BrioQuery Explorer:
Transitioning from 5.x to 6.x

Customer Staff Development Services

Broward County Public Schools

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Unit 1: What's New in Brio Explorer 6.2

Brio Explorer version 6.2 adds a series of new features and capabilities to the product suite. In this release there are a number of critical and high-value additions across the product line.

This document gives you an overview of the new features found in 6.2. Enjoy this new version; we are confident that it will help you make better-informed business decisions to increase productivity, efficiency, and revenue within your organization.

General

JavaScript Code
The Brio Macro language used to customize Brio queries previous to this version is gone. Brio now uses JavaScript to code queries. It is also possible to password protect JavaScript code in Brio Explorer documents. This means that any macros you created in previous versions must be rewritten in JavaScript.

Currently it is possible in each of the client tools (Designer, Explorer, Navigator) to access the object model and modify or delete JavaScript code. This new feature prevents unauthorized users from accessing the scripting environment by requiring a proper password. The menu choice to set the password is found under the File/Save Options menu.

Saving Computed Columns as a Snapshot
To speed the loading of documents in certain instances, it is now possible to save the values of computed columns within a document. For very large documents that contain many computed columns it would normally require the entire set of computed columns to be recalculated on opening, which can be time consuming for large documents.

To prevent this, users can save the computed columns values with the document in the same way that they currently save results sets of queries. When using this feature, computed columns will be refreshed whenever the query is reprocessed.

Saving computed columns as a snapshot applies to individual Results and Table sections, with the feature added as part of the Save Query Results with Document choice under the File/Save Options menu.

Multiple Queries
It is now possible to run multiple queries within the same document. You may run one query, run another query, and then link the results.   You may also use the results from one query to limit a second query.

Unit 2: BrioQuery Basics(A Review)

The Repository

By using BrioQuery you will have access to the vast information available in the Data Warehouse. In addition to the data within the warehouse, you will have access to the Query Repository. Here you will find custom designed Queries, many with reports, which have been developed for the most requested topics.

The Repository is actually located within the database. Most of the time you will use the Repository to access standard queries and standard queries with reports. It is from these queries that you will be able to obtain the current data (results) that you need. You will also be able to view that data in pre-determined reports or design your own.

The Query: What is Involved in Creating It

A query is set of database instructions that are required to retrieve data. When you retrieve data, you are essentially "reading" what is stored in a database. Data warehouses are built specifically to make this reading process faster and easier.

When a Query is created, the database is directed to return an answer set to a specific question. Each row returned in the results set is an answer to the question. There may be a few rows returned or many, depending on the question.

Elements of a Query in BrioQuery

Request Line Items and Limits

The query consists of the *column names* that we wish to retrieve data from, as well as specific *limits* on the data that we predefine before the query is processed. Limits are absolutely necessary in order for the query to return a specific answer set and run quickly.

When you select a Standard Query from the Repository, the Request Line items will be pre-determined. You will, however, be asked to set limits on certain items.

Aggregate Values

If the data is to be summarized into groups when it is returned, the query will need to be "*aggregated*". There is a choice in BrioQuery - one can return a very low level of detail or a highly summarized results set. Standard Queries in the Repository will have any aggregating of values already completed for you.

Sorting

To help understand the results set returned from a query, you may choose to predefine how you would like the data to be *sorted*. Most databases can quickly sort the data

before it is returned to you. You can also sort the data locally after the results set is returned, if you would rather look at your data from a different perspective.

About BrioQuery Documents

With BrioQuery, you work in document files that consolidate the different specifications for querying, analyzing, and presenting data stored on the database server.

Each BrioQuery document can include:

- A **Data Model** which graphically represents the database
- A **Query**, which retrieves a subset of data from the database
- A **Results set,** which is displayed in a spreadsheet-style format
- **Detail reports** which present customized views of your data
- **Table Reports,** which are reports, displayed in a tabular-style
- Multidimensional **Pivot reports** that permit drill-down analysis of data results
- **Charts** that graphically display your query results and allow different angles of vision on the data

Unit 3: Navigating The Interface

Launching the Application

Upon opening BrioQuery Explorer, a new Welcome to BrioQuery dialog box appears. In this dialog box, you will choose whether to create a new document or open an existing document, and the oce that you use.

To get started:

1. Double-Click on the **BrioQuery Explorer 6.x** icon on your desktop.
   (In **Windows** – you may also go to the **Start** menu, point to **Programs** and **BrioQuery Explorer 6.x**, and then click **BrioQuery Explorer 6.x.)**

2. The application opens and the Welcome to BrioQuery dialog box appears.

> **NOTE** The illustration lists examples of files under "Recent Database Connection Files" and "Recent Documents". *Keep in mind that this dialog box does not list any files or db connections upon opening the application for the first time.*
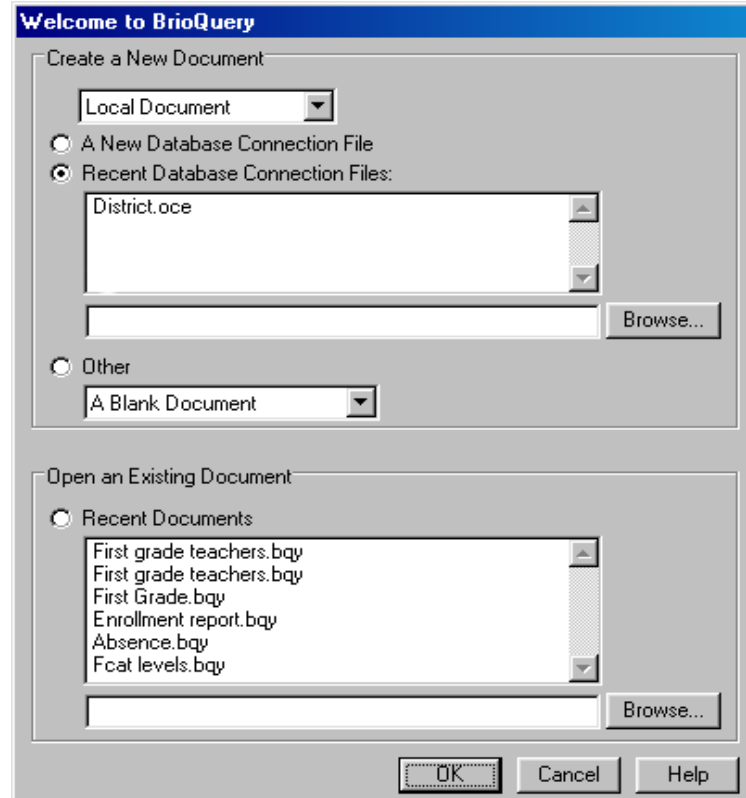
3. In the Welcome to BrioQuery dialog box, select an option, and then click the **OK** button. The following options are available:

- **Create a New Document**
    - *Local Document* – document resides locally on client's computer
        - Connect an empty BrioQuery document to a data source using an existing connection file.
        - Connect an empty BrioQuery document to a data source by creating a new connection file.
    - *Repository Document* – document exists in the DWH Repository
        - Connect to a Repository using an existing connection file and download a BrioQuery document.
        - Create a new connection file to connect to a Repository and download a Repository document.

    - *Other* – create a document without a database connection
        - Import the contents of a local file into a Table section. File formats include tab delimited {*.txt}, comma delimited {*.csv} and Excel {*.xls}.
        - Open a blank BrioQuery document, not connected to a data source, containing an EIS Section.

- **Open an Existing Document**
    - Select a BrioQuery document from the Recent Documents list or click the **Browse** button to navigate to a document.

3. If prompted, enter a **username** and **password** to connect to a data source.

Note: Brio Client Interface

The Brio client interface is a tri-pane window that provides all components necessary for performing database operations. It includes the Section title, the Section pane, the Content pane, the Catalog pane and the Request, Limit and Sort lines.
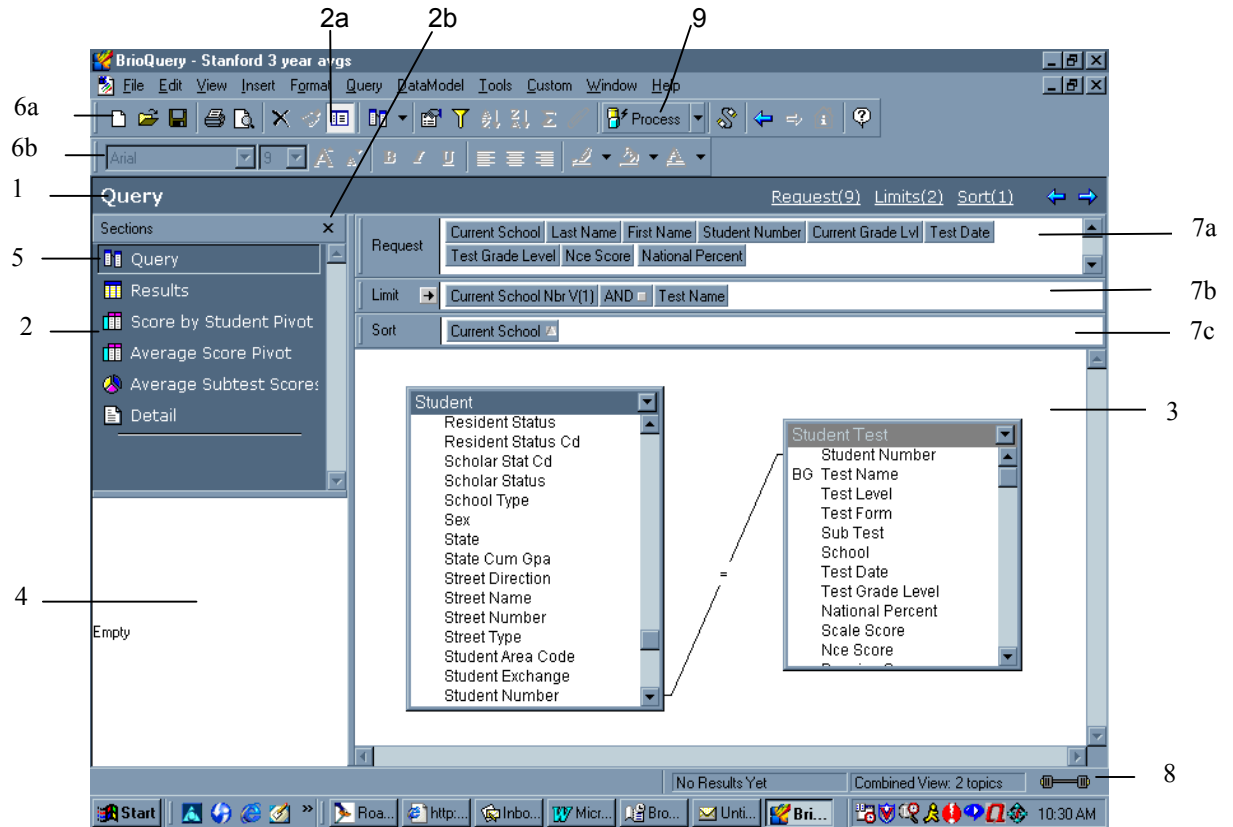
Dragging a docking bar to a new location can undock interface components, such as toolbars, lines, and Outliners.

Docking ——— Limit
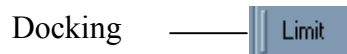
Once a component is undocked, it can be resized. To re-dock, double-click the top of the component.

NOTE	The Catalog Pane displays a list of tables in the database.

Below is an illustration of the interface.

(1) *Section Title Bar*
The Section Title bar, which is shown above the Request line, displays the section you are currently working in.

To hide or close the Section Title:

- On the **View** menu, click **Section Title Bar.**

(2) *Section Pane*
The Section pane, in the upper left area of the windows, lists all the sections that are available in a document.

To reopen the Section pane:

(2a) Click the **Section/Catalog** icon on the Standard toolbar or on the **View** menu, click **Section /Catalog**.

To hide or close the Section pane:

(2b) Click the **X** icon to the right of the "Section" heading.

(3) *Content Pane*
The Content pane (lower right area of the window), provides a view of the section you are using (ie. the Data Model, Results or Chart).

(4) ***Catalog Pane***
The Catalog pane, in the lower left area of the window, displays tables, items, reports, and/or reporting tools. The Catalog appears in a directory tree format.

To navigate through the directory tree:
- Click the + and - signs next to the Table Catalog. Click the + sign to expand the directory tree, and click the - sign to collapse the directory tree.

