**Tip:** Add a bookmark to the site so you can easily return. (In Internet Explorer, add a bookmark by selecting *Add to Favorites* in the *Favorites* drop-down menu across the top.)

2. The web address above takes you to the Discoverer Plus Login Screen (Figure 1).

3. Enter your login information.

- a) **Username** - Your user name should match your Banner username (for example, jsmith).
- b) **Password** - If this is your first time logging in, your password should match your synchronized network\Banner\ email password. In some cases, it is set to **CHANGEME**, in which case you will be prompted to change your password.

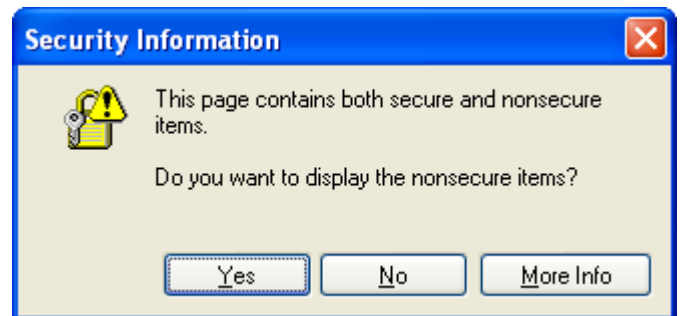
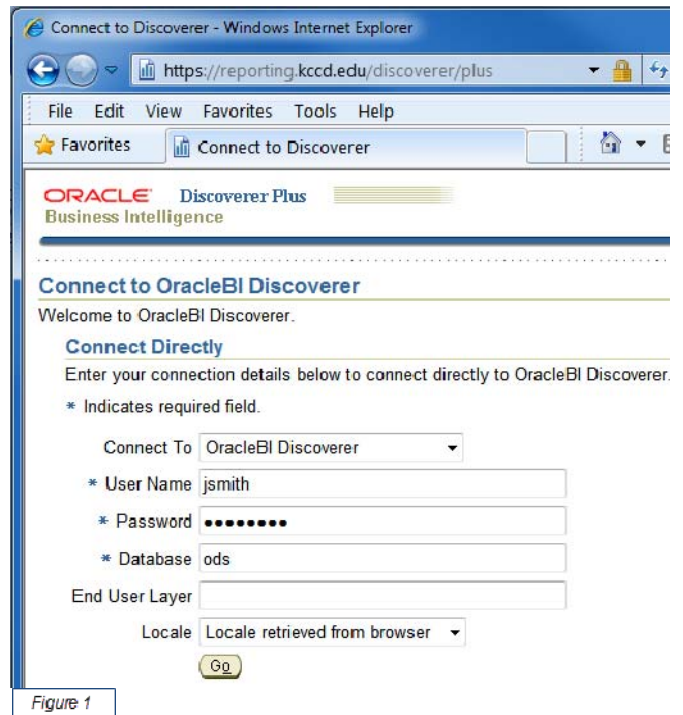
**Tip:** If your passwords need to be synchronized, use the following url:  
<http://uam.kccd.edu/>. This website will synchronize your passwords and/or let you change them.

- c) **Database** - Enter **ODS**
- d) Leave the *End User Layer* blank and do not select a *Locale*.

**Note:** Login information is not case sensitive.

4. Click the **Go** button.

**Note:** During your first login, if your machine doesn't have a Java Runtime Engine, there will be a delay while one is installed. Follow any instructions to complete the process as they appear.



5. Click **YES** when the *Security Information* window appears (see Figure 2).

- Click **YES** if the *Warning - Security* window appears (see Figure 3)
- You are now logged into ODS Discoverer and you will see the *Workbook Wizard* screen (Figure 4)



Figure 3

## Opening a Workbook/Report

- From the *Workbook Wizard* screen (Figure 4), select *Open an Existing Workbook*.
- Click *Browse*
- You will now see the *Open Workbook from Database* screen (Figure 5).

