

Track 1, Level 1 Course Description

Course Instructor: Keith Cushing

Prerequisite: Brio 101

This hands-on course provides Portfolio Financial Managers (and others who have ad-hoc query and reporting needs) with the skills necessary to extract and analyze data from a data mart. In this class, participants will use Brio Insight to build queries, create reports, and analyze data from a production data mart.

Track 1, Level 1 is taught in one half-day session:

Course Agenda

- Brio 101 Review
 - Brio Products
 - Meta Topics
- Data Mart: Star Schemas
- Brio Essentials
- Data Mart Demo
 - Fact and Dimension Table Overview
 - Dashboards
 - User Perspective
 - Query Perspective
 - Published Brio Documents
 - Database Password Change
- Hands-on Exercises
- Next Steps
- Contact Information

Lab Exercise Descriptions

Exercise 1: Annual Budget Amount

Published BQY: OLM and OLT Meta Topics

Section: Q-OL Monthly Summary

Objective: Show the annual budget for FY 2002 and FY 2003 by Portfolio, Department, and Organization.

Exercise 2: YTD Expenditures

Published BQY: OLM Star

Objective: Show expenditures by Portfolio, Account Line Category, and Fiscal Period for FY 2003.

Exercise 3: Fund Home Portfolio and Fund Manager

Published BQY: OLM and OLT Meta Topics

Section: Q-OL Monthly Summary

Objective: Show the number of funds owned by the Fund Managers of the user's home portfolio.

Exercise 4: Fund Expenditures

Published BQY: OLM and OLT Meta Topics

Section: Q-OL Monthly Summary

Objective: Show fund expenses by organization.

Exercise 5: Revenue and Expenditures for this Fiscal Year

Published BQY: OLM and OLT Meta Topics

Section: Q-OL Monthly Summary

Objective: Show the facts distributed under the Revenue/Expenditure Indicator. Create a computed item that places all revenue and expenditures in a single column of a Pivot Table. Display correct totals in a Revenue minus Expenditures Pivot Table.

Exercise 6: Transactions – Monthly Summary and Daily Details

Published BQY: OLM and OLT Meta Topics

Sections: Q-OL Monthly Summary and Q-Actual Transactions

Objective: Display detail transactions in the Q-Actual Transactions section, then, show the same transactions summarized monthly in the Q-PL Monthly Summary section. The grand totals for all facts should match across the two sections.