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.