Exercise 1

Step 1: Create query
Open the Finance model
Go to Current Year Operating Ledger window and open the Current Year Operating Ledger object
Select Index and sort on it
Select Curr Per Ytd Dr and sort on it
Qualify DC = D
Switch to Index object
Select Termination Date
Qualify Org begins with 23202
Switch to Fund object
Qualify Grant Code IS NULL
Run Query – get 59 rows
Send to BI Reports
Create columnar report (no totals)
Change format of Amount column to show 2 decimal places
Hide the Index footer band

Step 2: Create a Grand Total
Select an amount in the Amount column
Tools
Calc-O-Matic
Sum on the Entire Column

Step 3: Create a Calculation in a new column
Select the Table
Tools
Calculations
New
Switch to Description tab
Name: Percent of Total
Switch to Expression tab
Insert the column SUM Curr Per YTD Dr
Insert a Divide operator (/)
Insert column Sum (SUM Curr Per YTD Dr)
Click Check
Click OK
Change the format of the new column to 2 decimal places, and percentage

Step 4: Create an Exception to Highlight Terminated Indexes
Tools
Exceptions
New
Switch to Description tab
Change the name to Flag Terminated Descriptions
Create Expression:
'FINANCE.INDX.TERMINATION_DATE'=<NULL>
Change the style of the False setting to use a red font
Click the Check button
Click OK

Step 5: Apply the Exception to Index and Amount columns
Select the column(s) you want to apply the exception to
Format, Properties, General, select the exception from the drop down list.
Notice that the exception formatting now controls the displayed number and alignment. Go back to the exception and change the style of both True and False settings to Right align, 2 decimal places.

**Tips**

When you are composing an expression and you think you are done but the OK button does nothing, your expression has an error. To learn about it, click the Check button and look at the tip that appears in the lower left.

Don't type column names. You'll make fewer errors and it's faster if you insert them.

Operators and functions are very fussy about data types (numbers, character strings, dates, and results of comparisons) they will process.

When composing complicated expressions, take smaller pieces of the large expression and use the check button on them independently in order to isolate problems.

For reports with several calculations, it is wise to clearly name all calculations, even those created by Calc-O-Matic. Immediately after creating a new Calc-O-Matic calculation, right-click on one of the new results fields, select Calculations…, modify the default name (Calcx) to fit your naming scheme and fill the description with helpful information.

To combine two character strings into one column separated by a /, the expression is:
'Table.Attribute1' + '/' + 'Table.Attribute2'

To combine a character string and a number separated by a space, the expression is:
'Table.CharacterAttribute' + ' ' + Str('Table.NumberAttribute')

To calculate the number of years between a date and today, the expression is:
(Today() – 'Table.DateAttribute')/365

**Exercise 2**

As a group, select 4 or 5 attributes that you use a lot. It would be good to include at least one $ column and one date column. Sort on one or more columns. Qualify your query so that you only get a page or two of rows when you run it. Send the results set to BI Reports. Work together to come up with and apply at least one example each of Calc-O-Matic, Calculations, and Exceptions to enhance your data.

**Exercise 3**

As a group, brainstorm ways to use BI Reports to enhance your reporting.

**Homework**

Pick at least one of the ideas generated during the brainstorming session to develop and bring it to May's meeting to share with the group.