Course Manual
for

Discoverer Reports

North Dakota University System
Facilities Management System
FAMIS
Enter your department name and number, please put in your department number, **not your phone number**. Make sure your email address is filled in, not everybody’s email address in the phone book. Fill out and have your department head sign it and send it to Karen at Facilities. We will let you know when you have access to the reports.
CREATING YOUR CONNECTION

You can go to the Facilities Web Page to log-in to the Discoverer Report. Go to the job billing and click on Discoverer View site and your create connection will come up. Once you have received your login and pass word, you will be able to create your connection.

You will then put a short description in the box titled “connection name.” For example, you enter your name as above.

Next, enter your user name, password, and database that were e-mailed to you.

Note: The database will always be “ndfaprd”
Next you click on “apply.” This will create your connection where the reports will be stored.

The connection is stored in the cache of your computer. If you try to retrieve your reports from a different computer, you will need to create a new connection on that PC. If you clear your cache (as many do with PeopleSoft) you will also need to create a new connection.

CHANGING YOUR PASSWORD:

Once you have created you connection, you may go in and change your password if you want. Click on the pencil and screen will come up with account detail on it. Click onto the change password and hit apply.
Enter your old password, and then enter your new password, verify your new password and then hit apply. Your password has been changed.
PREFERENCES

Before you run your report, it is very important to set up your preferences. To do so, click on the Preference button at the top of the page. For the best results, we ask the preferences be set to the following:

*Note: in order for the reports to run correctly, please make sure the Query Governor is set as the following!

When finished, click Apply.
SELECTING YOUR REPORT

Once you have adjusted your preferences, Discoverer will direct you to the List of Workbook screen. On this screen you will choose what report or “worksheet” you’d like to run. The reports we are focusing on would be either of the following:

- NDUS Job Billing-Detail by Export
- NDUS Job Billing Summary by Export Date

To open or run your report, double click on the report name. (In this example, the report used is the NDUS.Job Billing Summary by Export Date). The report may take a few moments to open.
SELECTING YOUR REPORT PARAMETERS:

Once your report has opened, you will then need to select the parameters.

**NOTE:** The FAMIS Discoverer is used by each campus within the NDSU system. You will need to use the little flash light to get to the business unit for UND and we are at the very end.

- Select the export date or dates you wish to run. (Double click your mouse and the date will move over)
- Once you have selected your date, hit apply and it will take you back to the parameter screen.
- Select or enter your department number and hit the go button.

Depending on the number of transactions, this may take a little bit to open. Please be patient!
USING THE SEARCH TOOL:

Instead of going to all of UND processing dates, you can enter in one date or a range of dates that you might want. If you are looking for all of 2009 charges, enter the %UND%-09%, (no spaces) and all the dates for 2009 will come up.

Here is what the executed report looks like.
You can view this report one of two ways. This is the printable page.

**Printable Page:**
Printable page allows you to review the report on your monitor. To use this view, click on the “Printable Page” button at the top left hand side of the page. Click on Printable PDF on the right. Click to view or save link. Print if you want.
Export:
Click the export button on the left.

Select Export file format (usually MicroSoft Excel Workbook)

Click Open

It will bring you to a screen with Click to View or Save – you will need to right click on this and “Open Link in New Window”.

Once you are in Excel, Select Options (Security Warning Macros Have Been Disabled) - and you want to “Enable this Content”.

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(May 8, 2009)
HELPFUL TIPS

You may need to do some set-ups with your browser to print these reports.

Here are a few tips:

Be sure your browser is set up to print background colors and images. For example, to do this in Internet Explorer:

1. Tools/Internet Options/Advanced.
   a. Check box for printing background colors and images.

If you have more than one building to keep track of, after your report has come up, go to where it says Table, click onto layout: Select MORE and the following page will come.
Select Bldg and Description with the little up arrow and hit apply. The following will come up. If you hit the down arrow by the building name, more building will come up and you can select a different building.

When you are done using Discoverer, please use the exit button by the Preference in the right hand corner, then use the large red X or go file in the left hand corner and then close.

To find the dates as to when the charges have been exported to Peoplesoft

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• Log on to the Facilities website: http://www.und.nodak.edu/dept/facilities
• On the left hand side, select Facilities Job Billing
• Select Facilities Charges Reference Numbers. Make sure use the export parameter date (UND01 21-JUL-08) and not the People-Soft date (FACJUL08A).

If you have any questions regarding the retrieval of your reports, please contact:

Karen Myerchin    777-2597 or Laura Thoreson    777-3006