

2019

Birst University Education Syllabus



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Welcome to BirstU

Birst offers a variety of training options through our education department, BirstU. Whether you choose our public classroom-based Instructor-Led Training (ILT), private onsite ILT, or On-Demand eLearning, Birst training is an important part of ensuring a successful implementation. Live and Virtual ILT trainings provide a short-term student training account, while eLearning trainings require an account in the student's corporate Birst environment. Please select the training option that best accommodates your needs and resources. We recommend that at least two individuals go through the 4-day Birst Foundational Training.

Training Delivery is offered in three formats:



- Public Instructor Led Training (In person and virtual)



- Private Instructor Led Training (Onsite in person and virtual)



- On-demand, Self-paced eLearning (via Infor Campus)

Attendance Policy

Students must attend class for its full duration in order to receive credit for the course(s). Ensure that your personal and work schedules do not conflict with the scheduled class times.

Important: Birst exercises build on each other. Stepping out in the middle of a training means you will be unable to continue with the exercises that day. Instructors are only able to update your training account to the current state at the end of each training day so that you may continue at the start of the following day. This can only be done upon request, and only at the instructor's discretion, dependent on class size and progress. Please be respectful of the instructor and your fellow attendees' time by honoring this policy.

There will be no refunds for missed training. If a student is absent from any portion of class, he/she can contact education@birst.com to discuss the possibility of make-up time/work. This is not guaranteed and will be at the sole discretion of the Birst Education.

Cancellation Policy

Written notification of cancellation is required. Our cancellation/re-schedule policy is strictly enforced; failure to follow this policy will result in the deduction of classes from your training package and there will be no refund. Students do have the option to send a substitute student to the scheduled class in their place.

Birst reserves the right to cancel classes due to insufficient enrollment and Birst will apply funds for classes it cancels to a future class.

No expressed or implied agreements or guarantees are valid – only written, signed, agreements approved by all parties will be considered.

Enrollment

To enroll in any training, students must first establish an account with Infor Campus. Requests to add users to Campus must be submitted via a Customer Success Manager or other Birst liason, or by following the instructions found on the [Campus login portal](#).

2019 Instructor Led Training Education Schedule

Public Onsite Instructor Led Training

Date	Course Name	Location	Campus Course Number
January 14-15 January 16-17	Administrator Analyst	San Francisco, CA	00022314 00022392
February 11-12 February 13-14	Administrator Analyst	Alpharetta, GA	00022325 00022403
April 23-24 April 25-26	Administrator Analyst	London, UK	00022330 00022404
May 13-14 May 15-16	Administrator Analyst	San Francisco, CA	00022326 00022405
May 20-21 May 22-23	Administrator Analyst	St. Paul, MN	00022327 00022406
July 22-23 July 24-25	Administrator Analyst	London, UK	00022331 00022407
August 12-13 August 14-15	Administrator Analyst	Alpharetta, GA	00022328 00022408
September 9-10 September 11-12	Administrator Analyst	San Francisco, CA	00022329 00022409
October 28-29 October 30-31	Administrator Analyst	London, UK	00022332 00022410
November 11-12 November 13-14	Administrator Analyst	San Francisco, CA	00022324 00022411

Public Virtual Americas Training

Date	Course Name	Campus Course Number
January 22-23 January 29-30	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022455 00022512
February 19	Advanced topics	00022661
March 19-20 March 26-27	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022456 00022525
April 16	Advanced topics	00022665
May 21-22 May 28-29	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022457 00022526
June 25	Advanced Topics	00022666
July 16-17 July 30-31	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022458 00022527
September 17-18 September 24-25	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022459 00022528
October 15-16 October 22-23	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022460 00022529
November 19-20 November 26-27	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022435 00022530

Public Virtual EMEA Training

Date	Topic	Campus Course Number
May 7	Advanced Topics	00022667
August 27-29	Advanced Topics	00022669

Public Virtual APAC Training

Date	Course Name	Campus Course Number
February 27-28	Birst Foundations Administrator Training	00022461
March 6-7	Birst Foundations Analyst Training	00022558
April 10	Advanced Topics	00022672
June 12-13	Birst Foundations Administrator Training	00022462
June 19-20	Birst Foundations Analyst Training	00022559
August 7	Advanced Topics	00022670
October 30-31	Birst Foundations Administrator Training	00022463
November 6-7	Birst Foundations Analyst Training	00022560

Overview and Assumptions

The purpose of Birst Training is to facilitate the professional development of those who use the Birst platform, and promote their enablement.

