

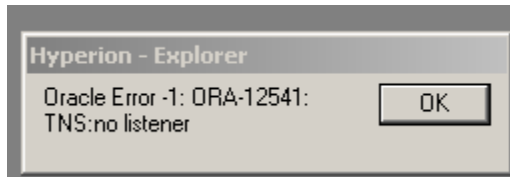
1. Data Warehouse
 - a. Nightly download of last approved transaction
 - b. Quarterly data is saved in historical file with PSQ prefix
2. Start

- a. If your BRIO configuration involves SSH tunneling, click on SSH icon and sign in using your UH username and password.

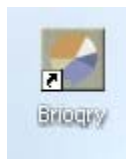


Icon:

If you do not first logon using Secure Shell Client (if it has been installed on your workstation), after you sign into BRIO you will get the following error.



- b. To start BRIO, double click on BRIO icon.



Icon:

- c. Under “Create a Document”, select DEFAULT.OCE.
- c. Sign in using your HR datawarehouse username and password. This may not be the same as your UH username and password.
- d. Click on “Tables” on left bar.



e. Double click on requested table:

PSEMPL = employee data

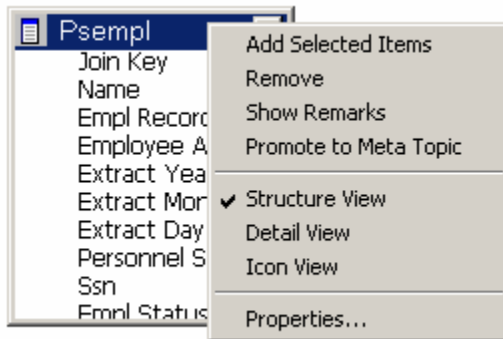
PSPOSNA = position data with budgeted account code information

PSPOSNM = main position data file

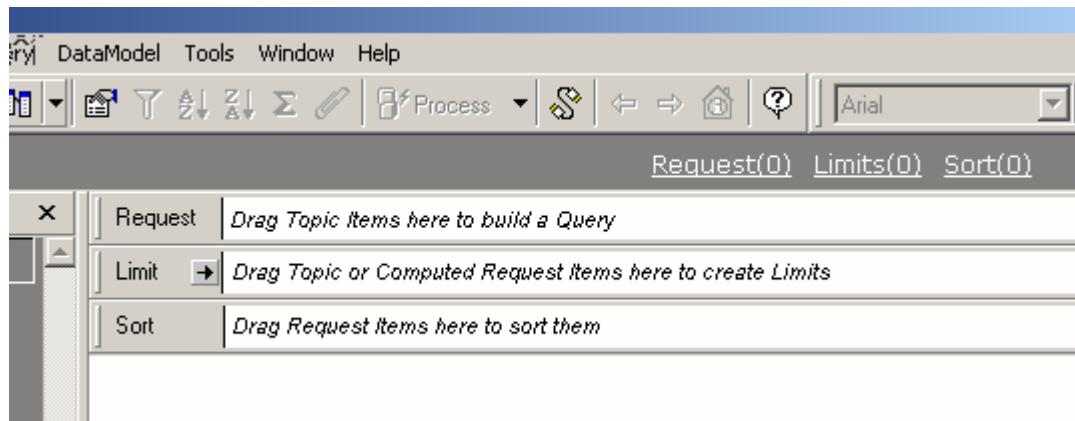
PSACCT = account code information (account code that the employee actually gets paid from)

Quarterly frozen files have PSQ prefix (March, June, October, December)

f. Optional: Right mouse click on the selected TABLE name. Select “Properties”. Click on “Sort” button to sort data fields list. Click “OK”.



3. REQUEST, LIMITS, SORT lines



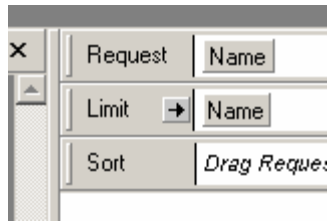
If the Request, Limit or Sort lines are missing on the left side, you can make them appear by clicking on the Request, Limit and Sort lines on the upper right.

a. REQUEST – data that you want listed in your report. Click on the appropriate data field from the TABLE listing and drag the data field to the REQUEST line.

- b. LIMIT – limit your query based on a selection criteria entered in popup box:

The screenshot shows a dialog box titled "Limit: Name". It features a "Name" text field containing "Name", an "Include Nulls" checkbox (unchecked), and a "Not" checkbox (unchecked). A pull-down menu is set to "Begins With". Below these is an empty text input field. To the left of this field are buttons for "Show Values", "Custom Values", "Custom SQL", "Select All", and "Remove". To the right are "OK", "Cancel", "Ignore", and "Help" buttons. A list box below the input field contains "AS", "BE", and "CE", with "AS" and "CE" highlighted. An "Advanced" button is located at the bottom right.