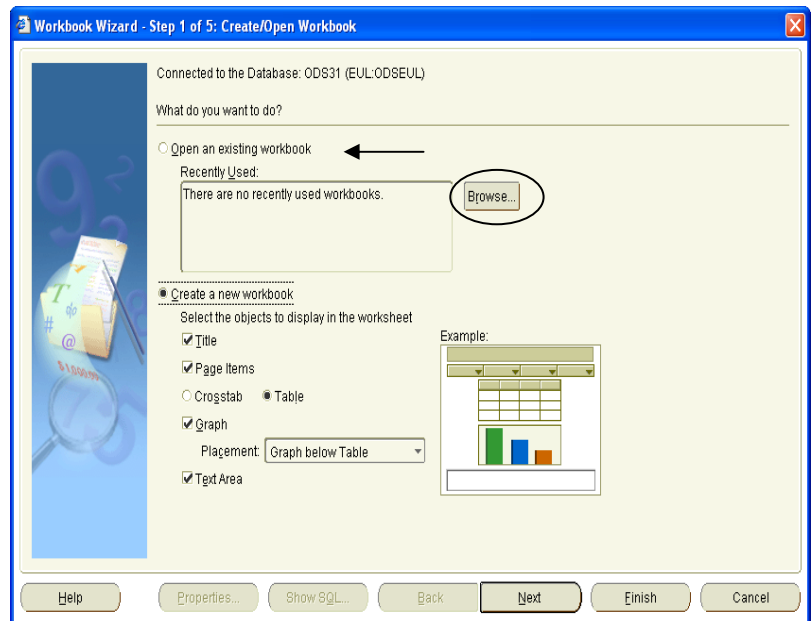


Figure 4

If you do not see a list of names and Business Areas (e.g. Student\_Sched), click the drop-down list next to the icon as indicated in Figure 5 and select *User Tree*.

- Find the Business Area or personal folder in which the report you want to access is located and click the plus sign next to it. This will open a list of workbooks/reports to which you have access.

Note the Name of the Personal Folder or Business Area:

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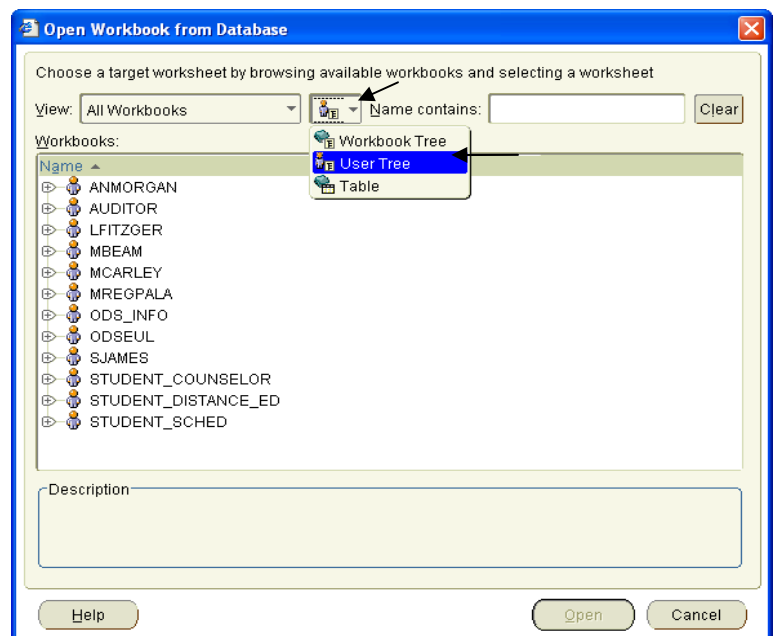


Figure 5

5. Click on the report you would like to access and then click *Open*.

Note the Name of the Report: \_\_\_\_\_

6. If the workbook/report has parameters (filters), you will see the *Edit Parameter Values* screen (Figure 6). Enter the Parameters as requested - they will vary by report. Click *OK* to enter the criteria and run the report. You may get a message indicating how long it will take to run the query and asking whether you want to continue - Click *Yes*.