The Education Department begins with these key assumptions:

- **Enablement is an iterative and cumulative process** which involves a combination of formal instruction/sharing, self-study, observation, and practical application (i.e. experience). While “familiarity” with Birst can be obtained quickly and easily, “mastery” takes time and necessarily involves hands-on experience. Differences in background, education, learning styles, and focus will affect the amount of time required to develop the appropriate levels of competency with Birst.
- **Competency objectives vary by Role.** Capabilities required to be successful will vary by role. For example the person responsible for Data Modeling in Birst will need to be more proficient in certain functionalities where the person responsible for creating dashboards may not need these same proficiencies. While all Birst users should have some degree of familiarity with the main components of the platform, the specialized knowledge required to be successful is not the same for all.

Competency Levels

We think of Birst users (Customers, Partners and even Employees) as falling into three levels in terms of proficiency in Birst. The descriptions below provide context for each level.

Level 1 – New. Has seen some demos, done some basic reading and participated in high-level discussions, but has little-to-no practical experience or depth of knowledge in Birst. Understands Birst from an end-user perspective and needs direction to perform most tasks. We assume most people who attend our classes are Level 1.

Level 2 – Learning. Has had some degree of experience with Birst and has engaged in some form of formal learning (e.g. instructor-led training, on-line documentation, mentoring, etc.). Understands basic concepts and can follow instructions to perform simple to moderate tasks. Someone at Level 2 asks for lots of help, not only because it is needed to complete the task, but also because it contributes to the learning process. The core function of the Birst Training is to take someone from Level 1 through Level 2.

Level 3 – Proficient. Has effectively applied training and experience to demonstrate competency, and can successfully perform common tasks consistently and without supervision or assistance.

Has sufficient confidence to attempt more complex and challenging tasks, whether or not successful. Level 3 is most often achieved by applying what you’ve learned to your own Birst environment.

BirstU Training Offerings

Birst University Foundations Public Training, Instructor-Led

Training agenda on pages 8-9



- Instructor led Foundations training is a 4-day class, can be attended for all 4 days, or 2 days depending on role
 - Days 1-2 Administrator/Back End Track
 - Days 3-4 Analyst/Front End Track
- Sessions types- **schedule on page 4-5**
 - in person
 - virtually
- Cost \$3,000 USD per attendee for 4 days, \$1,500 USD for 2 days
- Classes can be purchased through [Campus](#) with an existing Campus Card or Credit Card

Birst University Foundations Training On-demand, self-paced eLearning



- Birst Foundations topics are also available as pre-recording, self-paced eLearning videos in [Campus](#).
- Purchase of eLearning Foundations package includes access to 30+ foundational eLearning modules, exercises, and other supporting documents for 12 months from purchase date.
- Cost \$2,000 USD per package (modules can also be purchased separately)
- Package can be purchased through [Campus](#) with an existing Campus Card or Credit Card

Birst University Private Onsite or Virtual

Birst Course(s) selected by Client from available syllabi (Advanced syllabi will be sent on request)



- Customer chooses from available Birst Training Syllabi and BirstU trainer will come onsite to customer's desired location, or train virtually. Generally follows Birst Foundations
- Birst Training content, data sets and student accounts
- Maximum students = 12/instructor
- Minimum 2 days
- Cost \$5,500 USD per day (+ T&E if onsite)

Birst University Public Online Subscription

Further description on page 10



- 1 named license to the Birst Learning Management System. User will receive access to all on demand content, except the Foundations Course material for the duration of their subscription (12 months)
- Materials are primarily video based, but also include downloadable content for exercises and further narrative explanations for complex topics.
- New content regularly published
- Cost \$1,000 USD/user/year

Foundational Birst Training Agenda

This course covers our back-end and front-end modules and sets the foundations for success with Birst. The course is targeted to Birst administrators and developers who are new to Birst (refer to the Overview and Assumptions section on page 6.)