1. Double click on a data field that you want to limit on from the TABLE listing.
2. Select limit condition (eg., = Equal, Between, etc.) from pull down box. Click "Not" clickbox to indicate "not equal" or "not between" or "not include nulls", etc.
3. Input selection values separated by commas (eg., CAMPUS KEY = MA,LE,HI). Click the check mark to accept the values; Click "X" to delete entry. Values will appear in box below after clicking check mark. The values listed for a specific data item are used in an "OR" condition (Name begins with "AS" OR "CE" in above example)
4. Use your SHIFT and CTRL keys to select a range or select specific values (just like any other Windows application)
5. Only values highlighted in box will be used in the LIMIT criteria. In the above examples, although there are 3 values listed, only names that begin with AS and CE will displayed in the RESULTS. Values not highlighted will be ignored and not be included in the final RESULTS.
6. Click SELECT ALL to select all values in box below; click REMOVE to erase all values in box below.
7. Click on right arrow to the right of the "LIMIT" line on the main REQUEST panel to allow for parenthetical pairings. Click on the data fields that you want the parenthesis to enclose and then hit the "(" key. To delete the parenthesis, click on a parenthesis and hit the ")" key.



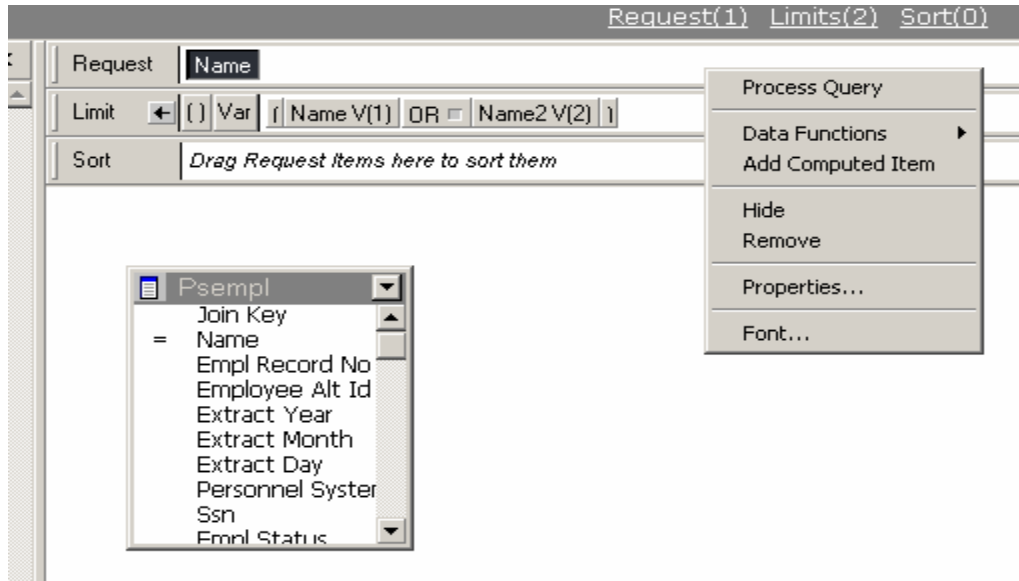
7. Click on “AND” button to change to “OR” condition.



Special notes:

1. Null values are used to check for data fields with no data in them.
 2. Data entered is case specific. In most cases, it should be all CAPITAL letters.
 3. To temporarily IGNORE a specific limit before hitting the PROCESS button, hit the “Ignore” button after double clicking on the appropriate LIMIT data field.
- c. SORT – sort returned data in ascending or descending sequence.
1. Drag data field to be sorted from REQUEST line. DO NOT drag from TABLE listing.
 2. Double click on data field to toggle between ascending and descending sorts (arrow direction will change)
 3. Data will be sorted from left to right on the SORT line.
 4. Drag and drop in order to rearrange the SORT order.

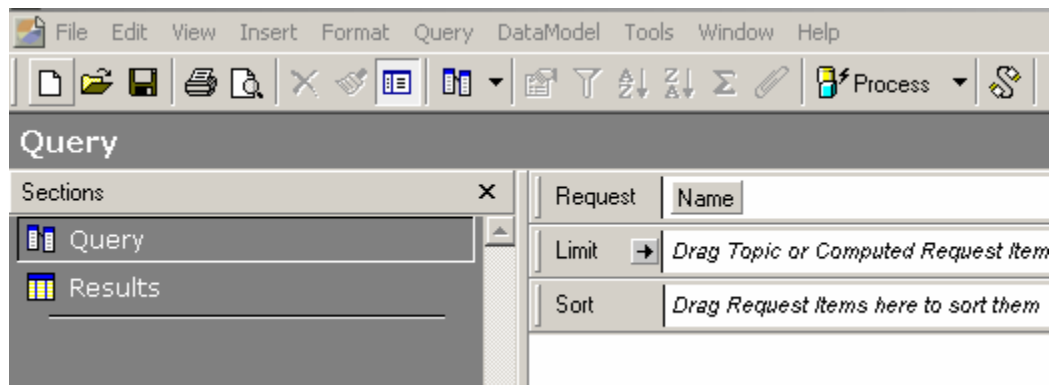
- d. Additional Notes on REQUEST and SORT lines:
1. Right click on the mouse button at different locations on the screen will display additional options specific to that feature you are clicking on.