(5) ***Document Sections***
Documents can consist of the following sections:
- **Query** -- Database tables are listed in the Catalog pane and data models are displayed in the content area. The Request line, Sort line and Limit lines are used to create queries.
- **OLAP Query** – This is NOT available on our system.
- **Result** -- Rows of data returned from a query are stored in a table format. Data can be sorted, limited, computed, and formatted.
- **Table** -- New tables can be created based on the rows of data stored in the Results section.
- **Pivot** -- A cross-tab report style section where data can be analyzed.
- **Chart** -- Bar, line, pie, area, and ribbon charts can be created.
- **Report** -- Free-form structured reporting where multiple result sets can be displayed in one report.
- **EIS** -- An Executive Information System that has a streamlined, push-button approach to querying a database. Graphics can be imported, buttons added, and hotspots scripted to create a customized console, which retrieves data and runs reports with a mouse click. This section requires a knowledge of JavaScript programming.

To navigate to a section:
- Click the section name in the Section pane of the application. If the Section pane is not displayed, on the **View** menu, click **Section Catalog**.

To insert a new section:
- On the **Insert** menu**,** click the section type you want to insert.

(6) Toolbars
Three toolbars provide quick access to frequently used features. The toolbar configuration is saved when you exit the application, and displays the same toolbars when the application is restarted.

To toggle a toolbar:
- On the **View** menu**,** point to **Toolbars,** and then click the (toolbar name).

(6a)   Standard Toolbar
The Standard toolbar contains commands applicable in all sections.

Buttons include: New Document, Open Brio Enterprise Document, Save Brio Enterprise Document, Print, Print Preview, Remove, Format Painter, Show Section/Catalog, Insert New Section, Properties, Limit, Sort Ascending, Sort Descending, Apply Sum, Group Labels, Process, Connection Manager, Back, Forward, EIS Home, Help.

(6b)   Formatting Toolbar
The Format toolbar provides text format, styling and edit commands and can be used to rename items.

Buttons include: Font Name, Font Size, Bigger Font, Smaller Font, Bold, Italics, Underline, Left Justify, Center, Right Justify, Line Color, Fill Color, Text Color.

(6c)   Section Toolbars
Specific Section toolbars are available in the Chart, Report, and EIS sections.

Chart Section: buttons include Chart Type, Set Legend On, and Zoom.

Report Section: buttons include Alignment, Make Same Size, Layer, Set Spring, and Zoom.

EIS Section: buttons include Design/Run, Alignment, Make Same Size, and Layer.

(7)   Command Lines
The Request, Sort and Limit lines are drag-and-drop command lines that offer a visual way to complete some of the most important operations in the query and reporting process. If you hide command lines, the conditions are maintained until the command lines are displayed again and changes are made.

To toggle the command lines:

> On the Section Title bar, click (command option).

> ***(7a)*** *Request Line*
> The Request line appears in the Query section and references the items in the query. Items are added to the query by dragging them from a data model to the Request line. The Request line is expandable and can wrap text to display multiple rows of request columns.

> ***(7b)*** *Limit Line*
> The Limit line tracks limit constraints placed on a query. A limit can be applied to an item by dragging an item from the data model in the content area to the Limit line. A Limit line is also available in the Results and Table Sections for the purposes of filtering data locally.

> ***(7c)*** *Sort Line*
> The Sort line tracks sort conditions applied to the data set, and allows you to specify compound and nested sorts. Apply a sort to an item by dragging a Request item to the Sort line.

(8) *Status Bar*

The Status Bar is located below the content area and displays live information about data retrieval and the connection status.

> *To toggle the Status Bar:*
> - On the **View** menu, click **Status Bar.**

(9) *Process*

BrioQuery Explorer 6.2 allows <u>multiple queries</u> in a document. There are three processing options:

- **Process Current –** processes the query that is currently active.
- **Process All –** processes every query in the document.
- **Process Custom –** opens a Process Custom dialog box and enables the user to choose specific queries to process**.**

Results from one query may be used as input to another query within the same document.

Outliners

Outliners are drag-and-drop templates used in the Table, Pivot, Chart, and Report sections. Each Outliner panel corresponds to a specific layout element of the report. To create reports, drag items from the Catalog into an Outliner panel. Data appears simultaneously in the content area with the appropriate formatting. Also use the Outliner to manage a report. The Outliner lets you add, move, reorder and remove items quickly and easily.

To toggle Outliners:
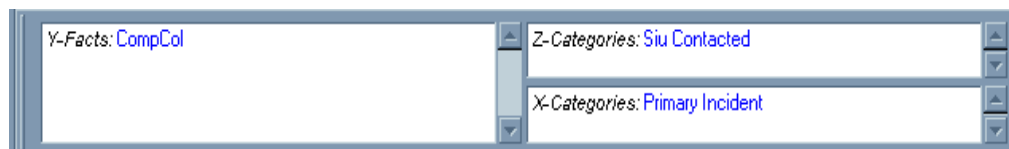
Click <u>Outliner</u> on the Section Title bar.

Table Outliner

School Year , Occur School , Event Place , Involve Type

Pivot Outliner

Side Labels: Primary Incident	Top Labels: Involve Type
	Facts: CompCol

Chart Outliner

Y-Facts: CompCol	Z-Categories: Siu Contacted
	X-Categories: Primary Incident

Report Outliner

Report Group1(Results): School Year	Table Dimensions: Involve Type
Report Group2(Results): Occur School	
Report Group3: *Drag columns here to create a cate*	Table Facts: CompCol
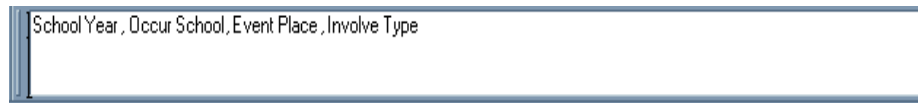
Selection Techniques

Brio clients follow standard mouse procedure for selecting items in a series.

To select a contiguous range of items:
1. Click the first item in the range.
2. Hold the [shift] key and click the last item in the range. The entire range of items is selected.

NOTE You cannot make contiguous item selections in the Chart section. You have to select each chart object as discontiguous items.

To select discontiguous items:
1. Ctrl-Click each item (Windows), or Command-Click each item (Macintosh).

Special Selections

In several cases, use the modifier key to select or complete a mouse operation (for example, when selecting an individual row in Pivot reports). The modifier key combination depends on your operating system platform:
- Windows: Alt-Click
- Macintosh: Option-Click

Menus, Speed Menus, and Keyboard Commands

Speed menus are convenient for issuing commands "on the fly". In addition, users can also use standard menu bar commands to perform *a* variety of tasks.

To use a speed menu:
1. Right-Click(Windows) or Ctrl-Click(Mac).
2. Choose the desired command from the speed menu, or submenu.

Keyboard Commands

Keyboard commands are used in the following ways:

1. Press a modifier key to make a special selection.
2. Press the **Delete** key to remove items from the display.
3. Scroll up and down in Results and report sections using the **Page Up** and **Page Down** keys (or the scrollbars and mouse).

Online Help

Brio Enterprise Online Help is an online guide to working with the Brio suite of products. The default Online Help window pops up in the upper-right corner of the screen. A vertical scrollbar is available on the window if all the text cannot be displayed in the default open window.

To access Online Help:

- On the Windows **Help** menu, click **Help.**
- On the Macintosh Apple menu, click **Help.**

1. Log off Brio. (Choose File/Quit from the Menu Bar)
2. Launch the BrioQuery Application and open the Repository Catalog.

Answer the Below Question:

How do you determine that you have successfully logged onto Brio?

_____

_____

Unit 4: Working with the Repository Catalog

## Retrieving Repository Documents

To retrieve a Repository document, a user first needs to connect to the database where the Repository resides. To connect to a Repository, a user requires a database *connection file.* Connection files have an *.oce (Open Catalog Extension) file extension. A connection file contains all of the software and network specifications needed to connect to the database. These files are created by ETS and available as part of these installation of BrioQuery. For more information, refer to the instructions found at the Data Warehouse web site.

To download a Repository document:

1. Open BrioQuery.
2. Configure the Welcome to BrioQuery dialog box, and then click the **OK** button.
   - Select **Repository Document** from the first pull-down menu.
   - Click the **Browse** button to search for a connection file to the database that contains the Repository, and then double-click the connection file. By default, connection files are stored in a folder called "Open Catalog Extensions".
3. Log on to the database by entering in a Host User and Host Password. Click the OK button to continue.
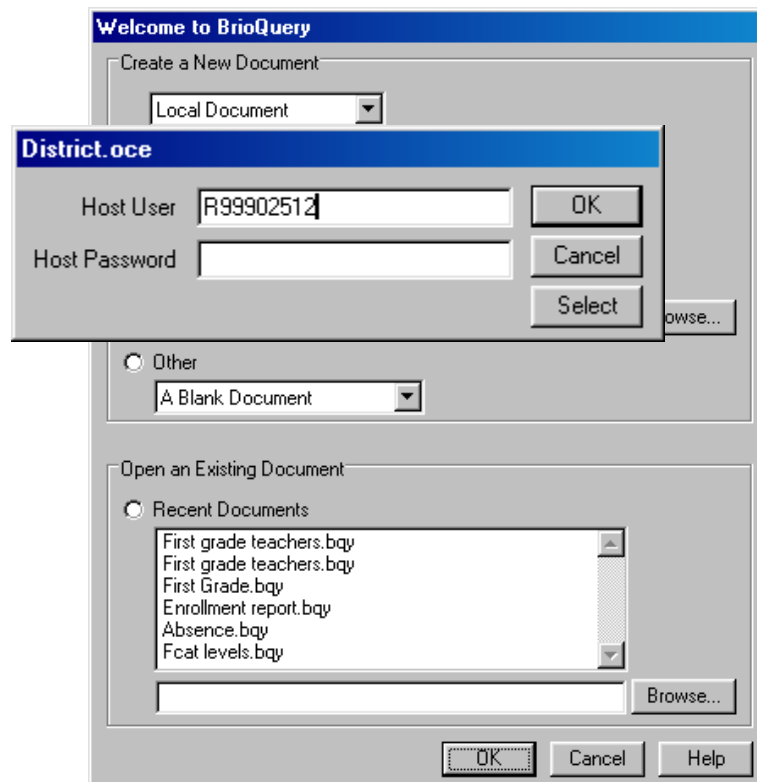
4. Browse the folders in the tree control, select a Standard Query with Reports document, and then click the Open button. The document is then loaded locally to your computer.
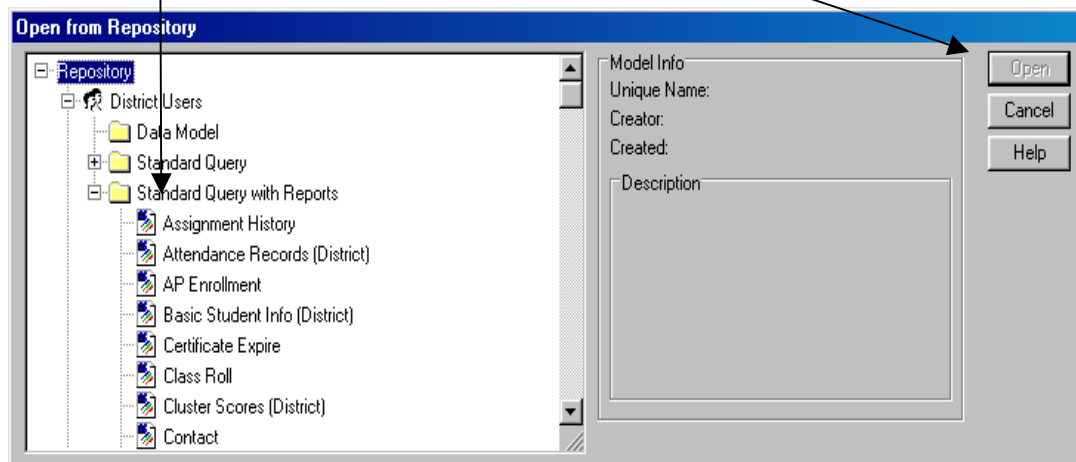
You may also open a Repository document by click on

Processing Queries

Process queries to do the following:

- Update the data in the reports
- Populate the Results sections with data
- Enter different limit constraints on the queries (see Variable Limits)

Repository queries either process automatically (if Auto-Processing has been set up) or need to manually be processed by the user. Repository reports initially display data from the last time they were processed and resaved to the Repository. Also, the Results sections in the document will not contain any data and the queries are not connected to any data source.

Since multiple queries can exist in a Brio 6.x document, there are three processing options on the Standard toolbar:

- **Process Current –** processes the query that is currently active.
- **Process All –** processes every query in the document.
- **Process Custom –** opens a Process Custom dialog box and enables the user to choose specific queries to process**.**

NOTE	In order to process a query, a database connection is needed.

To process a query (or queries):

1. Click the **Process** button (or select a processing option) on the Standard toolbar.
   - If Process Custom is selected a Process Custom dialog box appears.

Click the check boxes beside particular queries, and then click the **OK** button.

2. In each connection dialog box, enter a **Host User** (that is, a database user name) and **Host Password,** and then click the **OK** button.
- During retrieval, the Status bar displays a dynamic row count indicating the rate and progress of database processing and network transfer.

To cancel a processing query:

- Windows: Simultaneously press and <u>hold</u> the [Alt] and [End] keys on the keyboard until the query is canceled.
- Macintosh: Press and hold the [Apple/Command] and [.].

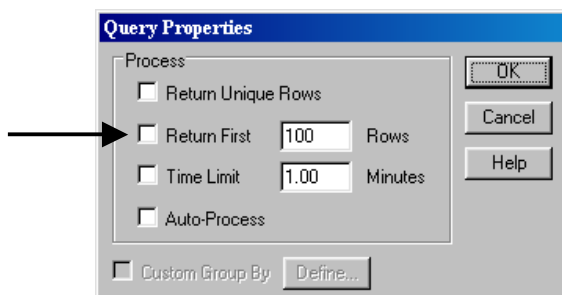|	
NOTE	Do NOT cancel processing by using a FORCE QUIT in MAC or END TASK in Windows unless absolutely necessary. If you do, please notify DWHMail so that we may cancel the processing on the AS400. If the database is performing computations prior to sending the data across the network, the query can only be canceled if an asynchronous API, such as Open Client is used.

a) **Auto-Processing**
Queries can be configured to automatically process when a document is opened. This saves users the step of manually processing the queries (that is, clicking the Process button). This is referred to *as auto-processing.*   To do this click on Query → Query Options; put a check mark next to Auto-Process.

b) **Variable Limits**
Queries often contain *variable limits* that prompt users to enter or select limit values before the queries are processed on the database. Variable limits provide query flexibility. For example, a query may prompt users to select a year or particular school value. Some users may want to look at the current year and others the previous year. Variable limits have a **V** with a number in brackets next to it (ie. V(1)). To turn it off, Right-Click(Windows) or Ctrl-Click(Mac) on the limit and click *Variable Limit*. To have a variable limit come up, but not use it, click **Ignore**.

Most databases contain such large volumes of data that setting limits on queries is critical. Administrators need to set limits on their queries; however, hard-coding the limit values does not always meet the users needs. Variable limits often solve the problem since users must enter limit values in the prompts, but can enter the values they need.

Prior to processing a query a limit can be set to return a specified number of rows. To preset a specific number of rows to be returned choose: Query/Query Options from the menu bar. Click in the Return First # of rows box and specify the number of rows to be returned.

Query Properties

Process
- ☐ Return Unique Rows
- ☐ Return First `100` Rows
- ☐ Time Limit `1.00` Minutes
- ☐ Auto-Process

☐ Custom Group By   [Define...]

[OK]
[Cancel]
[Help]

Unit 5: Working in the Results Section

About the Results Section

The *Results section* acts as a place to manipulate or prepare the data for pivot, charts, tables, and free-form reports. It is also used to verify the accuracy of queries. Although a query may have accessed several different database tables, the data is consolidated into a single table in the Results section. Each requested item is arrayed in a column field, and there is a row for each database record. In order to be able to create reports, data must be available in the Results section. If you do not save the results of a query with a document, then creating reports and analyzing data is not possible.

Below is an example of a Results section:

	Course Number	School	Course Title	Subject Area
1	ACG20010	DEERFIELD BEACH ELEMENTARY	PRINC ACCT I	ELECTIVES
2	AMH2010D	DEERFIELD BEACH ELEMENTARY	HIST U.S. TO CIV WAR	ELECTIVES
3	AMH20100	DEERFIELD BEACH ELEMENTARY	AMER HIST	ELECTIVES
4	AMH2020D	DEERFIELD BEACH ELEMENTARY	HIST US-CIV WAR-PRES	ELECTIVES
5	AMH20200	DEERFIELD BEACH ELEMENTARY	HISTORY OF US	ELECTIVES
6	AMH2035D	DEERFIELD BEACH ELEMENTARY	THE U.S. 1945-PRES	ELECTIVES
7	AMH2091D	DEERFIELD BEACH ELEMENTARY	HIST AFRICAN AMER	ELECTIVES
8	AMH20910	DEERFIELD BEACH ELEMENTARY	HIST OF AFRO AMER	ELECTIVES
9	AML2012D	DEERFIELD BEACH ELEMENTARY	AM LIT COLON TO 1900	ELECTIVES
10	AML2022D	DEERFIELD BEACH ELEMENTARY	AMERICAN LITERATURE	ELECTIVES
11	AML31240	DEERFIELD BEACH ELEMENTARY	HEMINGWAY, FITZ &FLK	ELECTIVES
12	ANT19300	DEERFIELD BEACH ELEMENTARY	CONTROVERSY& CONT	ELECTIVES
13	ANT20000	DEERFIELD BEACH ELEMENTARY	INTRO ANTHO	ELECTIVES
14	ANT34100	DEERFIELD BEACH ELEMENTARY	CULTUR ANTHROPOLOGY	ELECTIVES
15	ARC13010	DEERFIELD BEACH ELEMENTARY	ARCH DESIGN I	ELECTIVES
16	ARH20000	DEERFIELD BEACH ELEMENTARY	ART APP	ELECTIVES
17	ART12010	DEERFIELD BEACH ELEMENTARY	ART 1201C	ELECTIVES
18	ART13000	DEERFIELD BEACH ELEMENTARY	ART 1300C	ELECTIVES
19	ART1600C	DEERFIELD BEACH ELEMENTARY	COMPUTER ART	ELECTIVES
20	ART2110C	DEERFIELD BEACH ELEMENTARY	CERAMICS	ELECTIVES
21	ARV09900	DEERFIELD BEACH ELEMENTARY	COMMERCIAL ART	NON CREDIT
22	AST1005D	DEERFIELD BEACH ELEMENTARY	ASTRONOMY SOLAR SYS	ELECTIVES

School Year, Course Number, School, Course Title, Subject Area, Credit Value, Fte Pgm Nbr, Nbr Of Terms, Course Seats, School Number, Subject Area Cd

Note the area at the bottom of the results. This lists all the items you have selected on the Request line of the query.

Opening and Closing Documents

Documents can be stored locally on a user's computer or on a network file server. It is a good idea to save the documents with results prior to data manipulation. (This will avoid the necessity of re-processing queries should the results section become lost).

To open a document on a file server upon opening the application:

1. Open BrioQuery Explorer.
2. Configure the Welcome to BrioQuery dialog box, and then click the OK button.
   - Select **Local Document** from the first pull-down menu. This is selected by default.
   - In the "Open an Existing Document" area, click the **Browse** button to search for a document, browse for the document, select the document through Network Neighborhood, or one of your mapped network drives, and then click the **Open** button. The document is opened.

To open a document from within the application:

   - On the **File** menu, click **Open**, browse to a directory, select a document, and then click the **Open** button.

To close a document:

   - On the **File** menu, click **Close**. If the document has not been saved, the user is prompted to save.

Saving Documents

Documents can be saved locally or on a file server for future use. Saving a document is similar to saving other application files. Content from all sections is saved. The following saving options are available:

   - **Save the document in a compressed format**. This results in smaller file sizes, which saves valuable storage space and enables the document to be quickly transmitted. The decompression of the compressed file happens automatically when the document is reopened. Brio clients can be configured to save all documents in compression file format by globally enabling the Compress All Documents Option.
   - **Save results with the document** if you wish to be able to work without being connected to the database.
   - **Password Protect a document**. Users must enter a password to open the document.
   - **Password Protect your JavaScript within a document.** Users must enter a password to look at Document Scripts and EIS Sections in Design Mode.

To save a new document:

1. On the **File** menu, click **Save As.**
2. In the Save File dialog box, select a directory, enter the name of the file, choose a file type, and then click the **Save** button.
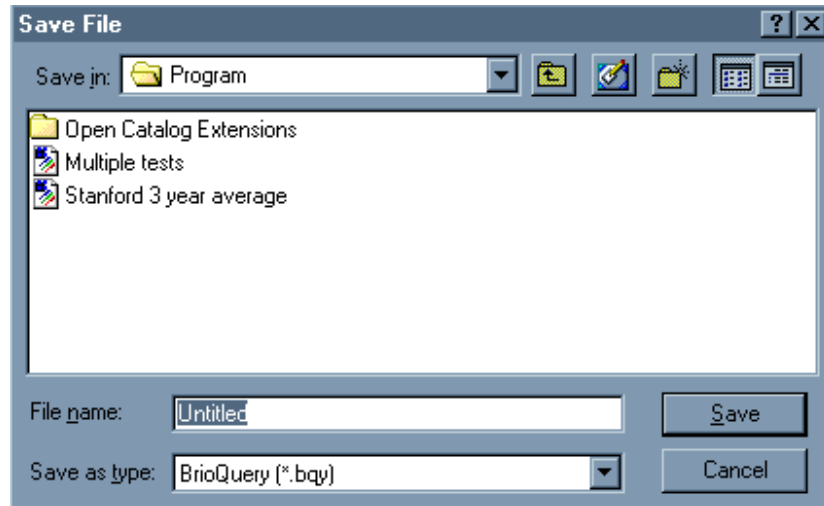
To save the document in a compressed format:
1. On the **File** menu, point to **Save Options,** and then click **Compress Document.** A check mark is displayed next to the Compress Document feature**.**

To configure all documents to save in compression file format:
1. On the Tools menu, point to **Options**, and then click **Program Options**.
2. In the **General** tab, choose **Compress all documents** and/or **Create new documents compressed**.

To save the results with a document:
1. On the File menu, point to **Save Options,** and then click **Save Query Results With Document.**
2. In the Save Results With Document dialog box, click the check boxes for the queries for which to save results, and then click the **OK** button.

To password protect a document:
1. On the File menu, point to **Save Options**, and then click **Password Protect Document.**
2. In the Password Protect Document dialog box, enter a password, and then click the **OK** button.

To password protect Document Scripts:
1. On the File menu, point to **Save Options**, and then click **Password Protect Design Mode**.
2. In the **Password Protect Design Mode** dialog box, enter a password, and then click the **OK** button.

Manipulating the Database

Pivot, chart, and table reports are based on the results set of a single query, whereas free-form reports can reflect data from several queries. Results data can be prepared by applying local limits and formatting numbers.

Local Limits

Applying limits in the Results section enables a user to "locally" filter the dataset returned from a query. These types of limits are referred to as *local limits.* Since report sections are based on Results data, local limits also filter data in the report sections. Because local limits only hide data from the display, they are a good way to filter the dataset to reflect temporary and hypothetical situations. A limit can always be suspended or deleted to return data to the display and make it available for reporting. The Status bar displays the total number of rows in the dataset, after local limits have been applied. Columns can have one limit applied only.

To apply a local limit:

1. Double-click the column you wish to limit in the Results section. A Limit dialog box appears.
2. Configure the Limit dialog box.
   - Choose a logical operator from the pull-down list.
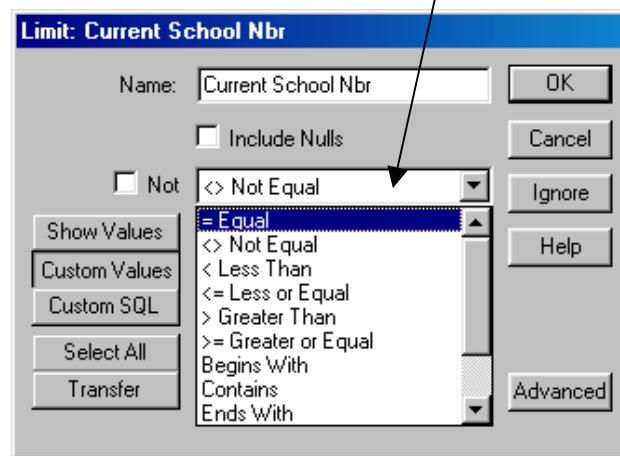
   - Create a Custom Values list by supplying a value (or values, separated by commas) in the Edit field, and clicking the green check mark button. Alternatively, click the **Show Values** button to display column values and select one or more values depending on the comparison operator. **Note**** Be careful in selecting **Show Values** as this will force Brio to read an entire table, which can be *very large* and time consuming.
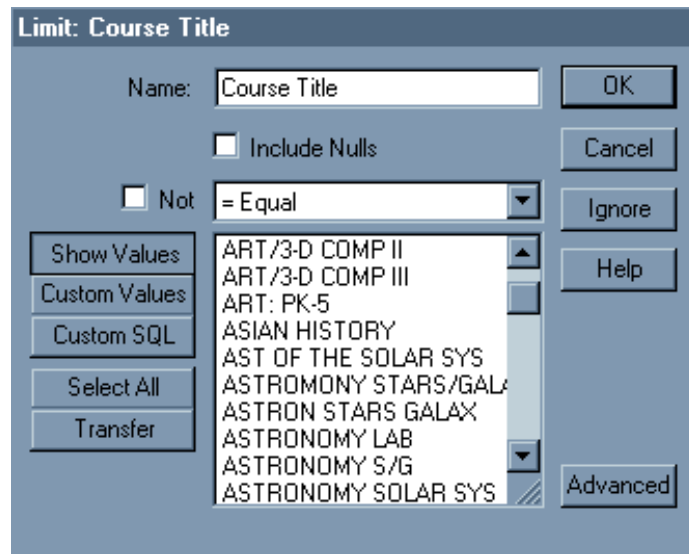
3. When the values are highlighted in the values panel, click the **OK** button. The limit is applied to the column and the column name is added to the Limit line.

