Tutorial 2; Get Balance
Data Warehouse Services
Create a report of Student Account Balances by Campus for those students that are currently active in a program. For those students that are pursuing multiple degrees, associate their balance with the first Campus in alphabetical order.

**Step 1 Obtain Personal information limited by emplid**

**Step 1.1: Rename Sections.**
Step 1.2: Add the table CC PERSONAL DIM.

Step 1.3: Add Pers_Emplid, Pers_Primary Last Name and Pers Primary First Name fields to the request line.

Step 1.4: Set the limit on Pers Emplid = 1454577.
Step 1.5: Process the query to get results.
Step 2 Obtain list of students by term (with campus information) who are eligible to enroll

Step 2.1: Add the REC ACAD STRUCTURE DIM table.

Step 2.2: Add Struc Campus Ldesc and Struc Acad Career to the request line.

Step 2.3: Set Limit on Struc Acad Prog Status Ldesc = “Active in Program”.

Step 2.4: Drag from CC PERSONAL DIM to REC ACAD STRUCTURE DIM to join the two tables on Emplid.
Step 2.5: Process the query to get the results.
Step 3 Obtain Gross Balance information

Step 3.1: Add the table UC CC PERSONAL DIM.

Step 3.2: Add Uc Pers Netid to the request line.

Step 3.3: Drag from CC PERSONAL DIM to UC CC PERSONAL DIM to join the two tables on Emplid.
Step 3.4: Add the table UC SF ACCOUNT SUMMARY FACT.

Step 3.5: Add Uc Acctsum Total Balance Amt to the request line.

Step 3.6: Drag from CC PERSONAL DIM to UC SF ACCOUNT SUMMARY FACT to join the two tables on Emplid.
Step 3.7: Drag Pers Emplid and Struc Campus Ldesc from the Request line to the Sort line.

Step 3.8: Set limit on Uc Pers Netid as not null. Check Uc Personal Netid not is null. (You do not need to enter a Netid).
Step 3.9: Process the query to get the results.
Step 3.10: Right click on the left hand corner of the grid to add a Computed Item.
Step 3.11: Click if, click else and place the insertion point in between the parenthesis ( ).

Step 3.13: Complete the Definition as follows

```
if (Prior ( Pers_Emplid ) == Pers_Emplid) {1}  else {0}
```
Step 3.14: Insert a new table and rename it T Get Balance.

Step 3.15: Drag the following fields to the Outliner; Pers Emplid, Pers Primary Last Name, Pers Primary First Name, Struc Campus Ldesc, Uc Pers Netid, Uc Acctsum Total Balance Amt.

Step 3.16: Drag Occurrence to the Limit Line and set it = 0.
Step 4 Add Variable Limit

Step 4.1: Remove Pers Emplid from the Limit line and add Struc Campus Ldesc.

Step 4.2: Right click on Struc Campus Ldesc and select Variable Limit.
Step 4.3: Process the query to get the results by limiting Struc Campus Ldesc = “Avery Point”.
Step 4.4: Rename the portrait report to Get Balance.
Step 4.5: Expand the Q Get Balance and T Get Balance fields.

Step 4.6: Drag Struc Campus Ldesc field to Report Group 1.
Step 4.7: Drag Pers Primary Last Name, Pers Primary First Name, and Uc Pers Netid to Table Dimensions.

Step 4.8: Drag Uc Acctsum Total Balance Amt to Table Facts.

Step 4.9: Rename Scheduling Office Text to Bursar’s Office.

Step 4.10: Rename Header Row 2 Here text to Student Balance Information.

Tip – If you click off of a Report section and then back on, Brio will expand Result section elements and collapse Table section elements.

Tip – If you cannot add elements to the Table outliner, remove the Table from the report body and reinsert by right clicking and selecting Insert Table.