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BRIQ REFERENCE
FOR THE
HR PROFESSIONAL

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WHO DO I CONTACT?

For issues with Brio, Passwords, Login issues, etc. contact:

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For issues with SCUPPS or SCUPPS data contact:

HR Helpdesk
 SCUPPS/SEMA4 Services Unit
 Office Of the Chancellor, Human Resources
 Wells Fargo Place
 30 East Seventh Street, Suite 350
 St. Paul, MN 55101
 hr.helpdesk@so.mnscu.edu



FREQUENTLY ASKED QUESTIONS

My screen is only displaying the Request Line. How do I get the Limit Line or Sort Line to display?

Go to the right hand side of your screen on the gray bar where the two blue arrows are located, click on Limit to display your Limit Line. You can also do the same thing to display the Sort Line.

I got an 'Unknown Error' when trying to process a query. What happened?

This error occurs sometimes when processing a query, saving or closing a document. If you click 'Ok,' your computer will shutdown automatically. To avoid this, hold the <Tab> key, then click 'Ok.' This may prevent the computer from shutting down and should allow you to continue to process, save, or close your document. However, this does not always work, so remember to save your work often.

Which query should I go to get the data in SCUPPS?

Use the HR SCUPPS Data query. This query has most of the fields that are in SCUPPS. There is a combination of canned reports (where you can just click 'process' and the results are there) and reports you can build for your specific data needs.

Where else do my employees work within Minnesota State Colleges and Universities system?

Check out the new and improved HR Multiple Appointments query. This report shows employees with assignments at more than one college/university within a fiscal year. You can also use this report to assist you in calculating insurance and retirement eligibility. It is recommended that you take a look at this query at least once during a pay period.

What are the queries in the HR Reconciliation folder used for?

Within the Reports HR Campus folder you will find several sub-folders, one called 'HR Reconciliation.' The queries in this folder were built to assist with completing the HR Dashboard project. These queries are all 'exception reporting' type queries – *you will only see results if there is an error.*

What are some examples of 'private/non-public' data?

Examples of 'private/non-public' data include: SSN, age, race, ethnicity, gender, citizenship, visa status, veteran or disability status, employee home address/phone, and employee dependent information.

BRIO GENERAL INFORMATION

Brio Website:

Brio is the extract tool that connects the Operational Database and has many features such as data extraction, pivot tables, and charts/reports. You can find the Brio login page here:

<http://www.its.mnscu.edu/reportanddataservices/datawarehouse/index.html>

Security:

One way to access data for querying is to connect to a database that's on the same network to which your computer is connected. Connecting to the database means that you've provided a username and password to prove that you have authorized access and that you can run queries and retrieve data.

Before you can access Brio or the Operational Database you must complete the Operational Database Security form which can be found here:

<http://www.its.mnscu.edu/security/securityforms/mnscuinfosystems/pdf/REPLSecurityFormV3-3.pdf>

Installing Brio/Plugin:

The first time you log into Brio, you will be prompted to install a web plugin. This is an easy one-time installation. NOTE: If you have a pop-up blocker on your computer, you will need to have it disabled to install the Active-X controls and plug-ins.

Login:

Click the "Data Warehouse Login" link to the right of the Hyperion logo. This requires a user name and password. The username is the first 6 (six) letters of your last name and the first 2 (two) letters of your first name [all lowercase]. The password will be provided to you once you have submitted the proper Operational Data Security form.

Passwords:

Brio and the Operational Database are two (2) separate entities. Brio is the software used to retrieve data from the database and the Operational Database is where the data resides. Each process requires a separate login. When you change one password, it does not dynamically change the other password. Each password must be changed independently. The Brio password



BRIO GENERAL INFORMATION

password does not expire. The Operational Database password expires every 90 days. It is recommended that when you change your Operational Database password, you also change your Brio password at the same time to keep them in sync and less confusing.

Password Format:

Your password must be at least 8 (eight) characters long and contain BOTH letters and numbers. It CANNOT start with a number.

Changing Passwords:

To change the Brio password, log into Brio: Click the 'PREFERENCES' button on the top blue line above the words 'Operational Data.' Then click on 'general preference' in the left column. The dots in the 'current,' 'change,' and 'confirm' spaces are just placeholders. You will delete these and type in your current password, and then enter your new password in the next 2 (two) spaces. When you have completed the password entry, click 'SAVE PREFERENCES.'



DO NOT ENTER OR CHANGE ANYTHING in the 'Default folder' or 'Email address' spaces. **DO NOT check** the box in the '508 Compliance Preferences' section.