To remove a limit in a results set:

- Right-Click(Windows) or Ctrl-Click(Mac) a Limit item, and then click **Remove**.

To remove all limits in a results set:

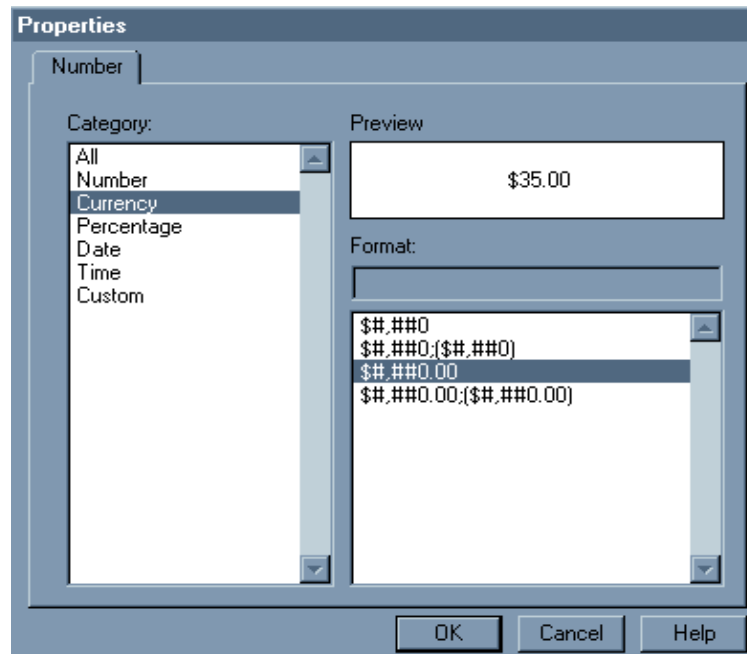- Right-Click(Windows) or Ctrl-Click(Mac) **Limit** on the Limit line, and then click **Remove**.

Formatting Numbers in Results

Format numbers once in the Results section to avoid formatting them each time they are used in a report section.

To apply a number format to a column:

1. Select a column, Right-Click(Windows) or Ctrl-Click(Mac), and then click **Number**. A Properties dialog box appears.

2. In the **Numbers** tab select a number format, and then click the **OK** button.

Properties

Number

Category:

All
Number
Currency
Percentage
Date
Time
Custom

Preview

$35.00

Format:

$#,##0
$#,##0;($#,##0)
$#,##0.00
$#,##0.00;($#,##0.00)

OK   Cancel   Help

3. You may also click on Custom to create a custom format.

1. Launch Brio.
2. Process the FCAT query from the Repository, limiting your Request to 500 rows; ignore all criteria (limits).
3. Save your query with results.
4. Sort your records in alphabetical order by grade level.
5. Create a list of students whose FCAT score is below 250.

Answer the Following Questions:

1. If you wanted to open a document you have on your computer, what would you select from the Welcome to BrioQuery dialog box?
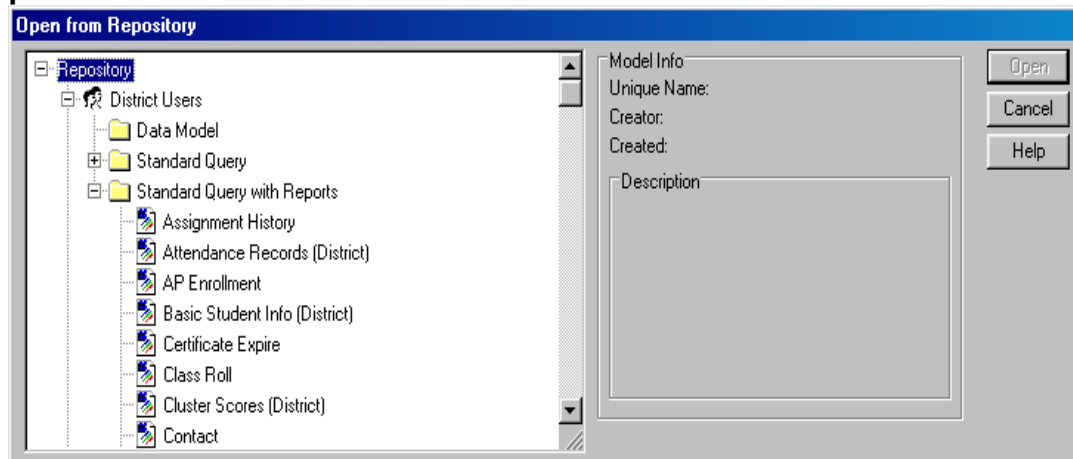
_____

_____

2. How do you view values for a field prior to choosing a limit for a field?

_____

_____

Unit 6: Running Reports

Getting Started

Your first step in using a Repository report is to get connected to the database and browse the Repository. You then select a report and load it to your computer. Next, you simply process the query and manipulate the reporting sections.

Example

The picture shows a Repository containing Standard Query with Reports documents.

Opening the Repository after Brio has been launched

To access a Standard Query or a Standard Query with Reports in the Repository, after successful sign-on:

1. Choose *File > Open from Repository.*

2. Select the appropriate connection file (e.g., Training, District).

3. Log on to the database.

4. Choose the Repository (e.g., Training) you would like to browse by clicking the database icon.

5. Select the listing for either Standard Query or Standard Query with Reports to see the listing available documents.

6. Select the report you want to use and click Open. (Mouse click once prior to choosing the "open" button to view a description of the query)

7. Click the Process button on the Standard toolbar if the query does not process automatically. Remember, you may be asked to define various limits.

8. Select the section tabs to view the reports.

Exercise

Access the report called "Demographics" in the BrioQuery Repository. Download and process it. View the reports included with the query.

1. Close all existing BrioQuery documents.

2. Access the Repository by selecting **File / Open from Repository**.

3. Select the Training connection file (OCE).

4. Log on to the database.

5. Select and expand **Standard Queries with Reports**.

6. Select **Health Conditions** and click *Load*. The BrioQuery document will be loaded to your computer. Initially you will be presented with the Query section.

7. Click the **Process** button on the Standard toolbar to refresh the report

8. Limits have been included with this standard query. In the Limit boxes: Click **Ignore** on all Limits.

   NOTE: Some queries stored in the Repository may contain variable limits. When you process a query with variable limits, you will be prompted to select or enter values into a limit dialog box. By using variable limits, documents can be easily and quickly customized to return desired results.

   ---

9. Investigate the query, results and various reports contained in the Demographics document by clicking on the buttons in the Section Pane.
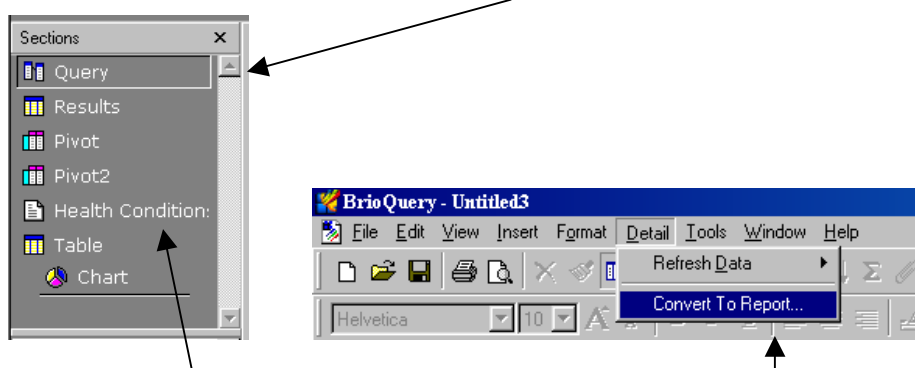
10. Click on the Health Condition Detail in the Section Pane.

11. Convert the Detail to the new Report format by clicking on Detail / Convert to Report.

Wide Reports

Previously users could create reports that were wider than the available print area for use when deploying reports for viewing rather than printing functionality. Since 6.0 the width of the available report design space was determined by the available print drivers and so was limited to the maximum printable space. In this release, a Page Size tab has been added to the Report Page Setup dialog.

Now users may select custom report size dimensions to create reports much larger than the maximum printable space. Reports created which exceed the paper size available from the print driver can still be printed, however, only the leftmost portion of the report that fits on the paper will be printed. This new feature is primarily for creating reports for onscreen viewing only.

Users who export Reports to HTML pages may want to use this setting to control the number of 'pages' that are included in each HTML file. The default behavior is to export each logical page to a single HTML file. By adjusting the height of your Page Size to say 33 inches, when exporting the report to an HTML file, it will have the equivalent of three printed pages in the single HTML file. If you wish to ensure that all the pages in your report are contained in a single HTML file, set this height value to a large number.

Modifying Existing Detail Reports

Because the Detail designer is no longer supported, existing Detail reports are opened in read-only mode. To modify the main contents of an existing Detail report, it must first be converted to the new Reporter.

Detail reports can only be converted to Reporter when the document contains Saved Results, so you may need to reprocess the query before conversion. Next, select Detail | Convert to Report from the main menu system. This will insert a new Report section into the document that contains the converted report. The original Detail report is left untouched.

Every effort has been made to make the conversion to the new Reporter as faithful to the original Detail design as possible. Some conversions may need some rework. Other reports, especially those that use computed items, multiple page header/footers, or complex formatting, may need some additional design work after conversion.

UNIT 6: SUMMARY EXERCISES

1. Select the Contact Query from the Repository Catalog.
2. Process the Query.
3. Use the following Limits when prompted:
   a. Student Number: IGNORE
   b. School Number: 0251
   c. Last Name: IGNORE
   d. First Name: IGNORE
4. Convert the Detail to a Brio 6.2x Report.

Answer the Following Questions:

1. Where is the command to convert an old style Detail to a Brio 6 Report?

_____

_____

Unit 7: Creating Tabular-Style Reports
(Something New in 6.2)

About Tabular-Style Reports
The *Table section* is used for creating tabular-style reports. The data is not summarized in the Table section, as it is in the other report sections. The data is presented at the same granularity level as in the Results section.

Table sections share the same functionality as Results sections. Pivots, Charts, and free-form reports can be created based on a table's dataset, in the same way reports are derived from a Results dataset.

The Outliner in the Table Section contains Request items that are to be included in the table report. Below is an example of a blank Table section.
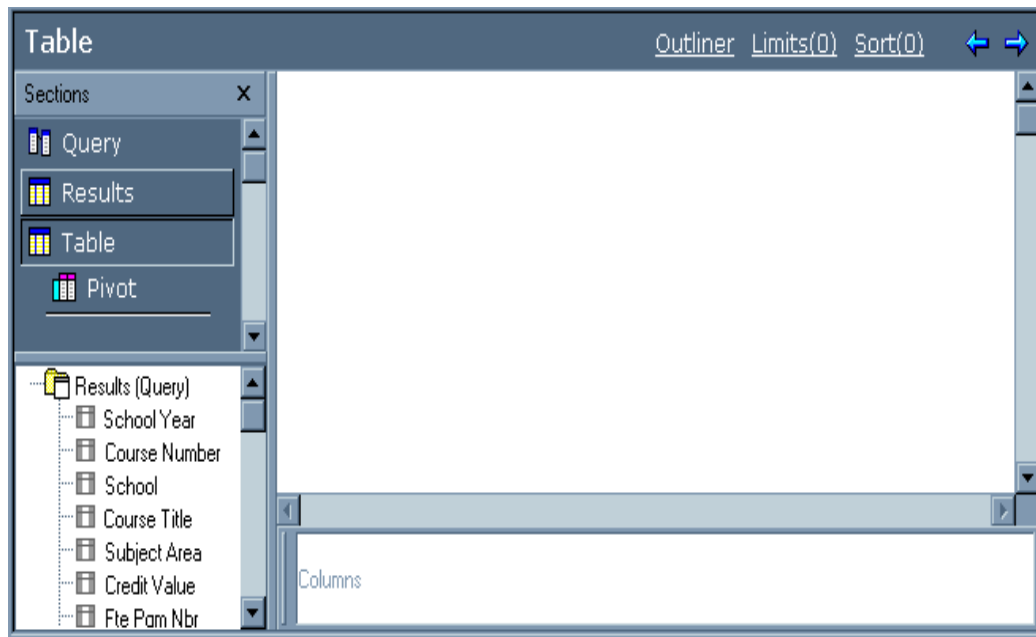
To create a table report:

1.   On the **Insert** menu, click **New Table**.
2.   Drag Request items from the Catalog into the Outliner. Click the **Outliner** button on the Section Title bar if it is not displayed below the content area. A Request item can be added only once to a table.