**Note:** The message indicating the amount of time it will take to run the query is not always accurate.

**Tip:** If there is a flashlight icon next to the parameter (circled on Figure 6), click on it to select options from a list rather than typing in the criteria.

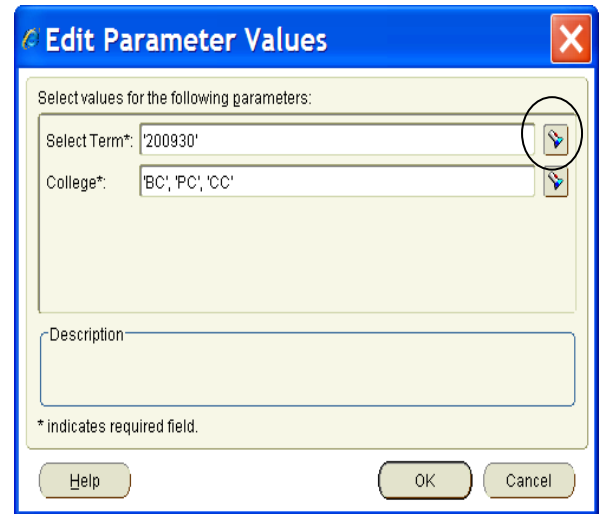


Figure 6

7. If no data is returned or if you want to select new parameter values (ex. a different term), click the arrow button as indicated in Figure 7 to 'refresh' the workbook.

8. Discoverer will only retrieve the first 250 rows of data. If there is more data, you will need to click *Retrieve All Rows* in the *Tools* drop-down menu across the top.

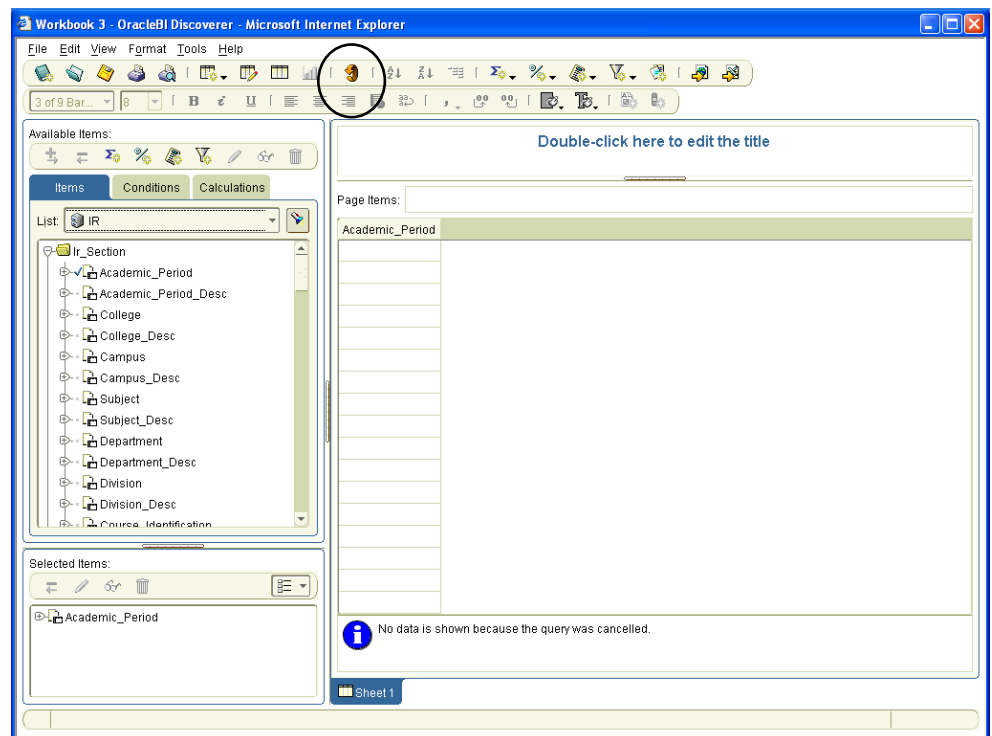


Figure 7

**Tip:** Reports are easier to view if the design panes, in the left portion of the page, are removed from view. This can be done by clicking on the *View* menu across the top and unselecting the first two items - *Available Items Pane* and *Selected Items Pane* as shown in Figure 8. Figure 9 shows the same report viewed in full screen mode.