Admin Foundation Topics- 2 days

Space Management

- Understand Space Types
- Create Spaces
- Modify Space Properties
- Command Window

Data Acquisition

- Browser Upload
- Birst Connect
- Overview of Extractors (CRM's)

Data Modeling

- Model Data
- Keys
- Hierarchies
- Grains
- Targeting
- ETL Scripting

Space Customization

- Custom Measures and Attributes
- Variables
- Drill Maps
- Bucketed Measures

Data Validation

- Process Data
- View Details of Processed Data
- Validate data through reporting tools

Security/User Management

- Create and Manage Users
- Groups and Permissions
- Row Level Security
- Custom Subject Areas
- Custom Report Catalog (Catalog Security)

Other Topics

- Report Scheduling
- Exporting report data

Analyst Foundation Topics- 2 days

Report Development with Visualizer and Designer

- Report Creation
- Tables and Table Properties Charts
- Sorting/Filtering/Drilling
- Custom Expressions
- Layout Mode
- Grouping and Subreports
- Break By and Trellis
- GeoMaps
- Advanced Functions
- Report Scheduling

Dashboards Design

- Value Based Design
- Creating Dashboards
- Dashboard Layout
- Filters
- Key Performance Indicator (KPI) Tool
- Drill Across
- Custom Elements
- Themes

Birst University eLearning

Overview

One (1) named license in the Birst Campus Learning Management System. User will receive access to all on demand content except for the Foundations Course material for the duration of their subscription period. The materials are primarily video based, but also include downloadable content for exercises and further narrative.

Online material is divided into two major categories:

1. Learning Paths: A learning path is made up several courses that are related to an overall curriculum. These are guided courses and it is recommended that the user following the path as it is laid out There are a wide range of [advanced topics](#) available to choose from.
2. Topical Content: These are typically stand-alone courses that aim to dig into more difficult topics that do not fall into an overall learning path. Click on Birst on the Campus home page to view complete course listings.

Important! Most eLearning assumes you have access to a Birst account and can create a space in Birst, or have an assigned admin who can create a space for you to practice the exercises in.

Additional Birst eLearning Courses

Birst Foundations

Course Name	Campus Course Number
Birst: Foundations - Administration	00015180 (US) 00015180 (Non-US)
Birst: Foundations - Designer	00015181 (US) 00015181 (Non-US)
Birst: Foundations - Visualizer	00015620 (US) 00015620 (Non-US)
Birst: Foundations - Dashboards	00016122 (US) 00016122 (Non-US)

Birst Pronto Professional Edition

Admins	Campus Course Number
Birst: Professional Edition – Pronto Introduction and Overview	00014843 (US) 00014843 (Non-US)
Birst: Professional Edition – Visualizer Introduction and Overview	00014842 (US) 00014842 (Non-US)
Birst: Professional Edition – Dashboards Introduction and Overview	00014841 (US) 00014841 (Non-US)

Birst and CloudSuite Financials

For Admins	Campus Course Number
CloudSuite Financials & Supply Management: Introduction to Birst	00018067 (US) 00018067 (Non-US)
CloudSuite Financials: Analytics and Birst Setup and Troubleshooting	00017207 (US) 00017207 (Non-US)
CloudSuite Financials: v11.0.1 Setting Up Users, Groups, and Usage Recommendations in Analytics and Birst	00017499 (US) 00017499 (Non-US)
CloudSuite Financials & Supply Management: Administering Birst	00021158 (US) 00021158 (Non-US)

For End Users	Registration
CloudSuite Financials: Analytics and Birst End User Overview	00016763 (US) 00016763 (Non-US)
CloudSuite Financials & Supply Management: Using Birst Reporting and Analytics	00022254 (US) 00022254 (Non-US)

Birst Appliance

Course Name	Campus Course Number
Birst: Configuring and Installing the Birst Appliance	00016522 (US) 00016522 (Non-US)

Training FAQs

What's the maximum number of students per class?