To change your Operational Database password: Click on the 'Oracle Password Change Form' link: https://extracts.mnscu.edu/password_change.htm

Once you have logged into Brio, you will find a link on the right called 'Data Warehouse Check Password Expiration' in the center section of the webpage. This will give you the date that Operational Database password will expire.

CAUTION!

Private/non-public data should never be emailed (including attachments) because it is not secure and subject to being hacked. See page 18 for examples of 'private/non-public data.'

FREQUENTLY ASKED QUESTIONS

Where can I get the Operational Data Security Request Form?

To access the data within Brio, you will need security clearance. The form is located <http://www.its.mnscu.edu/security/securityforms/mnscuinfosystems/pdf/REPLSecurityFormV3-3.pdf>. Once your security has been given, you will receive an email with your user ID and password. Then you can query for data through Brio.

Where is the Brio homepage located?

To log into Brio, go to the URL <http://www.its.mnscu.edu/reportanddataservices/datawarehouse/index.html> and enter your user ID and password. Viola, you can now query for data!

How often is the data in Brio refreshed?

Since HR data is a little more complicated than other data, the refresh is not instantaneous - but refreshed within 24 hours. So there may be a one day lag from when you entered data into SCUPPS and when you see the data in Brio.

Does my Brio password ever expire?

There are two places where you have to enter your user id and password. The first place is to get into the Brio software program. That password is not set to expire. The second place is to get into the actual Oracle database. This password is set to expire every 90 days. If you forget your password, you can email Karen Cejka, karen.cejka@so.mnscu.edu to have both reset.

How do I cancel a query once I have clicked 'Process?'

Hold down the <Alt> key and the <End> key until the query is canceled.

How do I rename a field?

Double-click on the field to rename and type the new name in the prompt box.

CAUTION!

Private/non-public data should never be emailed (including attachments) because it is not secure and subject to being hacked. See page 18 for examples of 'private/non-public data.'

BRIQ PIVOT SECTION

Hiding and Focusing on Data :

The Hide and Focus features are useful when you need to emphasize a subset of data and want to eliminate distracting detail. When you find a specific item that you want to learn more about, such as job class code, you can drill down into the item label. You can drill down on more than one item as well as drill down on all items at the same time. Every time you select a specific label in a dimension row or column, you show only the data for that label value.

Focus on Data:

The 'Focus On' feature allows you to look at specific fields within the Pivot Section. For example, you only want to look at faculty, you would choose the appropriate job class code and 'focus on' that field to get all the faculty. *This feature can only be done in the Pivot Section of the document.*

To 'focus on' a data field:

- Click on the field you want to 'focus on.' To 'focus on' more than one item, hold the <Ctrl> and click on the fields you want.
- Right-click on your mouse and select 'focus on' and the results show only the ones that match the field you chose.
- To cancel this feature, highlight the data field in the outliner and right-click on your mouse, click on 'Show Hidden Items.'

Hide Item:

The 'Hide Item' feature allows you to hide one or more data fields at a time.

To 'Hide Item':

- Click on the field you want to 'hide' and right-click on your mouse to choose 'Hide Item.' To 'hide' more than one item, hold the <Ctrl> and click on the fields you want.
- To cancel this feature, highlight the data field in the outliner and right-click on your mouse, click on 'Show Hidden Items.'

BRIQ DOCUMENTS

The root directory lists all the available documents and folders you have authorization to access. Within the root directory you will also have subfolders. Documents that are not within a subfolder will be listed in the center section. Folders that are labeled FY20XX have fiscal year specific data only. Those not in FY20XX folders contain multiple fiscal year data.

Documents contain the queries, results, pivots, charts, and reports. You can click on the document name or the '.bqy' to open it. This will open a temporary copy of the document. This means you cannot change the web version nor save the changed document back to the web. *The changes you make affect only your copy.* If you want to save the changes you have made to a document, you must save it to your local (C or D) drives or local network drive.

Saving a Document:

When you are saving a document, you are saving the format or the template and the data. You can save a document two ways: without the data and with the data.

Save document without data:

- To save a document template, click 'File' on the toolbar and then click 'Save As'
- A pop-up box will appear, allowing you to save the document in the '.bqy' format
- Type in the name of your document and choose the location of where the document will be saved. Typically, you will save your documents on your local network.
- Click 'Save' and your document is saved.

Save document with data:

- To save a document template, click 'File' on the toolbar and then click 'Save Options'
- A pop-up box will appear, allowing you to save the query results by checking the box and then click 'Save.'
- Click 'File' on the toolbar and then click 'Save As.' Your document will then be saved with the results.

BRIQ DOCUMENTS

Opening a Saved Document:

To open a saved .bqy document, you must be logged into Brio and then follow the next two (2) steps:

1. Find the .bqy document on your local network (or wherever you saved it).
2. Grab the document with your cursor and 'drag and drop' the document onto the Brio screen. It will open to the section you last saved it in.
 - If you saved the document *without the data*, click 'Process' on the toolbar to get the results.
 - If you saved the document *with the data*, the results are the same as you saved previously, it is not refreshed automatically. To refresh/update the results, click 'Process' on the toolbar.

Exporting Result or Pivot Sections:

There may be situations where you'll find that working with the data in another program accomplishes your needs better than working with it in Brio. You can export the results of a Query or Pivot Sections into an Excel spreadsheet, to Lotus, a tab- or comma-delimited file or to an HTML file.

To export Result or Pivot Sections:

- Click on either the Results or Pivot Section.
- From the 'File' on the toolbar, choose 'Export' and then choose 'Section.' The file type defaults to Excel but you can choose other file types from the drop-down list.
- Type in the name of your document and click 'Save.'



To capture faculty only, limit on the job class code field.

- Job class codes for University faculty are 007846, 007801, or 007830.
- Job class codes for College faculty are 007845 or 007018

BRIQ PIVOT SECTION

Add Totals:

You can add subtotals and totals of data to your pivot report.

- To add a grand total, click on the tab of the outer column, and from the Pivot Menu, choose 'Add Totals.'
- To add subtotals, click on the tab of the inner column, and from the Pivot Menu, choose 'Add Totals.'
- To remove subtotals or grand total, click on a subtotal to select it, then press <Delete>.

Change Data Labels:

To change the data labels, simply double-click on the Data Label and change the label to whatever you wish.

Add Corner Labels:

To add Corner Labels, right-click and choose Corner Labels, then choose None, Top, Side, or Both.

Data Functions:

Data functions compute aggregate values, including averages, maximums, counts and other statistics. These functions summarize groupings of data. You can use data functions to aggregate and compute data from the server before it reaches the Results section, or compute different statistics for aggregated Results totals and report items. Some of the data functions are:

- Sum - sums the values
- Average - computes the average of the values
- Minimum - the lowest of the values
- Maximum - the highest of the values
- Count - counts the numbers of the values
- Count Distinct - counts the number of distinct values



BRIQ PIVOT SECTION

One kind of report that you can produce is called a Pivot Table. This report is similar to a spreadsheet. You use this report when you want to create cross-tab reports and analyze data. Pivot Tables allow you to add, move, rename, focus on, and group dimensions to gain customized views of the data. You can use these tools to present data in different context and with heightened emphasis.

Pivot tables are made up of:

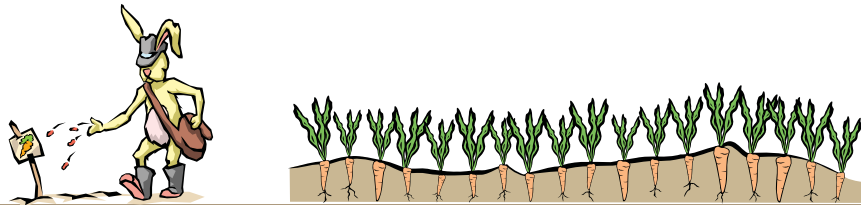
- Facts – Core numeric data that you slice and dice dimensionally in your analysis.
- Dimensions – Descriptive items that break aggregate data (facts) into logical categories. In the Pivot section, dimensions are either Top Labels or Side Labels.

To Create a Pivot Table:

- Choose 'Insert' on the toolbar, and then 'New Pivot.'
- If the Outliner is not visible, click Outliner on the Section title bar.
- Perform one of the following actions:
 - Drag each Request item to be included in the table from the Catalog pane to a pane in the Outliner (Top Labels, Side Labels, or Facts).
 - In the Catalog pane, select one or more Request items and choose Pivot, Add Select Items, Outliner Pane.

Outliner Pane:

The outliner pane has Side Labels, Top Labels, and Facts. The Side Label displays the data as a row label. The Top Label displays data as a column label. Numerical Items are placed in the Facts area of the outliner and are automatically totaled by the result of the top and side labels.