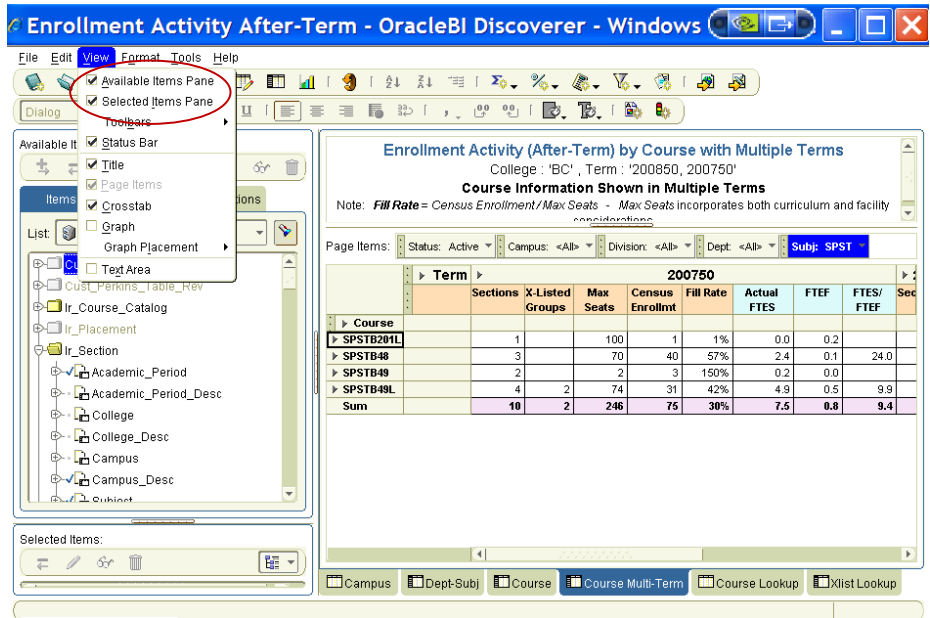


Figure 8

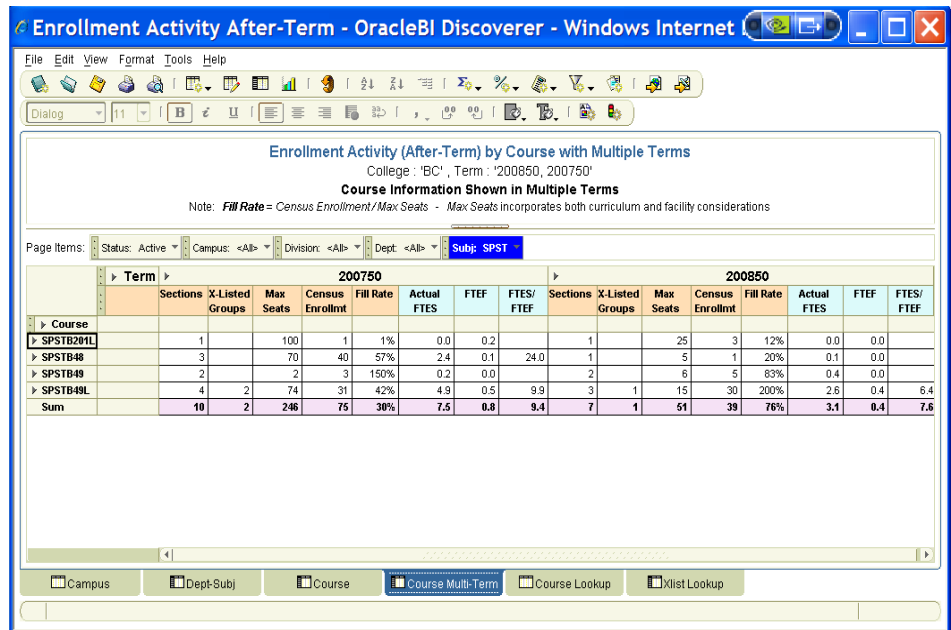


Figure 9

## Exporting Data from Your Discoverer Workbook/Report

1. If you would like to export your data to another program such as Excel, click on *File* across the top and select *Export* (see Figure 10).

