

Track 2, Level 1 Course Description

Portfolio/Department-Specific Data Mart Training for Track 2 Participants

Course Instructor: Keith Cushing (with assistance from the Portfolio Financial Manager)

Prerequisite: Brio 101

This hands-on course prepares Department Financial Managers (and other department-level users) within a portfolio to extract and analyze data from pre-built Brio documents. The course includes a blend of Institute-wide and department-specific exercises with production data. The Portfolio Financial Manager will contribute to course content development and will be present at the session. Track 2, Level 1 training will be offered to all Track 2 users from a Portfolio as a group, multiple sessions may be needed to accommodate large groups and/or scheduling conflicts.

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

Course Agenda

- Brio 101 Review
 - Brio Products
 - Meta Topics
- Finance Data Mart: Star Schemas
- Brio Essentials
- Dashboards
 - User Perspective
 - Underlying Queries
- Published Brio Documents
- Database Password Change
- Hands-on Exercises
- Next Steps

Lab Exercise Descriptions

Exercise 1: Credit Card Reconciliation

Published BQY: Credit Card Reconciliation

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 2: 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 3: 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.

Exercise 4: 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. This exercise involves building a query with a Meta Topic instead of processing a pre-built Brio document.