Birst: Foundation for Administrators

This course covers Birst space creation and administration, including user and group administration, orchestration and column level security. This training is for version Birst 7.5 and all previous versions of 7.x. Course name/code**:** Birst**:** Foundation for Administrators / 01_0920740_IEN0082_BBI.

Course duration

16 hours

Prerequisite courses

- Recommended but not required-Birst**:** CloudSuite Analytics Modeler Administration Overview (01_0920740_EEN0093_BBI)
- Recommended but not required-Birst**:** Introduction and Overview (11_0920000_EEN0001_BBI)

Prerequisite knowledge

To optimize your learning experience, Infor recommends that you have the following knowledge prior to taking this course**:**

- Basic Structured Query Language (SQL) experience
- An understanding of business intelligence history, objectives, and uses
- Basic understanding of reporting and analytics

Course agenda

The agenda below details the contents of this course, including lesson-level learning objectives and supporting objectives.

Lesson	Lesson title	Learning objectives	Estimated time (hours)
Course overview		Review course expectations.	.50
1	Introduction	Describe the training scenario, data model, and basic Birst features found on the Spaces and modules pages.	.25

Lesson	Lesson title	Learning objectives	Estimated time (hours)
		• Describe the training scenario and the primary analyses. • Describe the function of keys in data sources. • Define fact and dimension tables and their relationship to measures and attributes. • Describe the features located on the Birst home and modules screens.	
2	Create a Birst space and upload data	Create a Birst space and upload data. • Log in to Birst. • Create an Enterprise (or Professional) Birst space. • Import data into Birst.	.25
3	Enable sources in Birst	Enable data sources in Birst. • Enable data sources in Birst.	.25
4	Build hierarchies	Build hierarchies. • Build source hierarchies. • Create and name hierarchy levels. • Set level keys.	.75
5	Target source columns to hierarchies	Target source columns to hierarchies. • Target source columns to their hierarchies; set Analyze By Date.	1.0
6	Assign grains to sources	Assign grains to sources. • Define grains. • Explain how they relate to source keys. • Assign the grain for each source.	1.0
7	Publish data and check in Visualizer	Publish data to create the data warehouse. • Publish data. • Review the star schema in Data Flow view.	.25

Course Description/Agenda

Lesson	Lesson title	Learning objectives	Estimated time (hours)
		• Review the data in Visualizer. • Create a report in Visualizer to validate the data model.	
8	Use Shared Connections to refresh data	Connect to a Shared Connection. • Locate and connect to a Shared Connection. • Review and upload data from the connection. • Model the data by targeting the new columns. • Publish the data to update the data model. • Create a report in Visualizer to validate the data model.	.75
9	Create scripted sources	Create scripted sources. • Create a scripted source for SalesOrder_Details. • Create a scripted source for Products and Categories. • Target the new sources and check grains. • Hide the original sources. • Delete the Categories hierarchy. • Check the grain of the new scripted sources. • Publish data and validate in Visualizer.	1.25
10	Create variables	Create variables using Admin and use in reports. • Create variables using Admin. • Build a Designer report to use the Current Year variable. • Create a filter variable using Expression Builder. • Build a Visualizer report to use the Current Month variable.	.50

Lesson	Lesson title	Learning objectives	Estimated time (hours)
11	Create a drill map	Create a drill map. • Create a drill map. • Test the drill map in a Visualizer report.	.50
12	Create an Orchestration workflow	Create and schedule an Orchestration workflow. • Describe Orchestration workflows. • Create and schedule a workflow. • View run history.	.50
13	Locate logs using Monitoring	Review the logs using Monitoring • View the logs in Monitoring. • Review the logs for your Orchestration workflow.	.25
14	Add users to a space	Add users to a space. • Add users to a space using Space Membership. • Add the instructor and make them a Space Admin.	.50
15	Create new user groups and assign users	Create new user groups and assign users. • Create new user groups. • Assign the correct Birst tools to each group. • Assign users to the correct groups.	.50
16	Duplicate a space and rename it	Duplicate an existing space and rename it. • Create a copy of the DEV space and rename it DEV2.	.25
17	Manage the Report Catalog	Manage the Report Catalog. • Create folders for each user group. • Copy relevant reports for the various groups into their folders. • Assign the correct security (read/write access) to each folder.	.75

Lesson	Lesson title	Learning objectives	Estimated time (hours)
		• Upload image files to an image folder.	
18	Create custom Subject Areas	Create custom Subject Areas. • Add a new Subject Area. • Add the correct user groups to the Subject Area. • Add measures and attributes to each Subject Area. • Verify that the new Subject Area appears in Visualizer.	.50
19	Implement column level security	Implement column level security on reports. • Create a column security Subject Area and add data. • Add the group with access to the secure data. • Apply column level security to a space. • Create a Visualizer report using secured columns for two user groups. • Add the test report to a dashboard. • Use test group member logins to verify the columns are secured by username.	.75
20	Copy groups and users into a new space	Copy users and groups from one space to another. • Use Space Properties to locate and record the Space ID for both DEV spaces. • Use Command Window to copy space members and permissions from the DEV space to the DEV2 space. • Review space members and groups in DEV2 to validate they are present.	.25
Course summary		Debrief course.	.50