**Note:** It's better to select *Export* rather than *Export-to-Excel* because that option allows you to select the name of your data and where to save it.

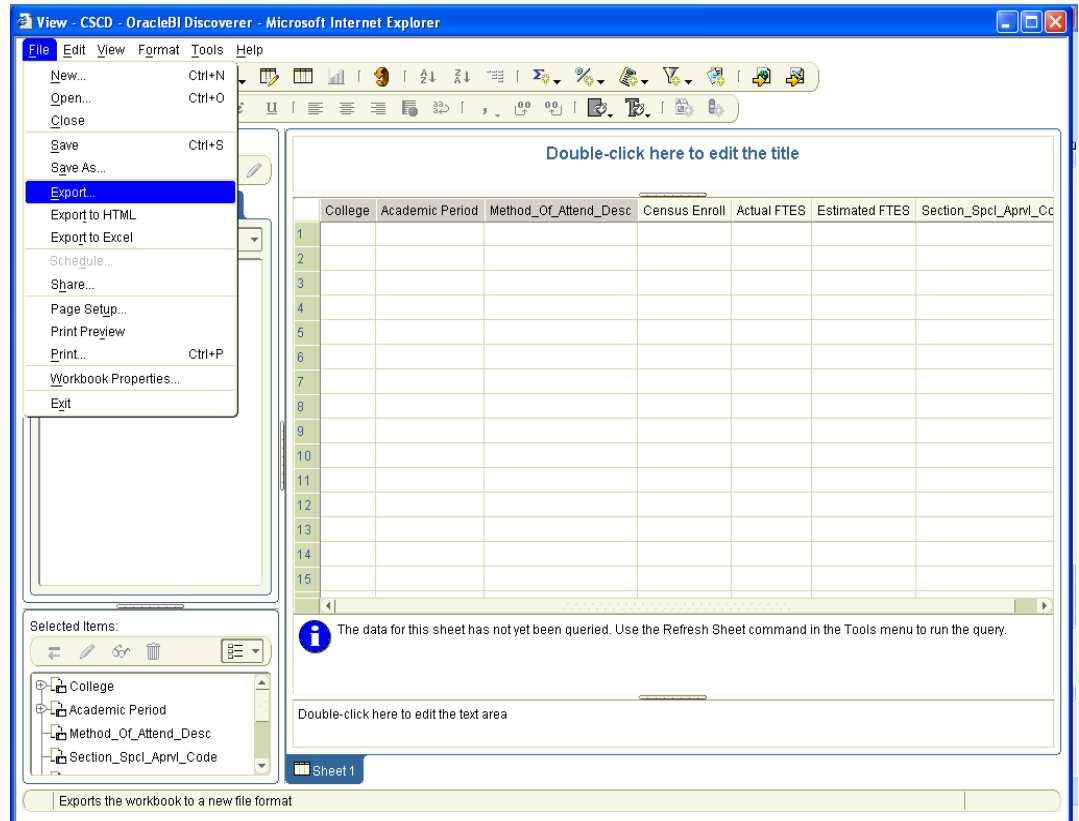


Figure 10

2. You will now see the *Export* wizard which will walk you through 4 steps to export your data.

**Step 1:** Select *Current Worksheet* and click *Next*.

**Step 2 (see Figure 11):** Click *Browse* to select the directory where you'd like to save your data and type in a name for your file.