2. To delete data field from one of the lines, click data field and either press the delete key or right click on the mouse button and select REMOVE.

4. PROCESS Button

Press the PROCESS button on the command line to execute the query. Results of query will be displayed under RESULTS. Can toggle between RESULTS and QUERY on left panel by pressing either RESULTS or QUERY. Total number of records retrieved displayed on bottom line. Click PROCESS button whenever the REQUEST line changes to get new data from database.



Results in:

Limit	Name
	Name
1	CERNY, JO ELLEN
2	CERNY, GERALD J
3	CERIA-ULEP, CLEME
4	CERELEJIA, SUNNY
5	CELIK, NURI

Note: Highlight a column, right click the mouse button and select Format / Suppress Duplicates to suppress duplicate data items (eg., same name in 2 different records)

Empl Record No	Name	Eac
	Name	
	LAWRENCE, MARK G.	
	LATNER, JANET D	
	LAMPE, WILLIAM A	
	LAM, PUI KWONG	
	LA CROIX, SUMNER J	
	KWAK, SALLY Y.	
	KUMASHIRO, KRISTIN	
	KUMARAN, MUTHUSA	
	KIMURA, EHITO	
	LITTLE, ROBERT D	
	LIU, ROBERT SHING-H	
	LOWRY, GORDON K J	
	MOODY, MARC A	
	MONCUR, JAMES E	
	MINKE, KARL A	
	MINERBI, LUCIANO	15M09 09

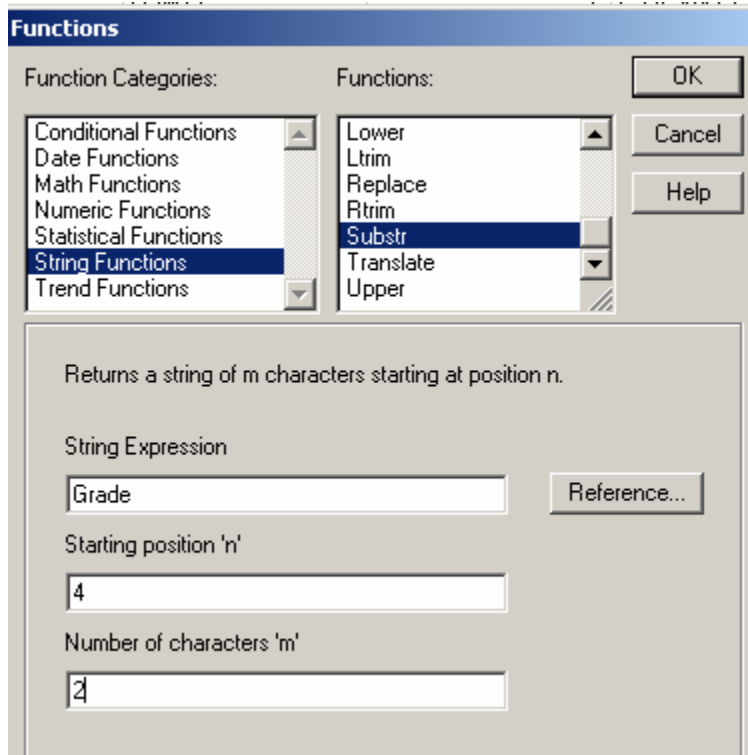
6. Add Computed Item

Purpose: to create another column where data can be manipulated in cases where the default brio functions do not suffice.

Example: stripping out the last 2 characters from faculty rank in order to separate 09 from 11

1. Right mouse click and select Add Computed Item.
2. Change NAME to descriptive name of new field.

3. FUNCTIONS – select from list of Functions
4. REFERENCE – select from list of values from REQUEST line.



Results in:

Name	Grade	Monther
MAYNARD, SHERWOOD D	S5M11	11
HUNTER, CYNTHIA L.	I3M09	09
TERAMURA, ALAN H	I5M11	11
DUFFY, DAVID C	I5M09	09
MERLIN, MARK D	I5M09	09
KEELEY, STERLING C	I5M09	09
SAEPHAN, YING F	R2M11	11
WEBB, DAVID T	I3M09	09
SACK, LAWREN	I3M09	09
NIINEMETS, ULO	I5M09	09

Other Functions available:

- Numeric – Averages
- Statistical – Min, Max, Standard Deviation
- String – Substr, Left, Right, Concat

