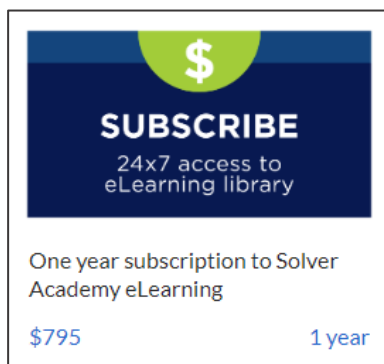


# Solver Certified Associate Report Design Level 1



## Preparation Guide

Welcome to the *Solver Certified Associate* program. By following the track listed below and passing the two-part exam, you will be awarded a digital badge through BadgeCert.com that signifies your certification in *Report Design Level 1*, in either BI360 version 4, BI360 Cloud, or Private Host 5x.



**NOTE:** Please note, all courseware is available within the Solver Academy. To purchase a one-year subscription, contact your partner or go to <https://academy.solvertraining.com>



**TIP:** A progress tracker is included later in this document, allowing you to add per lesson notes, either for yourself or for submission to Solver Training.

### Report Design Foundation

This course includes a variety of report design lessons, grouped together by topic. At the end of each topic there is a quiz, allowing you to evaluate your knowledge. See *Report Design Foundation Curriculum*, later in this document, for detailed information on each lesson. Students spend approximately 2-3 hours in this course. This course can be completed first, to understand the theory of report design with BI360, or it can be completed after your self-study. You can also work on these courses concurrently.

### Self-Study – Report Design Essentials I

This series of hands-on modules allow you to practice your report template building skills with a focus on Trial Balance and Profit & Loss reports. If you already have report template building skills, you may wish to simply review each design and its key concepts.



**NOTE:** While not identical in design, the hands-on exercises cover similar concepts to those introduced in the *Report Design Foundation: Demo Report Templates* lessons.

For students who wish to maximize their learning, these hands-on lessons offer valuable, step-by-step guidance into template building. Students spend approximately 4-6 hours in this course.

## Report Design Level 1 Final Assessment

There are two components to your certification assessment, each requiring a passing grade:

- Multiple choice/multiple answer exam – 50 questions
  - A passing grade is 73%
- Hands-on report template design
  - A passing grade is 73%

Both aspects of the final assessment are completed within the Solver Academy, however, you'll need access to a predefined testing environment for the hands-on template design.



**NOTE:** Please contact [training@solverglobal.com](mailto:training@solverglobal.com) to request a testing login. Once assigned, you'll have 24 hours to complete, download, and submit your templates to the same address.



**IMPORTANT:** You have three attempts to pass your assessments, with a ten-day waiting period between attempts.

## Report Design Foundation Curriculum

- **Template Navigation Basics ~ 20 minutes + quiz**
  - **Excel Add-in Overview** – Introduces the BI360 Reporting ribbon, Report Designer pane, and the Layout Editor. Includes an initial overview of the Layout Editor functionality for filtering, grouping/sorting, and period aggregations, along with expanding/non-expanding groups and sheet filters. Automated column headers are also introduced.
  - **Create New Template** – Describes the product functionality that allows you to log into a database and create a new blank template. Specifics for version 4 and 5 are included.
  - **Report Designer User Interface** – Explores the options settings in both Design and Run modes of the Report Designer pane. Also provides an introduction to template design elements: Modules, Dimensions, Dimension Attributes, and Measures.
  - **BI360 Reporting Ribbon** – Explores the features and default options found within the BI360 ribbon groups. Selection group options, working with native Excel sheet protection, open sheet options, auto-sign in, report query timeout interval, and language settings are all covered.
  - **Download:** Field Mapping
  - **Quiz:** Template Navigation
- **Working with Rows ~ 12 minutes + quiz**
  - **Introduction to Accounts & Filters** – See how accounts and filters are applied to rows. Topics include:
    - Define account grouping for rows such as Assets, Revenue, and Operating Expenses.
    - Use ranges, individual accounts, and apply filters using In and Begins with.

