Data Warehouse Query Development Process

1. What type of report am I trying to create?

2. What window should I start in?

3. What object contains the primary data I need?

4. What data do I want to see appear on the report?

5. Do I need to get any data from other objects in this window?

6. How do I want to limit data? (I don’t want to get back all data for the entire University, after all.)

7. What order should the rows of data be sorted in?

8. What order should the columns of data appear in? (Usually the column order should follow the sort order.)

9. Are there any other features that we want to use, like SUM, or DISTINCT? (In general, any time you are working with summarized data for $, you want to choose SUM from the Function column for each attribute that represents $$. Distinct doesn’t usually apply when working with $ amounts.)
Report Design and Format considerations

General Notes
Before you can format a report, you need to run the query and get a results set back with raw data.

Review the results set to see if the data looks like what you expect to see. If not, go back and tweak the query until you are satisfied.

Once the results look right, go to the Results menu and choose Show As Report, and select BI/Query Standard.

Almost every command you will need to format the report is found under the Report menu.

Common first steps:

1. Adjust the column widths
   It works best to start at the right and work back towards the left.
   You can’t manually adjust the width of the margin on the page.

2. Reorder columns
   The columns that were sorted on will be first. If you are going to subtotal, it is important to keep the sorted columns in the same order from left to right. Moving titles next to their associated codes is safe.

3. Suppress duplicates
   This works from left to right only as far as the first column where each line is unique. If columns farther to the right have duplicates, they will not be suppressed.

4. Edit the column headings
   You can only edit the text and change the alignment of one column at a time.
   You can change the format of all columns at once by clicking in the page margin next to the column headings and then selecting Text Style from the Reports menu.
   When editing the text, I recommend you not use the Enter key to force the title onto multiple lines. It causes other formatting later to operate strangely.

5. Edit the report title
   Especially if you are including prompts in the report title, I recommend you not use the Enter key to force the title onto multiple lines. It can cause the report to crash under certain circumstances later.

6. Add borders to the report
   Once you find that you format all your reports in the same way, you can set those borders as a default that will automatically apply to all new reports, and then you can override that formatting as needed on individual reports later. You set the default under Tools, Preferences, Report Borders.