Removing and Hiding Columns

Columns can be removed from or hidden in a table report. If a column is not added to the Outliner or it is removed from the Outliner, then it cannot be displayed in reports or referenced in local computed columns. If a column is added to the Outliner, and then hidden, it is not displayed in the table report, but can be referenced in local computed columns and displayed in other reports.

To remove a column in a table report:

- Select a column in a table Right-Click(Windows) or Ctrl-Click(Mac), and then click **Remove Column**.

To hide a column in a table report:

- Select a column in a table, Right-Click(Windows) or Ctrl-Click(Mac), and then click **Hide Column**.

To unhide a column in a table report:

- To unhide a column, Right-Click(Windows) or Ctrl-Click(Mac) anywhere within the Contents pane and click **Unhide Column**. When the Unhide Column dialog box appears, select the column that you want to unhide and click **OK**.
- You can also select **Unhide Column** from the Table menu.

Sorting Tables

The rows in a table report can be sorted based on a single column or multiple columns. Use the Sort (Ascending or Descending) buttons on the Standard toolbar to quickly sort a column or multiple columns in the same order (ascending or descending). Use the Sort Line to view Sort items and to apply nested sorts to multiple columns using combinations of ascending and descending sort orders.

To sort a column using the Sort buttons:

- Select a column to be sorted, and then click the Sort (Ascending or Descending) button on the Standard toolbar.

To apply sort conditions using the Sort line:

1. Click <u>**Sort**</u> on the Section Title bar to display the Sort line.

2. Drag Request items from the Catalog pane to the Sort line.
   - Establish a final sort sequence by reordering Sort items. Items are sorted from left to right.
   - Double-click specific Sort items to toggle ascending and descending sort orders. Ascending is the default sort order.

- Click **Sort Now** on the Sort line to begin sorting.

| Sort Now | School Year ▲ | Course Number ▲ | School ▲ | Course Title ▲ |

	School Year	Course Number	School	Course Title
1	1997	ACG20010	DEERFIELD BEACH ELEMENTARY	PRINC ACCT I
2	1997	AMH2010D	DEERFIELD BEACH ELEMENTARY	HIST U.S. TO CIV WAR
3	1997	AMH20100	DEERFIELD BEACH ELEMENTARY	AMER HIST
4	1997	AMH2020D	DEERFIELD BEACH ELEMENTARY	HIST US-CIV WAR-PRES
5	1997	AMH20200	DEERFIELD BEACH ELEMENTARY	HISTORY OF US
6	1997	AMH2035D	DEERFIELD BEACH ELEMENTARY	THE U.S. 1945-PRES
7	1997	AMH2091D	DEERFIELD BEACH ELEMENTARY	HIST AFRICAN AMER
8	1997	AMH20910	DEERFIELD BEACH ELEMENTARY	HIST OF AFRO AMER
9	1997	AML2012D	DEERFIELD BEACH ELEMENTARY	AM LIT COLON TO 1900
10	1997	AML2022D	DEERFIELD BEACH ELEMENTARY	AMERICAN LITERATURE
11	1997	AML31240	DEERFIELD BEACH ELEMENTARY	HEMINGWAY, FITZ &FLK
12	1997	ANT19300	DEERFIELD BEACH ELEMENTARY	CONTROVERSY& CONT
13	1997	ANT20000	DEERFIELD BEACH ELEMENTARY	INTRO ANTHO
14	1997	ANT34100	DEERFIELD BEACH ELEMENTARY	CULTUR ANTHROPOLOGY
15	1997	ARC13010	DEERFIELD BEACH ELEMENTARY	ARCH DESIGN I
16	1997	ARH20000	DEERFIELD BEACH ELEMENTARY	ART APP
17	1997	ART12010	DEERFIELD BEACH ELEMENTARY	ART 1201C
18	1997	ART13000	DEERFIELD BEACH ELEMENTARY	ART 1300C

Local Limits

Set limits on columns in a table report to filter the data displayed. Table section limits are in addition to the limits set in the Results section. Keep in mind that limits applied in a Table section are also applied to other reports that stem from a Table section. Limits can be suspended or deleted to return data to the display and make it available for reporting. The Status bar displays the total number of rows in the table report, with limits applied. Only one limit per column can be applied.

To limit data in a table report:

1. Double-click a column in a table report. A Limit dialog box appears.
2. Configure the limit dialog box:
   - Choose a logical operator from the pull-down list.
   - Create a Custom Values list by supplying a value (or values, separated by commas) in the Edit field, and then clicking the green check mark button.

- Alternatively, click the Show Values button to display column values, and then select one or more values depending on the comparison operator.

3. When the values are highlighted in the values panel, click the **OK** button. The limit is applied to the column and the column name is added to the Limit line.

To remove a limit in a table report:

- Right-Click(Windows) or Ctrl-Click(Mac) a Limit item, and then click **Remove.**

To remove all limits in a table report:

- Right-Click(Windows) or Ctrl-Click(Mac) **Limit** on the Limit line, and then click **Remove**.

Grand Totals and Break Totals

Table reports can display grand totals and break totals. Multiple grand totals can be displayed at the bottom of a column, each with a different data function applied. Break totals are defined in reference to data in other columns, which define a break point for the total. Data functions for break totals can also be defined.

Break totals are generated using break columns. The break column contains the data by which to group (break) the totals. The break column usually contains text values.

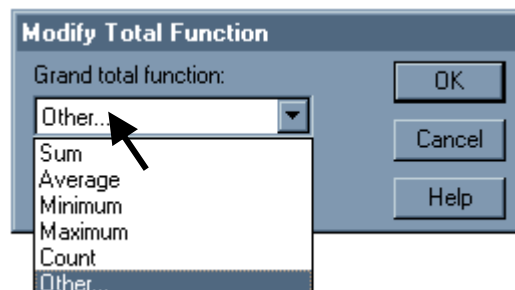### *Grand Totals*
To generate a grand total on a column:

1. Select any column in a table.
2. Right-Click(Windows) or Ctrl-Click(Mac), and then click Grand Total.
3. Configure the Insert Grand Total dialog box:
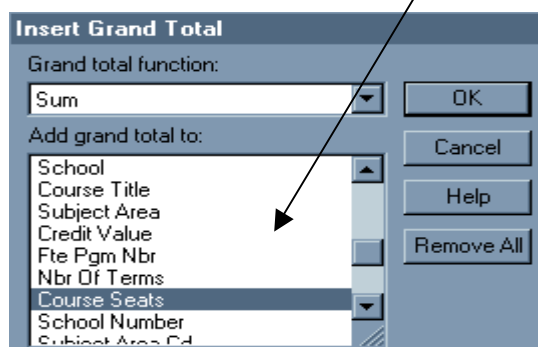
- Select a data function from the first pull-down menu.
- Select a column from the second pull-down menu.

4. Once the Insert Grand Total dialog box is configured, click the **OK** button. A total is displayed at the bottom of the selected column.

TIP To quickly create a grand total using the sum data function, select a column, and then click the Grand Total button on the Standard tool bar.

To remove a grand total in a table report:

1. Highlight a grand total row by clicking in the left margin. The grand total row is highlighted.
2. Right-Click(Windows) or Ctrl-Click(Mac) and then click **Remove Row**. The grand total is removed.

To remove all grand totals in a table report:

1. Select any column in a table report, Right-Click(Windows) or Ctrl-Click(Mac), and then click **Grand Total**.
2. In the Insert Grand Total dialog box, click the **Remove All** button, and then click the **OK** button. All grand totals are removed in the table report.

To change the data function applied to a grand total:

1. Double-click a grand total in a table report.
2. In the Modify Total Function dialog box, select a data function from the pull-down menu, and then click the **OK** button.

To create a label for the grand total row:

1. Double-click a grand total in a table report.
2. In the Modify Total Function dialog box, select **Other** from the pull-down menu.
3. In the Custom Function dialog box, enter text in double-quotes before or after the total function. Concatenate text and function with a plus sign (+).
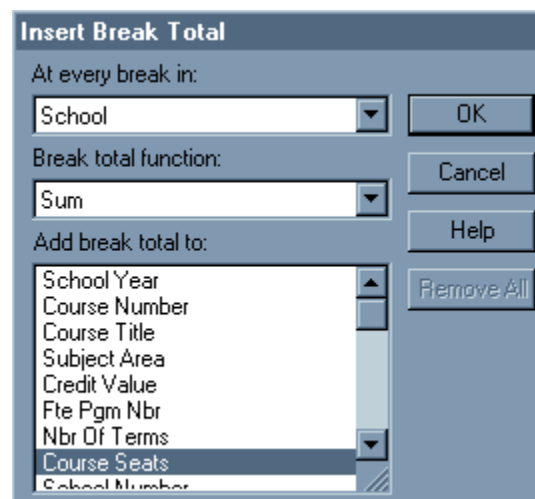
Custom Function

"Sum "+Sum(Course_Seats)

[OK] [Cancel] [Help]
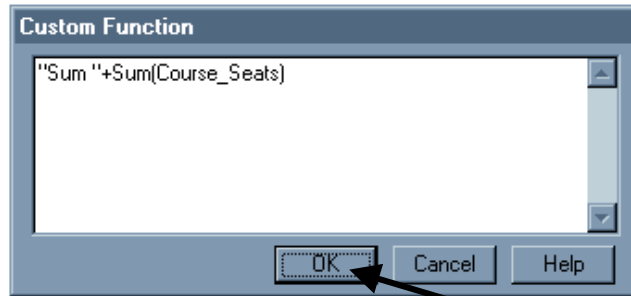
4. In the Modify Total Function dialog box, click the **OK** button to finish.

Break Totals

To calculate break totals:

1. Select any column in a table.
2. Right-Click(Windows) or Ctrl-Click(Mac), and then click **Break Total**.
3. Configure the Insert Break Total dialog box:
   - select a break column from the first pull-down menu (for example, to view totals for each School, then "School" is the break column)
   - select a data function from the second pull-down menu (for example, to *add* Course Seats values for each School, then "Sum" is the data function)
   - select a column to be used in the break total calculation (for example, to sum Course Seats values for each School, "Course Seats" is the column to which to add the break total)

Insert Break Total

At every break in:

School

Break total function:

Sum

Add break total to:

School Year
Course Number
Course Title
Subject Area
Credit Value
Fte Pgm Nbr
Nbr Of Terms
Course Seats
School Number

[OK]
[Cancel]
[Help]
[Remove All]

4. In the Insert Break Total dialog box, click the **OK** button to finish. Break totals are added to the table report.

Sort	School Year △ Course Number △ School △ Course Title △		

School	Course Title	Course Seats
SOUTH BROWARD HIGH	ALTERATIONIST	35
SOUTH BROWARD HIGH	CUS GARM MAKE 95-96	35
SOUTH BROWARD HIGH	CUS GARM MAKING/TAIL	35
SOUTH BROWARD HIGH	FASH DESIGN INDUSTRY	35
SOUTH BROWARD HIGH	FOOD MGT PROD SER	35
SOUTH BROWARD HIGH	INTERIOR DECOR FABRI	35
SOUTH BROWARD HIGH	ENVIRON SERVICES	35
SOUTH BROWARD HIGH	ENVIRON SERVICES	35
SOUTH BROWARD HIGH	FACS COOP ED OJT	35
SOUTH BROWARD HIGH	SAIL	35
SOUTH BROWARD HIGH	WORLD 20TH CENTURY	35
Total SOUTH BROWARD HIGH		**312,963**
SUNRISE MIDDLE	HOMEROOM	35
SUNRISE MIDDLE	TEAM	35
SUNRISE MIDDLE	M/J ART/ART APPREC 1	35

To remove break totals in a table report:

1. Highlight a break total row by clicking in the left margin. The break total row is highlighted.
2. Right-Click(Windows) or Ctrl-Click(Mac), and then click **Remove Row**. All related break totals are removed.

To modify a break total's function:

1. Double-click a break total in a table report.
2. In the Modify Total Function dialog box, select a data function from the pull-down menu, and then click the **OK** button.

