

Brio 101 Course Description

Course Instructor: Keith Cushing

This course is required for Track 1 and Track 2 users.

Prerequisite: Basic familiarity with MS Windows and Internet Explorer.

Brio 101 is an extensive, hands-on course that provides Data Warehouse users with the skills necessary to work with Brio Insight, the front-end tool for the Data Warehouse. In this class, participants will learn how to use Brio Portal and Brio Insight to build queries, create reports, and analyze data.

Brio 101 is an 8-hour course, offered in two consecutive half-day sessions:

Day 1 Agenda

- Training Program Overview
- Data Warehouse and Business Intelligence Basics
- The Brio Environment at Rensselaer
- Brio Portal Demonstration
 - User Exercise: Portal Navigation and Password Change
- Star Schemas
- The Brio Insight Interface
- Basic Query Building
 - Class completes Lab 1
- Query Building Process
- Query Building with Data Functions
 - Class completes Lab 2
- Table Reports
 - Class completes Lab 3

Day 2 Agenda

- Day 1 Review
- Brio Portal
 - Subscribing to Documents
 - Adding Bookmarks
- Brio Meta Topics
- Pivot Reports
 - Class completes Lab 4
 - Class completes Lab 5
- Pivot Analysis
 - Class completes Lab 5b
- Charts
 - Class completes Lab 6
- Next Steps

Lab Exercise Descriptions

Lab 1: Query Building

- Using a Star Schema to Build a Request line
- Setting Limits
 - Using Show Values
 - Entering Custom Values
 - Creating Variable Limits
 - Customizing Limits
 - Using Operators: AND, OR, ()
 - Placing multiple limits on one item
- Sorting a Query
 - The Sort Line
 - Sort Order
- Processing a Query
- Formatting a Results Section
 - Number formats
 - Fonts
 - Sizing columns
- Saving a Document
 - Save Options
 - Exporting

Lab 2: Query Building with Data Functions

- Using a Star Schema to Build a Request line
- Setting Limits
 - Using Show Values
 - Entering Custom Values
 - Creating Variable Limits
 - Customizing Limits
- Sorting a Query
 - The Sort Line
 - Sort Order
- Aggregating a Query with Data Functions
 - Applying multiple Data Functions (Sum, Avg., Count, Min., Max.)
- Estimating the number of rows returned by a query
- Processing a Query
- Formatting a Results Section
 - Number formats
 - Fonts
 - Sizing columns

Lab 3: Table Reports

- Opening a Saved Document
- Inserting new Tables
- Using the Outliner
- Setting Local Limits
- Calculating Totals and Break Totals
 - Using Sum and Average Data Functions
 - Adding labels to Totals
 - Deleting Break Totals
- Formatting
 - Auto-sizing columns
 - Changing column widths
 - Number formats
 - Suppressing Duplicates
 - Formatting the border and background
- Print Preview
 - Working with Headers and Footers
 - Adjusting Page Margins

Lab 4: Pivot Reports

- Using a Meta Topic to build a Request Line
- Inserting a new Pivot
- Using the Outliner
- Applying Data Functions
 - % Category
 - % Increase
- Grouping
 - Grouping labels
- Spotighting exceptional values
- Focusing on data
- Hiding data
- Formatting
 - Renaming labels
 - Justifying text
 - Changing column widths
 - Number formats
 - Repositioning Data Labels
 - Applying text
 - Modifying borders
- Converting a Pivot to a Chart

Lab 5: Pivot Reports and Analysis

- Opening a published BQY Document
- Inserting a new Pivot
- Using the Outliner
- Adding a Cume Column
- Applying Data Functions
- Surface Values and Underlying Values
- Drilling Down
 - Drill Anywhere
 - Using pre-defined drill paths
 - Drill to Detail
- Formatting
 - Renaming labels
 - Resizing columns
 - Number formats
 - Duplicating Sections
 - Renaming Sections

Lab 6: Charts

- Opening a published BQY Document
- Inserting a new Chart
- Using the Outliner
- Creating a Computed Item
- Creating a Cluster Bar Chart
- Creating a Pie Chart
- Creating a Bar/Line Chart
- Creating a Cume Bar/Line Chart
- Converting a Chart to a Pivot
- Formatting Charts
 - Chart Properties
 - Display chart values and percentages
 - Pie slice positioning
 - Rotating charts
 - Adding color
 - Renaming chart titles
 - Renaming chart sections
 - Hiding Items
- Scaling Charts
- Sorting in Charts
- Focusing on Chart data