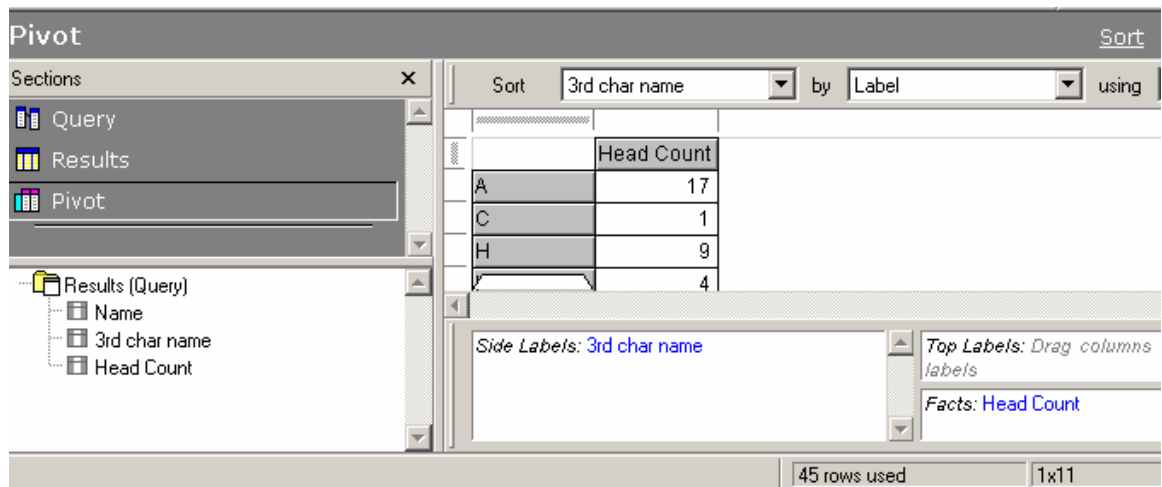
7. Other Notes

- a. Make adjustments to QUERY – click on QUERY in left window and hit PROCESS. Data is brought down only after hitting the PROCESS key.
- b. Export data to Excel – On command line, click FILE / EXPORT / SECTION. File type is Excel.
- c. Quickie notes on Data:
 - 1. Multiple Appointments – Use Limit on data field HEADCOUNT=1 for single count. Be aware that data fields are filled for EMPLOYEE RECORD NO = 1 and blank for other appointments (eg., SALARY TOTAL MONTHLY ADJUSTED)
 - 2. Salary Annual and Salary Monthly are unadjusted for FTE.
 - 3. Non-Compensated Employees have zero salaries – Use limit on data field JOB CODE = NC
 - 4. Active employees – Use limit on data field EMPLOYEE_STATUS not = T (terminated status).
 - 5. For quarterly files, use EXTRACT MONTH (eg., 03, 06, 10, 12) and EXTRACT YEAR (eg., 1999) to look at specific historical data. If not specified, a **VERY LARGE** dataset could possibly be downloaded.

Can also use QTR YEAR to limit records.

1 char – QTR (1=mar, 2 = jun, 3 = oct, 4 = dec)
4 char – YEAR (eg., 2004)

8. Pivot Reports – To produce summary data.



- a. On the command line, click INSERT/NEW PIVOT

- b. Requested RESULTS displayed on left window.
- c. Drag data fields from RESULTS list to the 3 boxes on the bottom window to create pivot report.

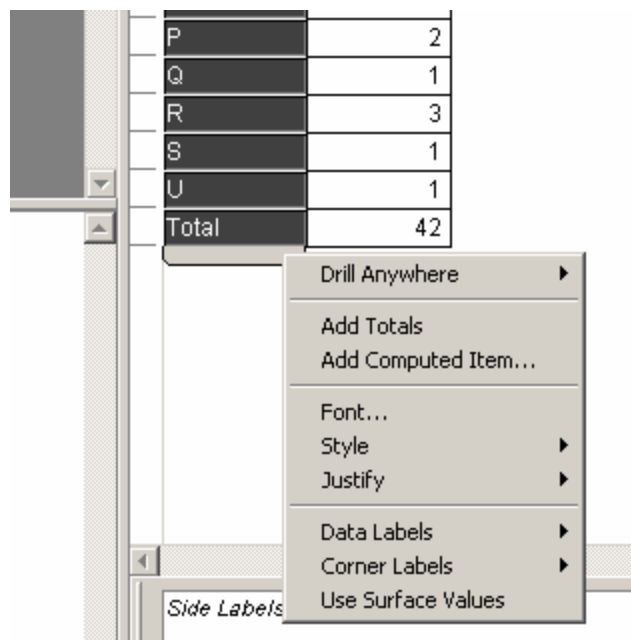
Side Labels – what data do you want summarized (eg., age)

Top Labels – secondary data that you want summarized (eg., BU code)

Facts – data that is calculated for a summation (eg., headcount, FTE)

Note: can use either Side or Top Labels; using both is optional. Not necessary to use all data fields in RESULTS. Add additional data fields to Side or Top for finer record counts.

- d. Manually Group similar data by:
 1. Holding CTRL key down and select individual data fields OR holding SHIFT key down and selecting a range of data fields.
 2. To group selected data fields, select fields as in step a above and hit CTRL-G to group selected data fields. Data will be combined and field name prefixed with “*”. Double click on field name to change literal.
 3. To ungroup data fields, select grouped field and hit CTRL-U. Data fields will be unselected and highlighted.
- e. Display Totals by columns and rows:



1. Right click on gray tabs at the extreme right of the heading row or at the bottom left of the heading column.
2. Select “Add totals” from pull down box.

