2019

Birst University Education Syllabus

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Welcome to BirstU

Birst, Inc. 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 eCourses, Birst training is an important part of ensuring a successful implementation. We recommend that at least two individuals go through the 4-day Birst Foundational Training

Training Delivery is offered in 3 formats:

- Public Instructor Led Training (In person and virtual)

- Private, On-Site Instructor Led Training (In person and virtual)

- On-demand, Self-paced eCourses (via our Learning Management System)

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.

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 Department of 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 a scheduled 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.

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2019 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 22-23 April 24-25	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 23-24	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

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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 March 6-7	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022461 00022558
April 10	Advanced Topics	00022672
June 12-13 June 19-20	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022462 00022559
August 7	Advanced Topics	00022670
October 30-31 November 6-7	Birst Foundations Administrator Training Birst Foundations Analyst Training	00022463 00022560

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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.

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BirstU Training Offerings

Birst University Foundations Public Training, Instructor-Led

Training agenda on pages 7-8

- Instructor led Foundations training is a 4-day class, can be attended for all 4 days, or 2 days depending on role
  - Days 1-2Administrator/Back End Track
  - Days 3-4Analyst/Front End Track
- Sessions types- **schedule on page 4**
  - 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 Public Online Subscription

Further description on page 9

- 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

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)

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Foundational Birst Training Agenda

This course will cover our back-end and front-end modules and set the foundational 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 5.)

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

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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

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Birst University Online Subscription

Overview

1 named license in the Birst 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
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

Check out Campus for a full listing of courses available in the Birst Subscription

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