To modify the label for a break total:

- Double-click a break total row label, enter/modify text in double quotes, and then click the **OK** button.

Modify Label

Label:

"Total " + ToChar(School)

OK

Cancel
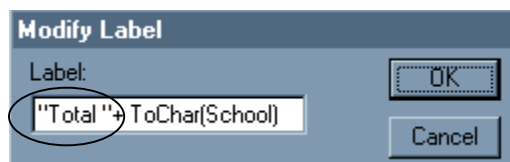
Formatting Tables

Use the techniques listed below to format table reports.

Format	Options
Resize a column	Drag a column's margin left or right to resize it manually. or Double-click a column's margin to Auto-Size. or On the **Format** menu, point to **Column**, and then click **Auto-Size Width** or **Standard Width**.
Resize a row	Select a row (by clicking in the left margin), position the cursor on a row's edge, and then drag the edge up or down to resize a row manually. or Select a row (by clicking in the left margin); on the **Format** menu, point to **Row**, and then click **Standard Height** to resize a row to a standard size. Note – Total rows need to be resized separately than regular data rows.
Font	On the **Format** menu, click **Font**. Select a Font type, Style (Regular, Bold, Italic, Bold Italic), Size, and Effect (Underline, Overline, Double Overline). Columns can have different fonts.
Numbers, Dates, and Times	On the **Format** menu, click **Number**. Select number format from the Category area (Number, Currency, Percentage, Date, Time, or Custom).
Justify data	Highlight columns, and then click a justification icon (Left, Center or Right; Top, Middle or Bottom) on the Format toolbar.
Suppress duplicate values	Select a column, Right-Click(Windows) or Ctrl-Click(Mac) and then click **Suppress Duplicates**. This feature can be applied to multiple columns.
Display row numbers	On the **Format** menu, click **Row Numbers** to toggle them on or off.
Display grid lines	On the **Format** menu, click **Grid Lines** to toggle them on or off. In the dialog box, select properties for horizontal and vertical grid lines: Default, None, or Custom (choose a Color, Width, and Style).

Format	Options
Display column titles	On the **Format** menu, click **Column Titles** to toggle them on or off.
Wrap text in a column	Select a column; then, on the **Format** menu, click **Wrap Text**.
Modify the border around a table	On the **Format** menu, click **Border and Background**. In the Border area, select properties for the border: Default (Black line), None, or Custom (choose a Color, Width, and Style).
Modify the fill of a table	On the **Format** menu, click **Border and Background**. In the Fill area, select properties for the background: Default (white), None, or Custom (choose a Color). Select an alternating color if desired.
Column text color	Select a column; then on the **Format** menu, click **Font**. Select a text color from the Font Color pull-down menu.

1. Open the Demographic query from the Repository.
2. Limit the query to the first 500 rows.
3. Sort the query (in the Table section) by school and grade level.
4. Find the number of 7th grade, Black students by school.
5. Find the number of 7th grade, Spanish-speaking students by school.
6. What is the total number of students in the Demographic query?

Answer the Following Questions:

1. How do you hide and unhide columns?

_____

_____

2. How do you access the speed menu?

_____

_____

Unit 8: Managing the BrioQuery Document

Basic Document Manipulation

Printing Reports

Users can print an active document section using the Print command.

To print a section:

1. In the Section pane, select the section to print.
2. On the **File** menu, click **Print**.
3. Configure the print dialog box, and then click the **OK** button.
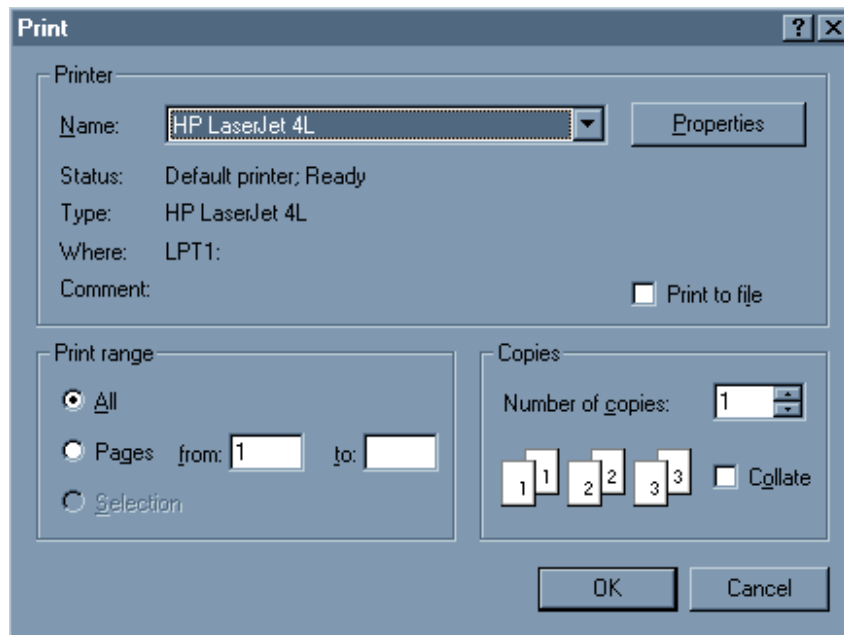
Exporting Report Sections

Report sections can be exported in common file formats such as Excel or Lotus. Sections can also be exported as HTML format, making it easy to distribute data to many corporate intranets or web sites.

To export a report as a common file format:

1. On the **File** menu, point to **Export**, and then click **Section**.
2. Configure the Export Section dialog box, and then click the Save button.
   3. Select a destination directory for the export file.
   4. Type a name for the section to be exported.
   5. Choose a file format from the Save as Type menu. The table below describes common extensions for format types.

- HTML (*.htm)
- Excel (*.xls)
- Lotus 1-2-3 WKS (*.wks)
- Tab-delimited text (*.txt)
- Comma-delimited text (*.csv)
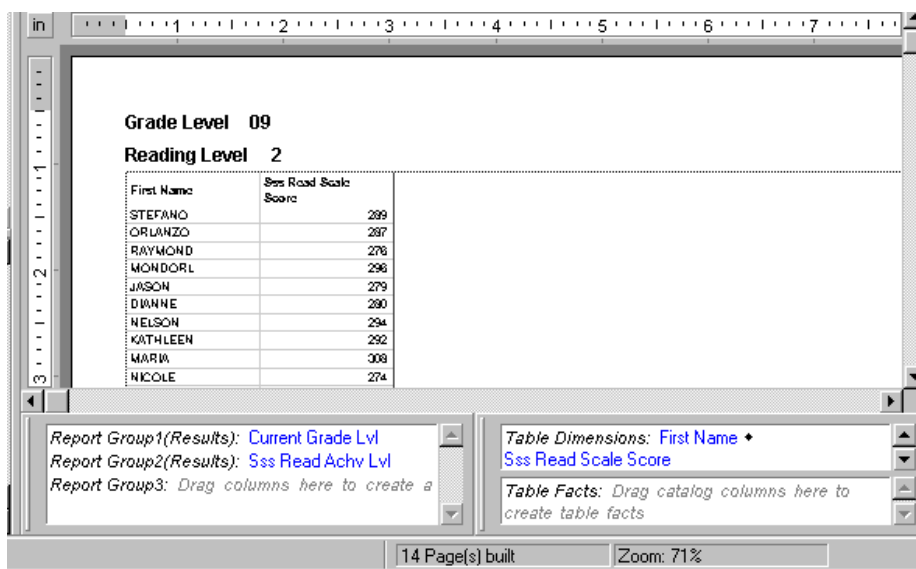
For formatting problems, tips, and suggestions, go to "Tips and Tricks" on the Data Warehouse website (http://web/dwh)

Export Reports to Excel

Selecting the Excel format will actually export a tab-delimited file. It will also assign the file an extension of .xls. All versions of Excel correctly import this file without any user intervention. This will allow a wide variety of applications to gain access to the content of reports created in Brio Explorer.

When exporting reports all header and footer information will be exported as well with as much text indentation preserved as possible. Only text elements will be exported. No graphical elements (i.e. lines, shapes, or pictures) will be exported, as these are not supported in a text file format.

For example, if you started with the following report:

When exported and opened in Excel the report output would look like this:
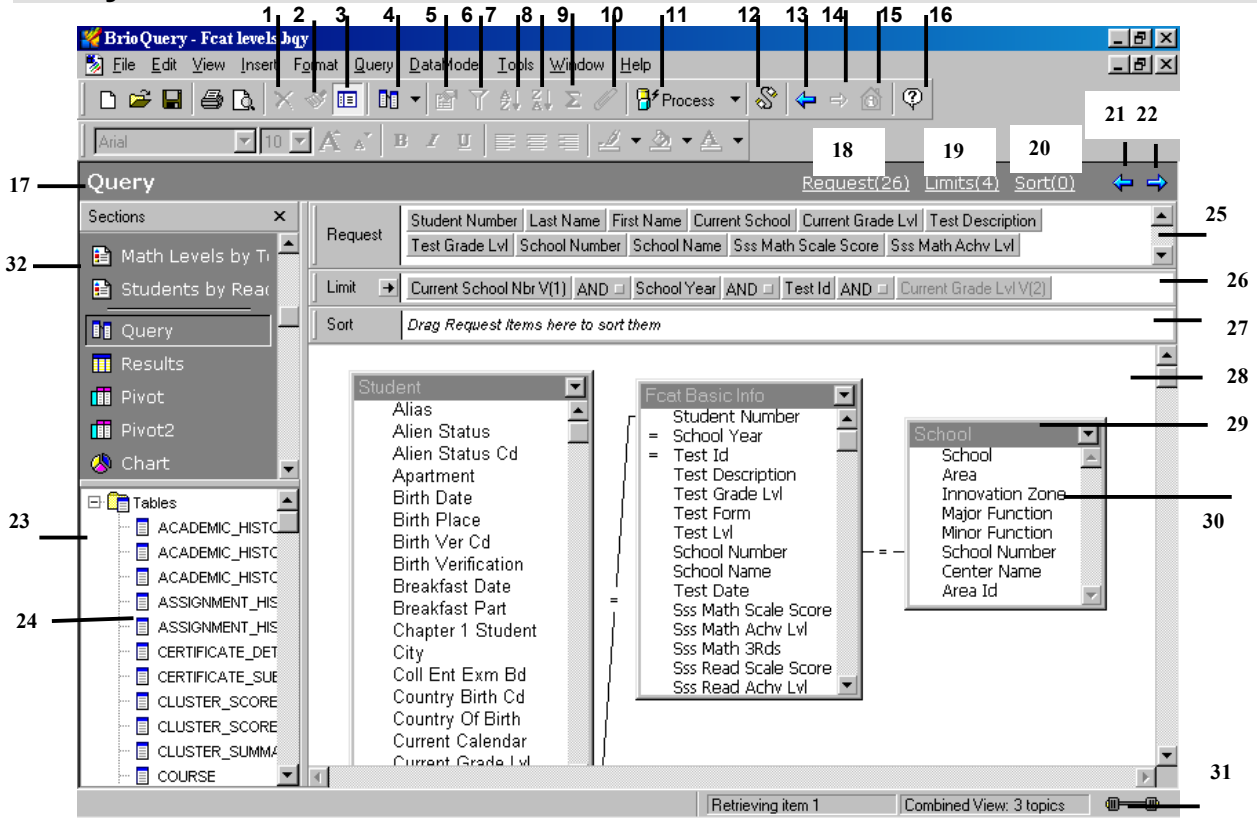
1. Use the Demographic query you currently have open.
2. Go to the Results section.
3. Export the results as an Excel document.

Answer the Following Questions:

1. What are the formats that a query can be converted to?

_____

_____

Appendix- A
Sections At A Glance

Query Section

1	Remove button	17	Section Title bar
2	Format Painter button	18	Request line button
3	Show Section / Catalog	19	Limit line button
4	Insert Section button	20	Sort button
5	Properties button	21	Back arrow
6	Limit button	22	Forward arrow
7	Sort Ascending button	23	Catalog pane
8	Sort Descending button	24	Tables
9	Grand Total	25	Request line
10	Group Items	26	Limit line
11	Process button	27	Sort line
12	Connections	28	Content pane
13	Back arrow	29	Topic
14	Forward arrow	30	Topic items
15	EIS Home button	31	Status bar
16	Help	32	Section pane

Results Section
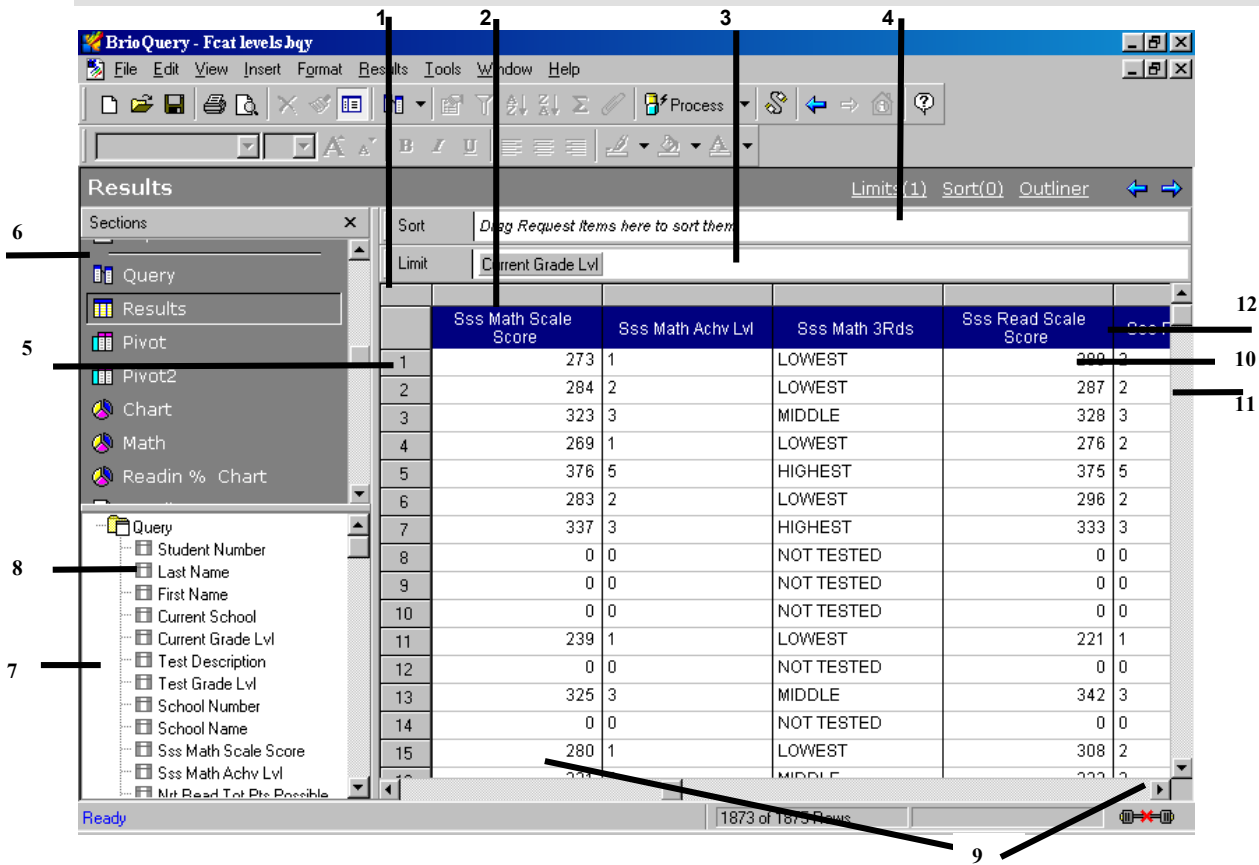
1	Select All corner
2	Column Heading
3	Limit line
4	Sort line
5	Row heading
6	Section Pane
7	Catalog pane
8	Request column
9	Request column
10	Cell
11	Row
12	Column title

Pivot Section
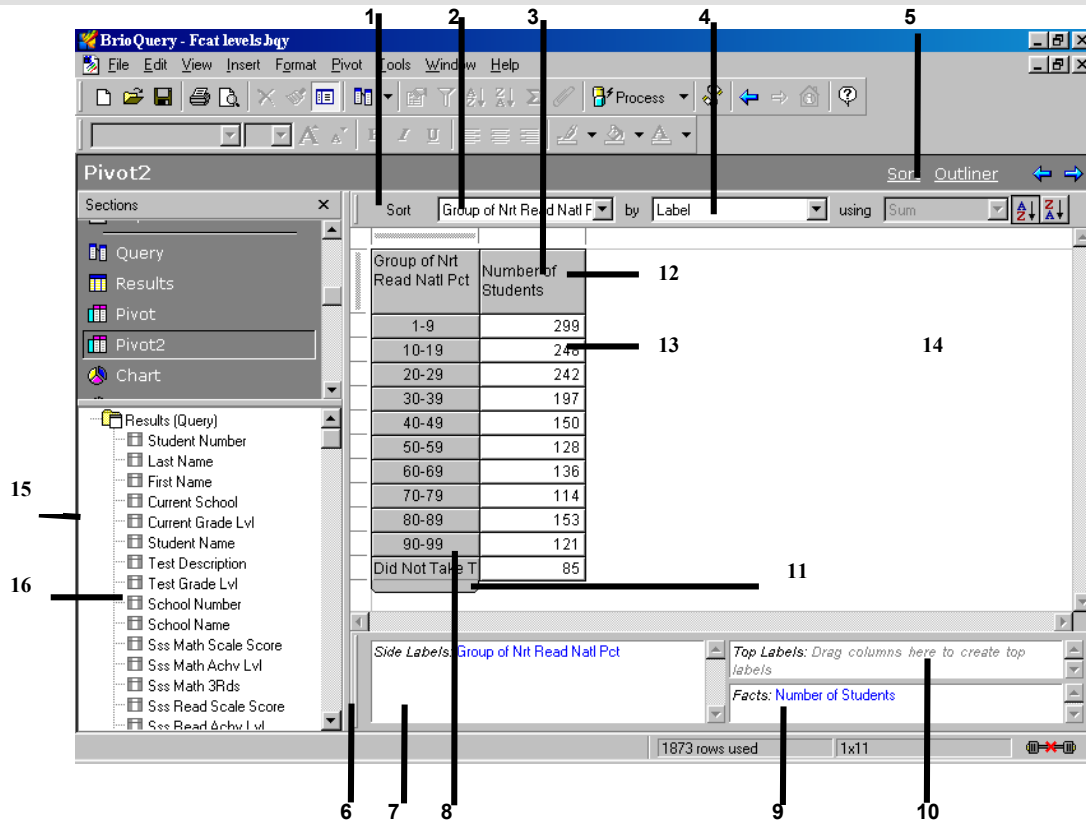
1	Sort line	9	Facts pane in Outliner
2	Sort item	10	Top labels pane in Outliner
3	Top labels	11	Dimension tab
4	Sort type	12	Data labels
5	Outliner & Sort buttons	13	Facts
6	Outliner	14	Content pane
7	Side labels pane in Outliner	15	Catalog pane
8	Side labels	16	Results columns

Chart Section
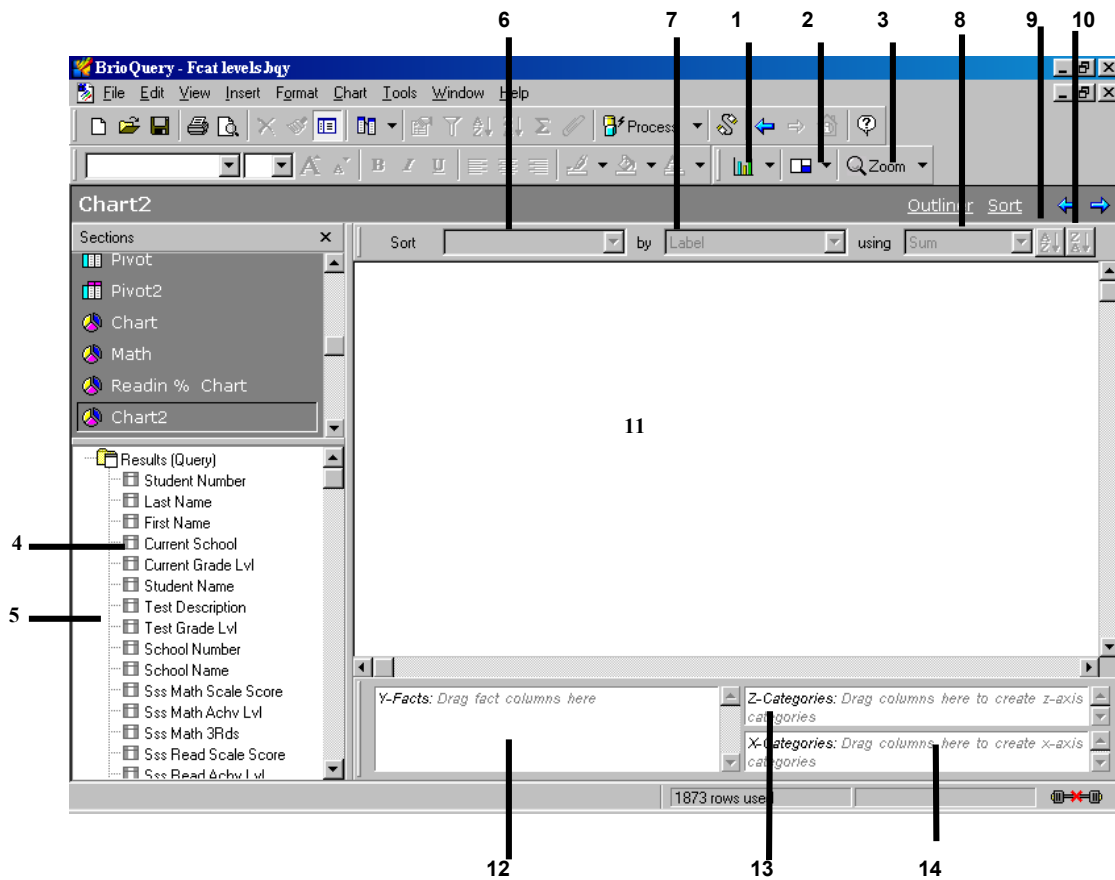
1	Chart type button	8	Sort aggregate
2	Legend on	9	Sort Order Ascending button
3	Zoom button	10	Sort Order Descending button
4	Catalog pane	11	Content pane
5	Results columns	12	Y-Facts pane in Outliner
6	Sort item	13	Z-Categories pane in Outliner
7	Sort type	14	X- Categories pane in Outliner

Chart Section (Continued)

Reading Achievement Levels
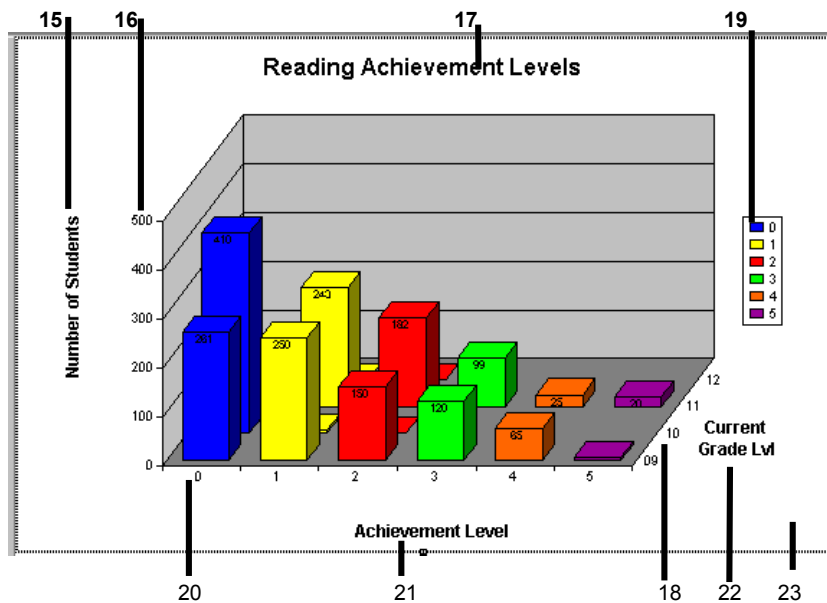
15	Y-Axis label
16	Y-Axis values
17	Chart titles
18	Z-Axis values
19	Legend
20	X-Axis values
21	X-Axis label
22	Z-Axis label
23	Chart area