3. Totals can be computed for each gray tab displayed on a heading row and/or column.
 4. Double click on the word “Total” to change the literal.
9. Join Tables – to create one report using matched/unmatched data from 2 separate tables. Tables will be linked by a data field that exists in both tables (eg., ssn, position number).
- a. Double click on selected tables (eg., PSEMPL, PSACCT). Both tables will be displayed.
 - b. Decide on the common data field existing in both tables to link both tables (eg., position join key)
 - c. Use pull down boxes on both tables to display data fields
 - d. Click on table 1 data field (eg., SSN) and drag to same data field in table 2 (eg., SSN)
 - e. Line will be drawn between the 2 joined data fields. Double click on the joined line to select a join criteria (eg., you only want a result dataset with data that exists in both tables).

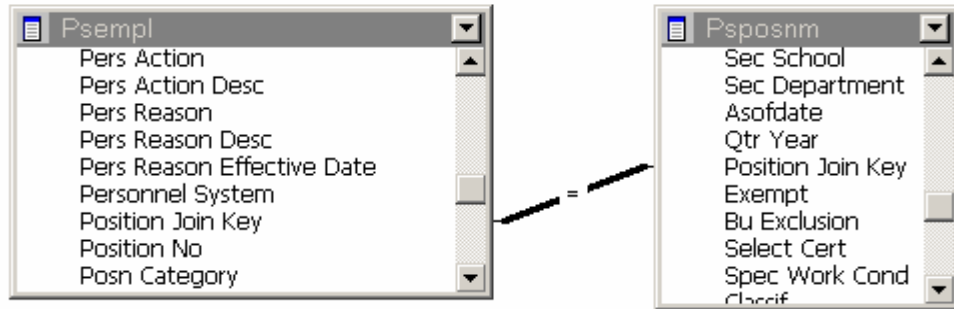
JOIN KEYS available for linking tables:

Join Key =

- extract year (1 char)
- extract month (2 char)
- ssn (9 char)
- employee record no (1 char)

Position Join Key =

- Quarter (1 char)
- Year (4 char)
- Position number (8 char)



Join Properties

Join Type

Simple Retrieve rows where joined columns match values.

Left Retrieve all rows from Psemp1 and those rows from Psposnm which have matching joined column values.

Right Retrieve all rows from Psposnm and those rows from Psemp1 which have matching joined column values.

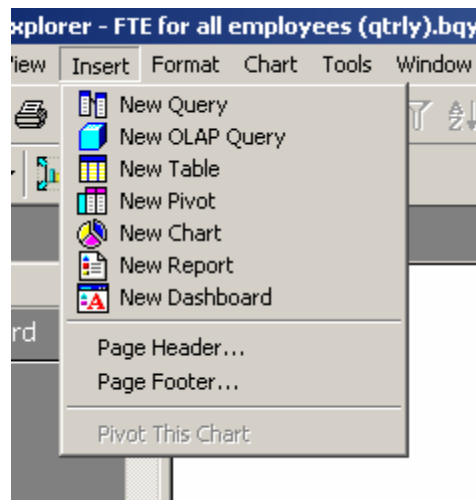
Outer Retrieve all rows from both tables matching joined column values if found or retrieve nulls for non-matching values.

Equal

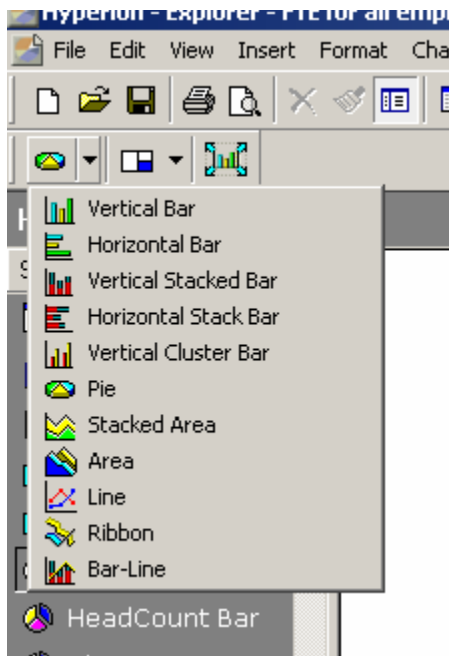
OK
Cancel
Help

10. Graphs

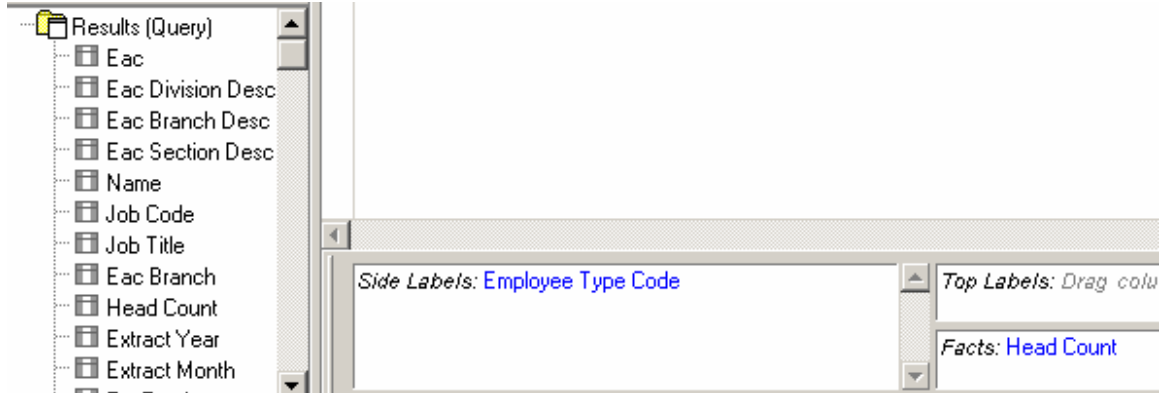
- a. On the command line, select Insert / New Chart



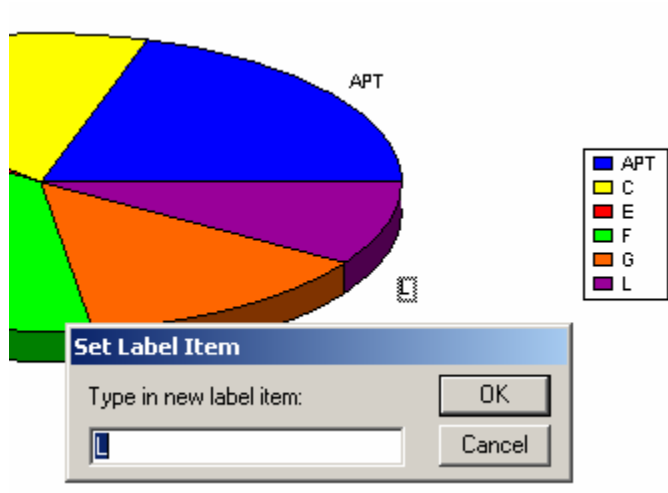
b. You may select from a variety of Charts:



c. Pull data items from the left margin to the boxes on the lower right to populate the various sections of your graphs.



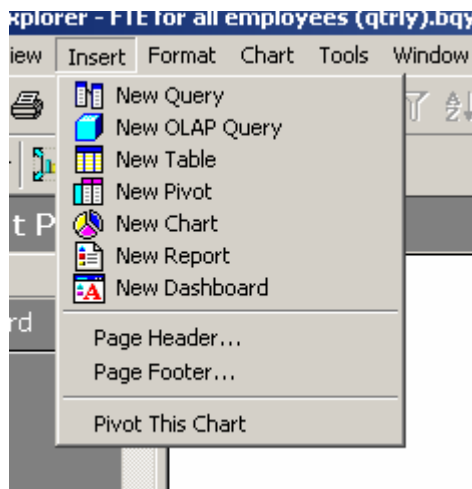
- d. Double click on text on the Graphs to display information



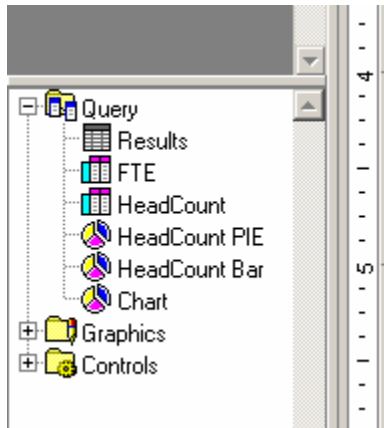
11. Dashboard

Quick method to display information on one page. If the query is changed and the PROCESS button is hit, all data on the dashboard will reflect new information.

- a. On the command line, select Insert / New Dashboard



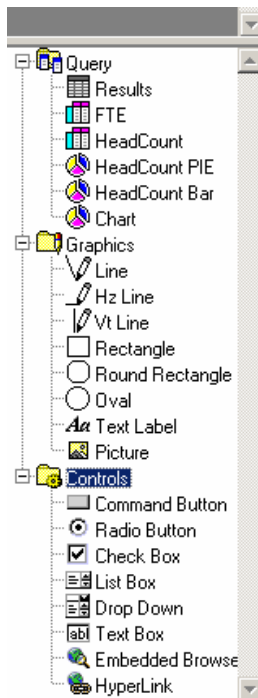
- b. Pull items you want displayed on your dashboard from the left margin onto the Design page on the right:



- c. To enter design mode, press the "triangle and pencil" icon

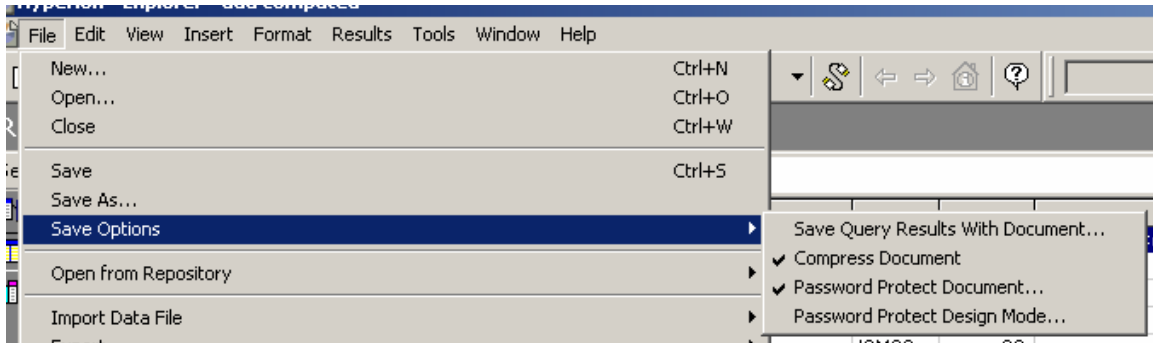


- d. Other options available to spice up your dashboard:



