

Track 1, Level 2 Course Description

Course Instructor: Keith Cushing

Prerequisite: Brio 101 and Track 1/Level 1

This hands-on course provides advanced users with the opportunity to work through complex exercises that include If-Then-Else statements in computed items, adding grouping columns to results sections, and creating basic Brio reports. In addition, time will be allotted for users to ask questions on Brio documents that they have created and/or to share Brio/data mart tips with the group.

Track 1, Level 2 is taught in one half-day session:

Course Agenda

- Level 1 Review
- Hands-on Exercises
- Questions and Answers on User-Created Brio Documents

Lab Exercise Descriptions

Exercise 1: Fund Classification, Category, and Subcategory

Published BQY: OLM and OLT Meta Topics

Section: Q-OL Monthly Summary

Objective: Show the fund hierarchy as it appears in the Fund Dimension

Exercise 2: Credit Card Reconciliation

Published BQY: OLM and OLT Meta Topics

Section: Q-Actual Transactions

Objective: Show detailed credit card transactions by cardholder. Create a fiscal quarter grouping column in the Results section and use it in a new Pivot table.

Exercise 3: Intro to Brio Reports

Use Lab2.bqy, created in the last exercise.

Objective: Insert a new Report section that displays summary and detailed information for credit card transactions.

Exercise 4: Monthly Graphs

Published BQY: Monthly Graphs

Objective: Insert a new Table with a Computed Item that highlights exceptional values in the Combined Results section.

Exercise 5: Budget

Published BQY: OLM and OLT Meta Topics

Section: Q-OL Monthly Summary

Objective: Perform a budget analysis by fiscal year. Use a computed item to combine the Annual Budget Amount with the Project YTD Budget Amount.