Report Section
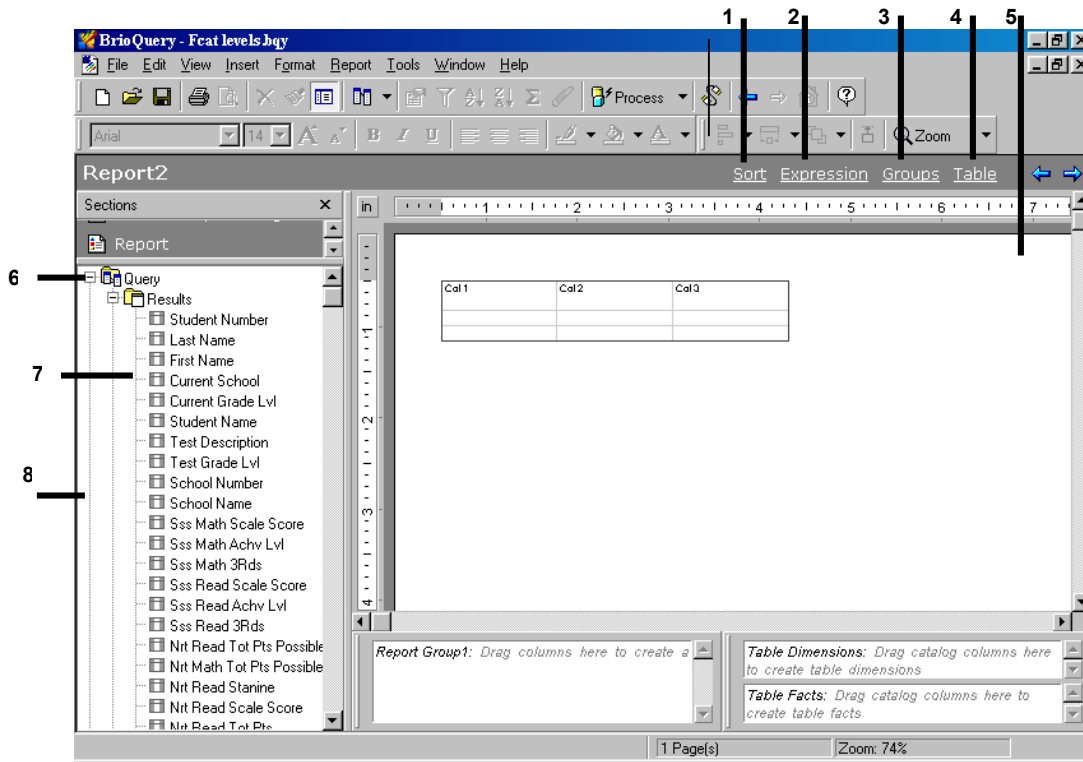
1	Sort button
2	Expression button
3	Groups button
4	Table button
5	Content pane
6	Sections
7	Results columns
8	Catalog pane

Report Section (Continued)
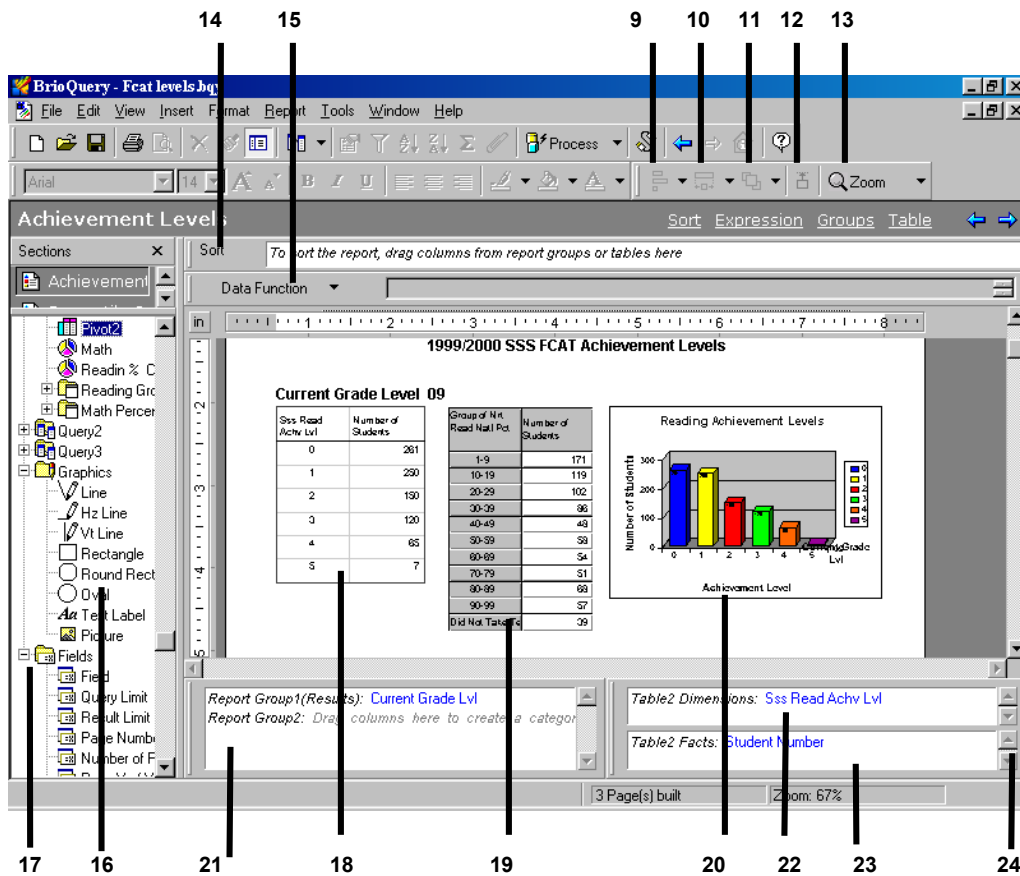
|			
9	Align button	17	Report fields
10	Resize button	18	Columns
11	Layer	19	Embedded pivot
12	Set Spring button	20	Embedded chart
13	Zoom button	21	Groups Outliner
14	Sort line	22	Table Dimensions pane of Table Outliner
15	Expression line	23	Table Facts pane of Table Outliner
16	Graphic items	24	Table Outliner

EIS Section
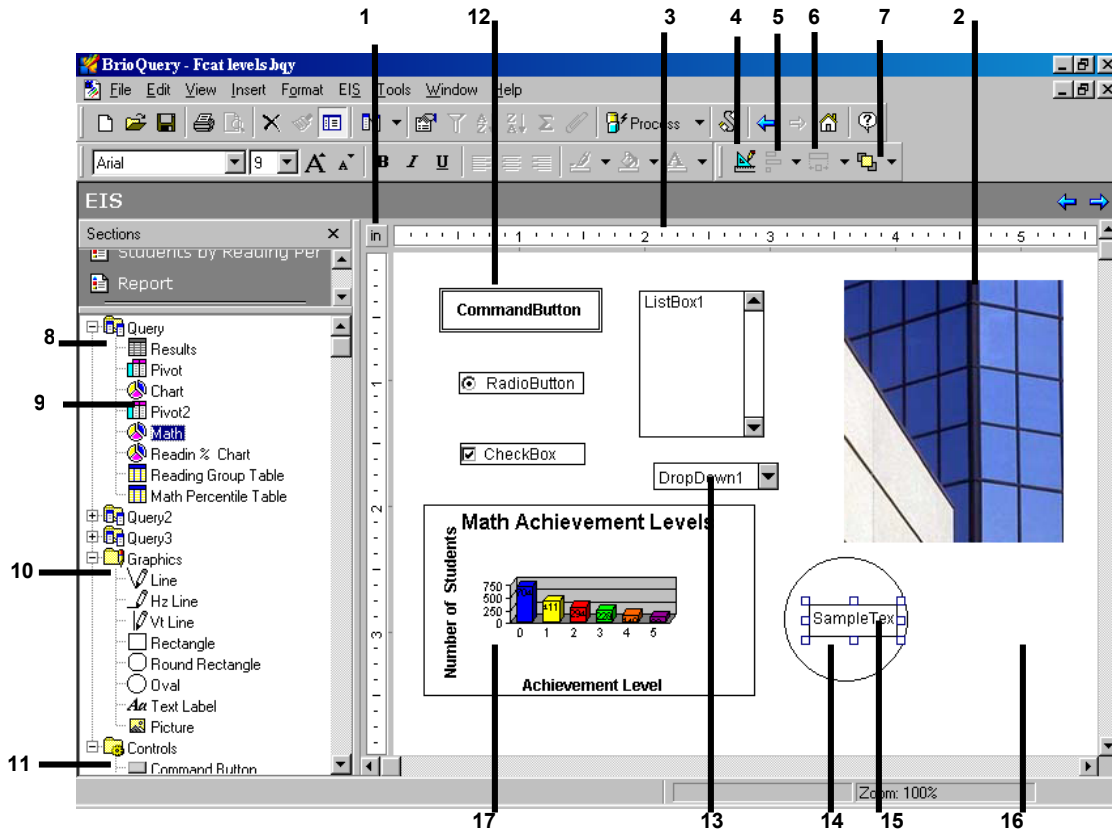
1	Ruler Units of Measurement	10	Graphic items
2	Embedded picture	11	Control items
3	Ruler	12	Embedded Command button
4	Design/Run button	13	Embedded dropdown list
5	Align	14	Embedded graphic
6	Resize button	15	Embedded text
7	Layer	16	Content pane
8	Catalog pane	17	Embedded chart
9	Sections		

Appendix B - The Data Warehouse Website

Everything you want to know about the Data Warehouse can be found on our website:
http://web/dwh
This should be your first choice for finding information about anything and everything.
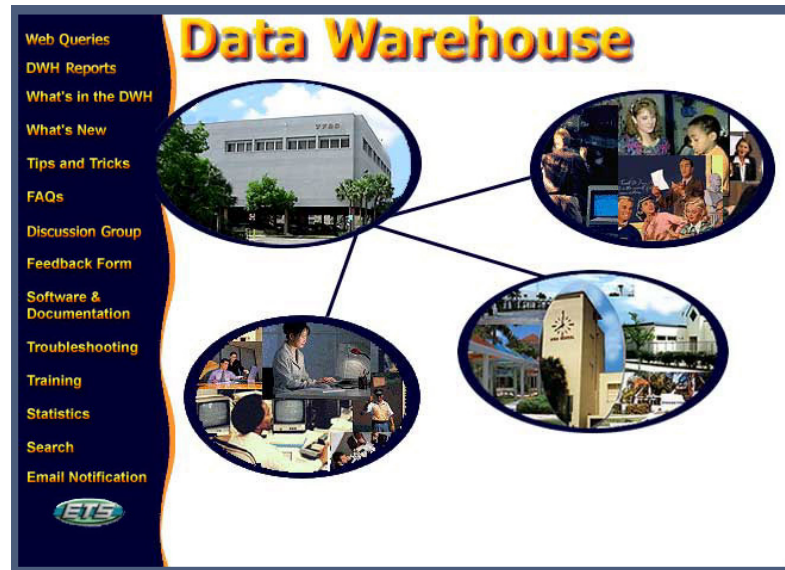
Web Queries
Run Brio Queries on the Intranet. Selected queries are available for you to process with your criteria without the need for the Brio client software on your computer.

DWH Reports
Special reports for each school will be run at the district Data Warehouse and will be posted in Acrobat Reader (pdf) format.   These reports can be viewed or printed by each school.

What's in the DWH
Information on a varied group of topics is kept at this location. You can find a list of all the tables in the Warehouse, their descriptions, all the elements in each table, and descriptions of the elements themselves. In addition, you can find detailed information on the tests and subtests, including the codes, test names, subtest names and which fields are available for each test.

What's New
All additions and updates to the Data Warehouse and Brio will be posted here.

Tips and Tricks
Do all those little things that help make your queries special. Easily do those more difficult tasks. Additionally, it is sometimes useful to have a list of students whose

information you may want to reference on a continual basis. Instructions for creating a "student list" are also at this location.

FAQs (Frequently Asked Questions)
Any general question that you have will probably have an answer here. This section is divided into four parts: *Access to the System, Hardware & Software Installation and Download, Information on the Data,* and *Miscellaneous.*

Discussion Group
Submit your ideas and discuss with others your experiences with the data warehouse.

Feedback Form
Any comments, suggestions, or additions you would like to see made to the Data Warehouse should be posted here. Your feedback is highly valued, and is reviewed daily.

Software & Documentation
Instructions for installing and/or upgrading Brio are available at this site.

Any of these instructions may be retrieved through the Intranet in "PDF" format. The use of this technology ensures that each document retains its original format features. Viewing and printing these instructions will require that your computer have the "Adobe Acrobat Reader 4.x" application installed. If you do not have Acrobat Reader, there is a link to the Adobe site to download the reader to your computer.

Troubleshooting
If you have problems with installation or access to the Data Warehouse using Brio, you can find many of the answers already listed here. The four sections *(Login Problems, Error Messages, Installation Problems, and Miscellaneous)* are complete with diagrams and pictures to make any problem easier to correct.

Training
Instructions for signing up for Brio training and the training schedules are listed here.

Statistics
Statistics on the Data Warehouse are maintained here.

Search
Search for anything on the Data Warehouse Website.

Email Notification (of Changes & Updates)
If you would like to be notified immediately of any updates, modifications and problems, sign up for email notification. In addition, when the system is going to be taken down for service, a notice will be sent out.

NOTES