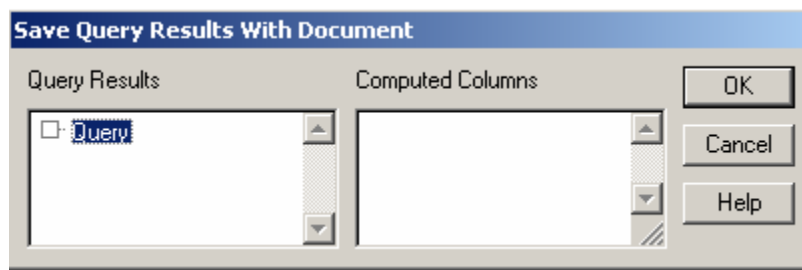
12. Save your files

Command line: File / Save as. Files are stored with a .BQY extension. There are different options for saving data.



a. Not save data with your .BQY file

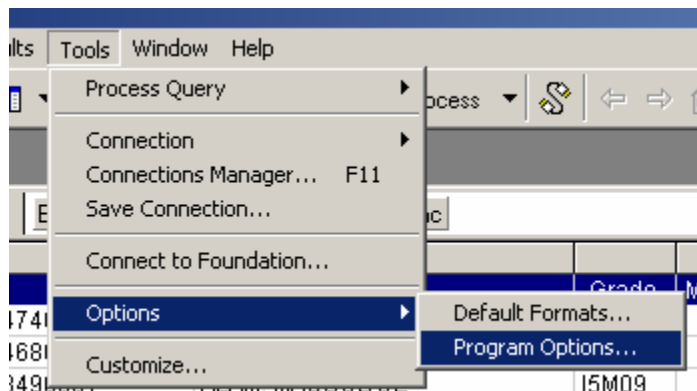
Select “Save Query Results With Document” under “Save Options.” Under the Query Results column, unclick the box next to “Query”. This will save tons of space and also keep your data secure in case your workstation is stolen.



b. Password Protect Document

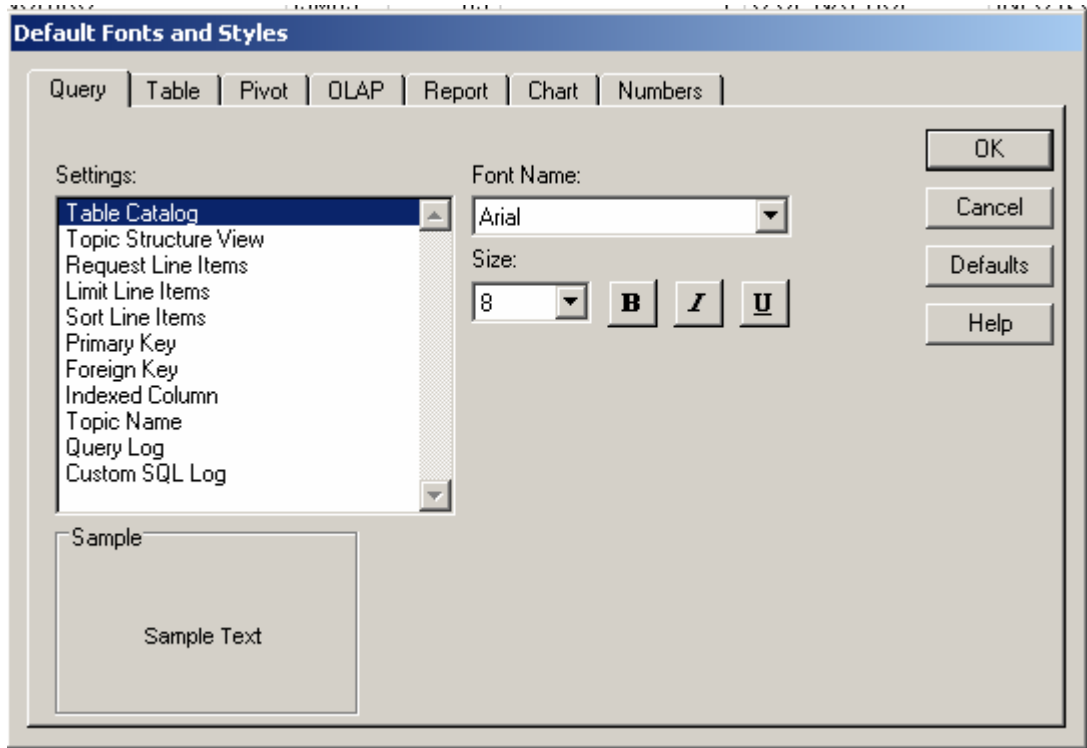
Require a password when running the query. Do not forget your password and once applied cannot be undone.