**Step 3:** Enter the desired parameters (this step may be missing if the workbook/report does not include parameters).

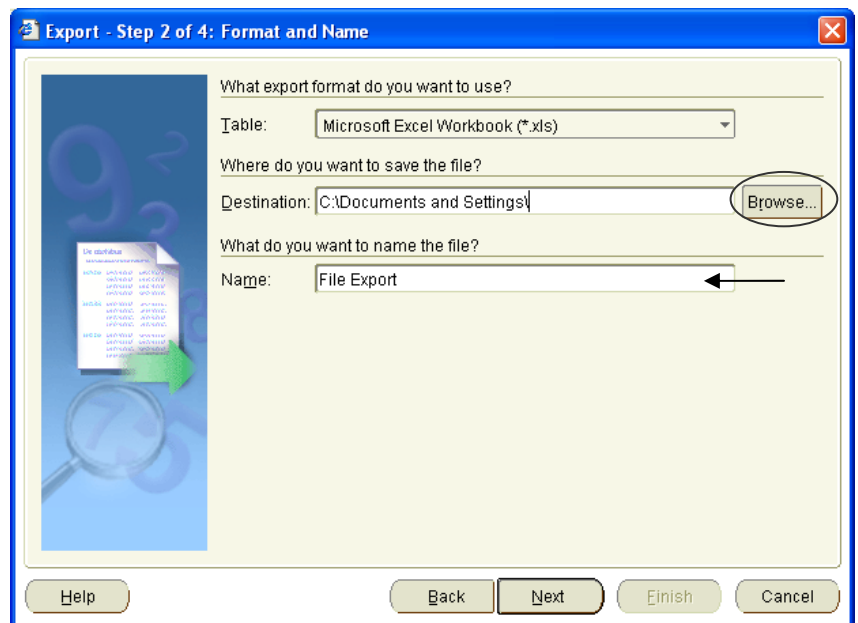


Figure 11

**Step 4:** Select the *Supervised* option and click *Finish*. Once the export is complete, the *Export Log* window will appear to indicate whether the report was successfully exported.

**Tip:** When importing data to Excel 2007, the formatting may not transfer unless you set Excel to enable Macros. You can do this in one of two ways. For both options, click the Office button in the top left and select *Excel Options* (as depicted in Figure 12).

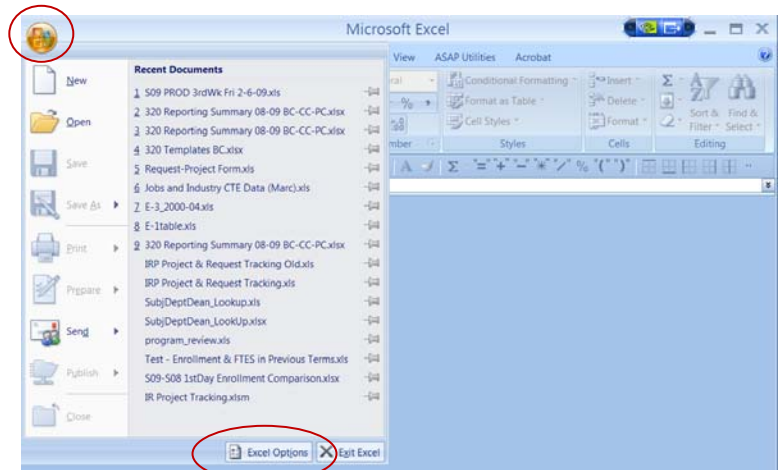


Figure 12

Select the *Trust Center* from the choices on the left in the Excel Options window and then click *Trust Center Settings* (Figure 13).

In the Trust Center, click *Macro Settings* to view the options (Figure 14).

If *Enable All Macros* (fourth choice) is selected, formatting will import automatically.