- Add the Account Description attribute to the rows and apply ascending or descending sorts.
    - Define the relationship between the Account dimension and its related attributes.
  - **Multiple Dimensions** – Learn how multiple dimensions can be added to rows. Topics include:
    - Combine two dimensions on the rows of a single template, such as a combination of accounts and departments to present operating expenses by department.
    - Combine multiple filters of accounts using the Or, And, And Not, and Or Not operators.
  - **Quiz: Working with Rows**
  
- **Working with Columns ~ 9 minutes + quiz**
  - **Time-based Columns** – Explore how time is used in columns to create groups and labels. Topics include:
    - Examples of using the period functions such as YTD, This Year (all), and Previous Period, and how these functions related to the Period report parameter.
    - Introduce Periods End attributes for date-based column headers in expanding and non-expanding columns.
  - **Dimensions in Columns** – Learn how dimension filters and expanding columns are configure in templates to create various reports such as departments side-by-side and actual vs. budget. Topics include:
    - Display departments side-by-side on a report using an expanding column group, where the column is filtered on a specific range of departments.
    - Explore the use of scenario-based filters that are added to column groups to create separate Actual and Budget columns.
    - Use native Excel functionality or the OneStop Reporting feature to sum columns.
  - **Quiz: Column Concepts**
  
- **Working with Sheet Filters & Parameters ~ 16 minutes + quiz**
  - **Sheet Filters & Parameters** – This lesson includes the following topics:
    - Introduces Filter functionality specific to sheets which can also be applied to rows, columns, and cells.
    - Defines the order of precedence when filters exist in all four areas (remember alphabetical: cell, column, row, sheet, with cell being the overall winner)
    - Review of Auto Parameters and using the Parameter Wizard to define/modify existing parameters.
    - Using parameters as labels to automatically update a report header to the parameter selection.
  - **Parameter Wizard** – Topics in this lesson include:

- Explore the features available when using parameters.
- Define lookups, text boxes, drop-down lists, check list, and tree selections used for run-time prompts.
- Limit run-time selections and specify default values.
- Hide parameters from users.
- When to allow empty and multi-selection parameters.
- Introduction to “sheet per value” parameters.
- Using the Report Parameter module to define report headers.
- **Summary Worksheet Parameter** – Topics in this lesson include:
  - How to create a copy of a template worksheet for summary results, when the primary worksheet is a “sheet per value” design.
  
- **Working with Dates ~14 minutes + quiz**
  - **Date Display** – This pdf document covers the following topics:
    - How Period, Period Start, and Period End display and differ in reports.
    - Using Format Cells in Excel to customize the display of Period Start or Period End.
    - Combining custom text with a Period-based attribute, such as Period End
  - **Period and Date Calculation Functions** – This Solver white paper provides details into using custom Period Calc functions in report templates.
  
- **Demo Report Templates ~ 60 minutes**
  - The following lessons provide a collection of basic Trial Balance and Profit & Loss report templates that are deconstructed, allowing you to review the design details. For the hands-on experience, please continue to *Self-Study - Report Design Essentials I*.
    - **Trial Balance Monthly Delta**
    - **Consolidating Trial Balance**
    - **Profit & Loss - Actual vs Budget**
    - **Profit & Loss - Actual vs Budget, Departmental Expense**
    - **Profit & Loss - Actual vs Budget, Departmental “sheet per value”**
    - **Profit & Loss - Actual vs Budget, Departmental per sheet + Summary**
    - **Side-by-side Departmental Expenses**

### Report Design Level 1 Progress Tracker

Title	Completed	Comments (additional room on the last page)
<b>Template Navigation Basics</b>		
Excel Add-in Overview		
Create New Template		
Report Designer User Interface		
BI360 Reporting Ribbon		
Quiz		
<b>Working with Rows</b>		
Introduction to Accounts & Filters		
Multiple Dimensions		
Quiz		
<b>Working with Columns</b>		
Time-based Columns		
Dimensions in Columns		
Quiz		
<b>Working with Sheet Filters &amp; Parameters</b>		
Sheet Filters & Parameters		
Parameter Wizard		
Summary Worksheet Parameter		
Quiz		
<b>Working with Dates</b>		
Date Display		
Period Calculation Functions		
Quiz		

Title	Completed	Comments
<b>Demo Report Templates</b>		
Trial Balance Monthly Delta		
Consolidating Trial Balance		
Profit & Loss Actual vs Budget (AvB)		
Profit & Loss AvB Dept Expense		
Profit & Loss AvB Dept sheet per value		
Profit & Loss AvB Dept per sheet + Summary		
Side-by-side Dept Expenses		
<b>Self-Study Report Design Essentials I</b>		
Creating a New Template in BI360 Cloud/version 5		
1 – Build a Trial Balance		
2 – Full-year Trend Trial Balance		
3 – Trial Balance with Variance		
4 – Detailed Profit & Loss with Variance		
5 – Departmental Profit & Loss		
6 – Department & Summary Profit & Loss		
7 – Side-by-side Departmental Profit & Loss		
8 – Full-year Actual & Budget Trend Profit & Loss		
9 – Troubleshooting Report Templates		
10 – Intersecting Period Functions		
Final Exam		
Hands-on Template Design		

Additional comments: