Gaining Access to

IDEAS

Information for Decision Enabling and Analysis System

Training Manual
Advanced Search Viewer Tutorial
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The purpose of the ‘Information for Decision Enabling and Analysis System’ is to provide West Virginia University’s key policy makers with the capacity to make fact-based, strategic decisions.

The system has been designed, developed and supported by the Information Systems Database Administration and Administrative Systems Development units of the West Virginia University Office of Information Technology.

As the functional sponsor of the system, the Division of Planning champions the system's continued expansion and deployment to the University community.
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1. Stop Light Page
Type http://ideas.wvu.edu in address bar of your web browser. You will see this page. If light is green, IDEAS is available.

If you do not have a WVU Central ID, click on Acquire your Login ID and follow the instructions.
If you do have a WVU Central ID, click on WVU Community Enter Here.
2. Log in
The next screen requests your Central ID username and password. This is the same ID and password used for access to ENOD (Electronic Notification Of Deposit website).
3. Select Advanced Search Viewer
From the right column menu, click on **IDEAS Report Viewer** to view list of queries.
4a. Create Connection
Clicking on **IDEAS Report Viewer** will bring you to this window. If you are logging in for the first time you will not see the connection to the IDEAS data warehouse. You need to create this connection by clicking on the **Create Connection** button on the right.
4b. Set Password
Clicking on Create Connection will bring you to this window. For the field labeled Name, put the word IDEAS. Enter your username (first initial and last name) and password in their respective fields. Enter the database you want to connect to. The name of the IDEAS database is IDEAPROD. After filling in these boxes, click Apply to create the connection.
4c. Select Connection
You should now see a link to the connection entitled IDEAS. Click on this link to access the Advance Search Viewer feature.
4d. Connect to Discoverer
Enter your password and click on the Go button.
5a. Preparation: Set Preferences

The first time you log into Discoverer, you will need to change some preferences. These limit how much data is retrieved and how you display it. To change your Preferences, click on the Preferences link in the upper right hand corner of your screen.
5b. Preparation: Set preferences, Cont’d.
You can change the Discoverer Viewer Settings in the Preferences screen. You can change them to the values listed below. Be sure that the Limit retrieved query data to box is unchecked. Click Apply when you are finished.
6. Select Report

The Go button from step 4d will bring you to this screen, where you will see a list of reports. Some of the reports may be ones that you created. You will also see reports belonging to other users who have granted you access. There will be a blue arrow next to the report. Click on the arrow to expand the worksheets underneath the report.
6. Select Report
Worksheets function similarly to worksheets in MS Excel. They are essentially independent reports that relate to each other in some way. Click on the worksheet name underneath the report in order to run it.
6b. Parameters

For some reports, it is necessary to enter parameters. Parameters are a way to limit the data the report retrieves to more specific values. Frequently parameters will limit the data by College, Major, Subject or specific time period (file name). You can either type in the parameter you wish to see or you can click on the blue flashlight next to the parameter to see a list of values. After you have chosen your parameters, press Go.
6c. Parameters (cont’d)

After you have clicked on the flashlight, you will see a list of parameters from which you are able to select. By highlighting the parameter you wish and pressing the **move** (circled in red) or **remove** (circled in green) buttons, you can adjust the parameters to what you wish. If the list from which you can select is particularly long, you can search for the parameter you want by using the **Search for** box and entering a portion of what you are looking for. ‘bio’ would return biology, biometrics, microbiology, etc. Press **select** after you have chosen your parameters.
7. Query Progress
As Discoverer runs the query, you will see the following page indicating progress.
8. View Report
The results of the query will be displayed within the same window, after the query progress is completed. A sample report is shown here. See the next page for descriptions of items labeled A to G.
9. Report Options

A. To view a different worksheet, select the link from the **Worksheets** list. Discoverer will then run that report and display the results in the same window.

B. There will usually be a list of drop downs above the data in the report. Drop downs are used similarly to parameters. They limit the amount of data that the report returns. In the above example, we could drop down the box labeled “Major Desc” and see how majors other than Pre-Psychology did in Biology Classes.

C. At the top of most reports will be a title. The title often gives an explanation of what data the report contains and how to use the drop downs or parameters.

D. Click the **Export** link to export a query to your harddrive as an Excel or Text file. More details about this feature are given in Section 10 of this tutorial.

E. If you wish to run the report again for different parameters, simply change the parameters here as you did in Step 6 and hit **Go**.

F. This is the actual data contained within the report. It can be manipulated by exporting it to Excel or using the Parameters and Drop Downs windows as explained above.

G. If you wish to run a different report, you can click on the **Workbooks** link that is at the top of every page.
H. When you are done with your report, click the Exit link to end your session.
11. Exporting Reports

You may export your report to various formats. Select the desired format (usually you will pick Microsoft Excel Workbook (*.xls) ) from the drop-down list box, and click Export.
11. Export, continued
After a few moments you will be told that your export is ready. Click on the button labeled to see your report. Press the link labeled Return to worksheet to get back to your report.
14. Changing Your Password
It is a wise idea to change your password after your first login. To do so return to the ‘Connect to Discoverer Viewer’ Page in step 4a. Once there, click on the pencil icon labeled ‘Update’ next to your IDEAS connection.
14a. Changing Your Password (cont’d)
Under the Subheading Database Account Details, click on the button labeled Change Password
14b. Changing Your Password (cont’d)
Enter your old password and your new password in the correspondingly labeled fields and click the **Apply** button.
14c. Changing Your Password (cont’d)
You will be returned to the Update screen. Once here, enter your new password in the field labeled **password** under the subheading **Database Account Details** and click **Continue**. Congratulations, your new password has been saved and you will be returned to the Connections screen.
Questions?
For assistance or to request custom reports, please contact planning@mail.wvu.edu