Classes are interactive and entirely hands-on as you learn how to build a Birst space, and how to develop meaningful reports and dashboards that answer critical business questions. As a result, we find that 8-12 is an ideal number of students per class in order to ensure each student gets focused time with the instructor. If additional students need to attend, scheduling a second training session, or adding an additional instructor to accommodate the increase in attendance can be done by arrangement.

Can I customize on-site training?

Yes, within limits. We can combine our existing training modules in various ways to accommodate specific needs, but the overall structure of the training is designed to be cumulative, with each module building on the next. The curriculum walks you through sequential hands-on activities that help you learn and understand the most important concepts of working in Birst. As a result, we find it is best not to diverge too far from training best practices. Please speak to [Birst Education](#) to discuss any customizations you wish to consider.

Is the training based on our data?

Learning key Birst concepts and how the tool works can be better done with a data set that's been designed to illustrate those concepts and features. Instructors know this data set and how best to use it to show functionality and answer questions based on those features. This enables the most effective use of your time and ensures that the most important Birst concepts are thoroughly understood. Working with your data changes focus from training Birst concepts and diverts it to data issues.

Should I choose live training or a virtual training?

Birst offers live private customer on-site and live public training options, as well as live virtual training. Both live and virtual trainings cover the same materials, tools, and techniques, and have equal time with an instructor. Each has advantages and limitations. Consider which option best fits your needs when scheduling a training.

Fees for live customer trainings (virtual or in-person) are \$5,000.00/day + travel and expenses, if applicable, for up to 12 attendees (i.e. \$20,000/4 days).

A public training (virtual or in person) held online or at a designated Infor training location carries a standard fee of \$3,000.00/4-day class per person, or \$1500.00/2 day admin or analyst courses.

It may be more cost effective to opt for one over the other depending on the number of people who need training.

In-person instructor-led training

Whether you opt for a custom onsite or a public ILT, you have the benefit of having the instructor present in the room with you, able to quickly spot issues, troubleshoot, or answer questions in a one-on-one environment. It is often easier to maintain student engagement and enthusiasm in an in-person training than in a virtual one.

Virtual instructor-led training

Birst Education offers both private (at your convenience) and public (regularly scheduled) virtual trainings. Virtual Training contains the same content as in-person classes, but is delivered via Infor Campus WebEx.

The virtual classroom experience closely mirrors that of a physical classroom. Students are encouraged to ask and answer questions, and the instructor will ask for your participation by calling on you during training. This makes it easier to stay engaged and interested as you move through the exercises.

Virtual trainings offer flexibility and convenience as well as a cost savings since travel expenses are minimized. Some limitations inherent in remote attendance include student distraction or technology issues that may result in challenges in making sure everyone stays in step with the instructor.

What happens if I need to leave class to attend to work or personal issues?

Birst exercises build on each other. Stepping out in the middle of a training means you will be unable to continue with the exercises that day. Instructors are only able to update your training account to the current state at the end of each training day so that you may continue at the start of the following day. This can only be done upon request, and only at the instructor's discretion, dependent on class size and progress. Please be respectful of the instructor and your fellow attendees' time by honoring this policy.

There will be no refunds for missed training. If a student is absent from any portion of class, he/she can contact education@birst.com to discuss the possibility of make-up time/work. This is not guaranteed and will be at the sole discretion of Birst Education.

What if I have questions about class content outside of class?

Our instructors want you to be successful and will work with you to address your questions regarding the class lessons during a training. The Birst Community and the in-app Birst Help can often provide answers to common questions, and are recommended resources as you transition into the role of Birst user.