BRIQ QUERY SECTION

Query Section:

The query section lets you 'ask questions' of the Operational Database. To use Brio effectively, you need to formulate your business question, then build a query based on it. For example, you might want to know how many employees you have within each bargaining unit. This is the business question that determines how you will construct the query.

Constructing a query:

To construct a query, you need to specify criteria for the query:

- The types of data that you want to retrieve, for example, FY, Last Name, First Name, Bargaining Unit, Assn Type Code. Brio refers to these as 'items.' In order to create a query and produce results, you must specify one or more items.
- Criteria on which you want to measure available data for retrieval. For example, you may want to retrieve data for only one fiscal year or only certain assignment type codes. Brio refers to these criteria as 'limits.' Limits are optional when constructing a query.
- How to group data. For example, you may want to retrieve employee data by cost center or bargaining unit. Brio refers to this as a 'sort.' Sorting Results is optional when creating a query.

By default the Request Line is displayed. If you want to use the Limit Line or Sort Line you may have to turn on their display.

Request Line:

Specify the items you want to retrieve. The Request Line may contain pre-selected fields or may only have one or two fields. This depends on the purpose of the document. Some documents have pre-defined purposes and some are left very simple for users to define what data they want in their query. There are several ways to add fields to the Request Line:

- Select a field name in a table, then either drag and drop on the request line or right click, 'add selected items.'

BRIQ QUERY SECTION

- To select multiple items that are contiguous, click on the first item, then <shift>-click on the last item.
- To select non-contiguous, click on the first item, then <Ctrl>-click on each item.

Rearranging items in the Request Line.

You can also rearrange the order of items in the Request Line by clicking and dragging them to the new position.

Removing Items from the Request Line.

You can remove fields from the Request Line by dragging them off or highlighting the field and pressing the <Delete> button.

Removing ALL Items from the Request Line.

To remove ALL items from the Request Line, click once on the Request button to select it, then click <Delete>.

Limit Line:

Specify the criteria for retrieving the data. You can specify limits either by dragging the item by which you want to limit in the table to the Limit Line or by double-clicking on the item. If you choose to double-click on the item, a 'limit' box will appear, prompting you for choices. Click the 'Show Values' to display the values exactly the way it is in the database. Show Values provides a list of values actually in the database (or in the data set in Results) and allows you to choose a value based on the data available.

Sort Line:

Specify how you want to group the data. In most cases, you will want to group the items in a meaningful order to make it easier to review the data. For example, you may want to list the employees in alphabetical order by last name. To do this, you can drag the item on which you want to sort from the Request Line to the Sort Line. You can also sort more than one item, for instance, you can sort by bargaining unit and last name. The sequence of items goes from left to right in the Sort Line dictating the sorting order.

BRIQ RESULTS SECTION

To modify the Grouping Column, right-click on the gray bar of the column you wish to edit, and choose "Modify Column." This will allow you to view and edit the existing groups.

Break Total:

Use the Insert Break Total dialog box to apply a break total to a column. Break totals are typically used in reference to subtotals. Subtotals are generated by a break column. The break column contains the data by which you group (break) your total. A break column contains characters (as opposed to numbers). When you apply a break total, the total automatically sorts data by the break column and brings together the unique values.

- Right-click anywhere in the Results Section and choose 'Break Total'
- A pop-up box will appear that allows you to choose where to make 'At Every Break In' subtotal. You can choose an item from the drop-down menu, such as cost center or Emplid.
- Then determine the 'Break Total Function.' From the drop-down menu you can sum or count.
- Decide which column to apply the 'Add Break Total'. Click the 'Ok' button and the subtotal is automatically calculated.

Grand Total:

Use the Insert Grand Total dialog box to apply a grand total to a column. A grand total on a numeric column applies a default "sum" function. However, each column can have a number of grand totals, each with a different aggregate function (such as minimum, maximum, average, and so on) applied to it.

- Right-click anywhere in the Results Section and choose 'Grand Total'
- A pop-up box will appear that allows you to choose where to make 'Grand Total Function.' You can choose an item from the drop-down menu, such as sum, average, minimum, or maximum.
- Then click the 'Ok' button and the grand total is automatically calculated.

BRIQ RESULTS SECTION

the desired results. It also provides some tools to assist with the equation.

- The Definition Box is where you enter the equation. You can either type in the equation or use the buttons (below the Definition Box) to build the equation by pointing and clicking.
- These two rows of buttons are called 'hotstamp buttons' and can be used for adding mathematical operators, such as multiplication or division.
- Use the Functions button to go to another pop-up box that lets you choose from a number of pre-made functions, such as date or statistical, that you click on to automatically enter the functions into the box.
- Use the Reference button to get a list of the items in your query. Click on any of the items to have them automatically inserted into the box.
- Once you have completed your computation, you can click 'Ok' and a new column appears as the *last* column. You can then move to the desired location.