12. General Options



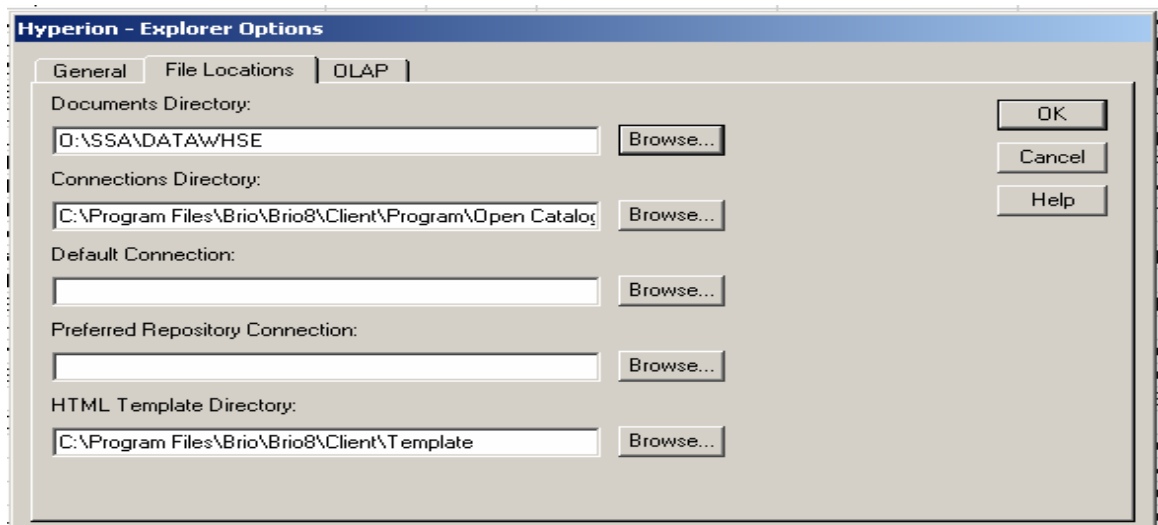
Various options available that setup your default parameters when you run a query.

a. Select Default Formats



b. Select Program Formats

Most times you want to change the Documents Director to specifically point to your directory of .BQY files



11. For Help:

- a. HRIS hotline – 956-7798
- b. Steve Yamada's email address – syamada@hawaii.edu
Carole Teshima's email address – cteshima@hawaii.edu

Multiple Appointment / Salary Example - 3 Appointments - 2 Faculty, 1 Lecturer

Employee Record Number	Grade	FTE Person	FTE Total	Salary Annual	Salary Monthly	Salary		HeadCount	Employee Type Code
						Adjusted Monthly Salary per Appt (computed field)	Total Monthly Adjusted		
1	I5M11	0.5	0.96429	125,465.64	10,455.47	5,227.73	8,565.63	1	F
2	I5M09	0.25	0	107,674.32	8,972.86	2,243.22	0.00	0	F
3	LC	0.21429	0	0.00	1,094.68	234.58	0.00	0	L

Notes:

- Employee Record Number is reflected in PeopleSoft as "0" and "1" in DataWarehouse.
- Multiple Appts
 - FTE Total and HeadCount are zero for other than appointment 1
 - Salary Total Monthly Adjusted = 0 for other than appointment 1
 - Appointments in other jurisdictions can be identified if the sum of FTE Person for all appointments does not equal the FTE Total field
- Salary Annual is the full-time salary for that appointment; Lecturer salaries are Zero.
- Salary Monthly is the Salary Annual divided by 12
- Adjusted Monthly Salary per Appt is a Brio Computed Field

$$\text{Adjusted Monthly Salary per Appt} = \text{FTE Person} * \text{Salary Monthly}$$

The Salary Monthly for Lecturer appointments represents the total salary that should be paid for the lectureship. To correct this Brio Computed Field (Add Computed Item) to reflect this, change the Computed Item to:

if (Employee_Type_Code == 'L') {Salary_Monthly} else {Salary_Monthly * Fte_Person}

Employee Record Number	Grade	FTE Person	FTE Total	Salary Annual	Salary Monthly	Salary		HeadCount	Employee Type Code
						Adjusted Monthly Salary per Appt (computed field)	Total Monthly Adjusted		
1	I5M11	0.5	0.96429	125,465.64	10,455.47	5,227.73	8,565.63	1	F
2	I5M09	0.25	0	107,674.32	8,972.86	2,243.22	0.00	0	F
3	LC	0.21429	0	0.00	1,094.68	1,094.68	0.00	0	L

- Salary Total Monthly Adjusted is the sum of all the Adjusted Monthly Salary per Appt data EXCEPT for Lectureships. For the Lectureship appointment, the Salary Monthly is used.

$$8,565.63 = 5,227.73 + 2,243.22 + 1,094.68$$