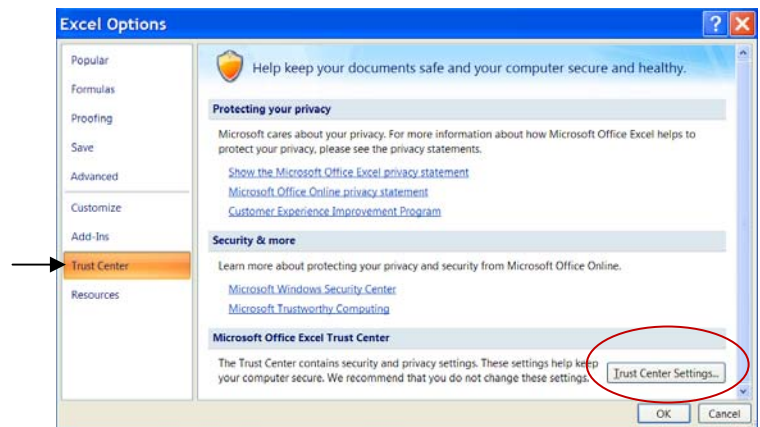


Figure 13

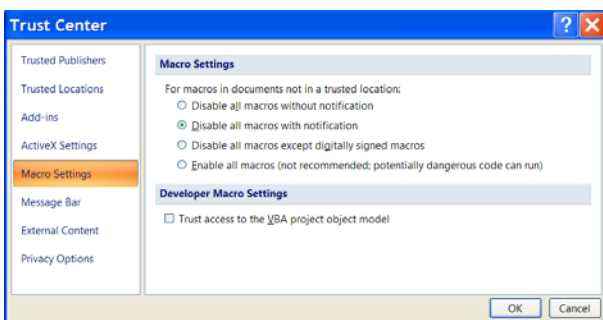


Figure 14

If *Disable All Macros with Notification* (second option) is selected, the file will import without formatting but you will be given an option (Figure 15) to enable the macro. Click on *Options* and select *Enable this Content* and the formatting will appear.

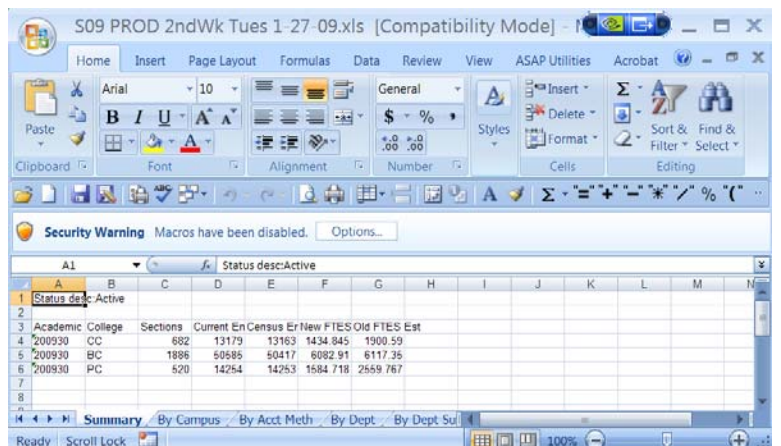


Figure 15

# KCCD Operational Data Store (ODS)

## Discoverer Quick Reference Card

**Site Location:** <https://reporting.kccd.edu/discoverer/plus>

**Login:** User Name = Banner Username (i.e. jsmith, john.smith)  
Password = Your chosen network/Banner/email password  
Database = ODS  
End User Layer = Leave Blank

**Security Information Screen(s):** Answer Yes

### Open Workbook:

1. Click 'Open an Existing Workbook' and Click Browse
2. Select the 'User Tree' view to select reports shared with you from within personal folders (i.e. mbeam) or business areas (i.e. Student\_Sched)
3. Select the report you want to run; Click Open
4. Select/Enter Parameters, if requested (the flashlight icon allows you to choose from a list)

### Retrieving Data:

1. Click the Curved Arrow (refresh) icon across the top
2. Data may be limited to the first 250 lines. Click 'Retrieve All Rows' in the 'Tools' drop-down menu across the top to retrieve all data.
3. Click refresh to change parameter values (i.e. terms)

**TIP:** Hide the design panes to see more data on your screen – click 'View' on the menu bar and unselect the first two items – "Available Items Pane" and "Selected Items Pane"

### Exporting Data:

1. Click the 'File' menu item and select 'Export'
2. Click Current Sheet (or Entire Workbook for all sheets)
3. Select a Destination for your file
4. Enter a Name for your file

**TIP:** When importing to Excel, if formatting is missing, be sure Macro settings are set to enable