Add Grouping Column:

You might want to group like items together and display them as a group, such as unlimited full-time and full-time probationary into one group called 'full-time.' To do this, you can use the 'Add Grouping Column' command under the Results Menu or by right-clicking on your mouse.

- A pop-up box will appear where you can create a 'new' group. Click on the 'new group' button and assign a name for your grouping. Repeat this process to create more than one grouping.
- Highlight the items from the 'Available Values' list and using the 'left arrow' button, place items into each grouping.
- Click 'Ok' and a new column appears as the *last* column. You can then move to the desired location.



BRIQ QUERY SECTION

Processing the Query:

Now that you have specified all the requirements, you are ready to process the query and see the results on your screen.

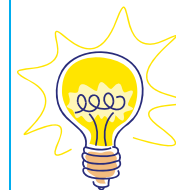
You can process a query two ways:

- Use the Process Current command under the Tools menu,
- Use the Process button on the Toolbar.
- Since multiple queries can exist in a 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.

If need be, you can *cancel a query* while it is in progress. To do this, press <Alt>-<End>.

Once you process the query, the results are sent from the database to your computer and displayed on the screen in the Results Section.

Remember, you can always return to the Query Section and redo a query if needed. If you add items, change the limit or sort line, you will also need to process the query again to get the new results.



Use the 'Count Distinct' function to avoid creating multiple lines of data for one employee.

- Add an additional unique identifier such as SEMA4 ID or Tech ID to the request line in the Query Section.
- Highlight the field, right-click on your mouse and choose 'Data Functions' and then 'Count Distinct.'

BRIQ RESULTS SECTION

Working with the Results:

The Results Section contains the columns and rows of data requested in the query section. Once you've processed your query and the results are displayed, there is a lot you can do:

- Reorganize the data to view it from different perspectives, such as move the columns around, compute them, or group them.
- Format the data to make it easier to read, e.g. change the font size.
- Export the data to Excel.

Limit:

To further limit the data in the Results Section, double click the gray bar at the top of the selected column or in the data area. The 'Limit' box will appear. To show the available values, click on 'Show Values' button on the left-hand side and select from the list. Click 'OK' on the right-hand side and the limits will be immediately applied.

Sort:

You can sort any column you choose in ascending or descending order. *When you sort, the entire row stays together.* To sort, right-click on the gray bar at the top of the column to be sorted, select which sort you want [ascending (A-Z) or descending (Z-A)]. The sort works on multiple columns and works independently on each column.

Resize Column Widths:

In the Results Section, all of the columns are the same width. You can read-just the width of the column to make it easier to read rows of data. You can use either of these two techniques:

- Place the mouse pointer on the right column divider (the cursor looks like this <-->) and drag the divider a small amount to the right until the header fits correctly.
- Place the mouse pointer on the right column border and double-click or press <Ctrl>-E.



BRIQ RESULTS SECTION

Wrap Text in a Column:

If widening the column makes it harder to view the results, you can make the text fit into a narrower column by using the 'text wrap' feature. You can do this by:

- Clicking on the column you wish to make smaller, drag the right border to the left,
- Highlight the column and choose 'Text Wrap' from the Format Menu or by right-clicking on your mouse .

Move Columns:

You can change the order of the columns in your results simply by clicking and dragging the column to a new location.

Hide/Unhide Columns:

To hide columns, click on the column you wish to hide (on the gray bar at the top of the column), right-click, and click on 'Hide Column.'

To unhide columns, right-click on any column, click on 'Unhide Column.' This will bring up a list of all hidden columns. Select the column you wish to unhide. The unhidden column will then appear as the *last* column. You can then move to the desired location.

Format Numbers:

To change the way the numbers are displayed, select the column where the numbers reside, right-click and choose the 'Number' option. Several number options are available, such as date, currency, and accounting. Choose the format you prefer. The format will only change in the columns you have highlighted. You can choose multiple columns by holding the <Ctrl> key down and clicking on multiple columns.

Add Computed Item:

Sometimes you may want to add a column that is calculated from columns in the Results Section. To do this, you can use the 'Add Computed Item' command under the Results Menu or by right-clicking on your mouse.

- A pop-up box will appear where you can write your formula. The Definition box allows you to assign a name to the new column and create an equation that produces