



Birst: Foundation for Analysts

Formerly Birst: Foundation for Business Users. This course covers analytics topics in Birst Enterprise Designer 2.0 (HTML5) and Visualizer modules, as well as the design and construction of Dashboards. This training is for Birst version 7.6 and all previous versions and is recommended for data analysts, business analysts, and report specialists who want to create insightful visualizations and dashboards. Topics include: Designer overview, Birst Query Language (BQL), Designer chart creation, banded reports, creating subreports, embedding a subreport into a container report, bursting reports, Visualizer overview, chart creation in Visualizer, creating complex charts, geomaps, using column selectors, tables and crosstabs, dashboard planning, dashboards overview, creating and enhancing a display dashboard, and drill across. This course is tool-centric meaning that exercises are not based on any specific Infor product.

This course is not suitable for functional end users; instead, they should attend the **Birst: Using Dashboards and Visualizer** course. If you also manage Birst spaces, the **Birst: Foundation for Administrators** course is recommended. Previous course name/code: Birst: Foundation for Business Users / 01_0920740_IEN0092_BBI.

Course duration

16 hours

Prerequisite courses

- Recommended but not required – Birst: Introduction and Overview (11_0920000_EEN0001_BBI).
- Recommended but not required – Birst: Foundation for Administrators (01_0920740_IEN0082_BBI).

Prerequisite knowledge

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

- An understanding of business intelligence history, objectives and uses
- Basic understanding of reporting and analytics
- Basic SQL experience

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	Designer overview	<p>Describe the Designer module and its features and functions.</p> <ul style="list-style-type: none">• Describe the designer modes.• Identify the differences between Designer and Visualizer reports.• Define the Designer anatomy and its various tools.• Describe how to create a basic report.• Identify how to add filters.• Explain how to sort columns.	1.5
2	Banded reports	<p>Explain how to create a banded report.</p> <ul style="list-style-type: none">• Identify how to build a report in Layout mode.• Describe the outcome of layout build in Results mode.	1.0
3	Birst Query Language (BQL)	<p>Describe and apply Birst Query Language (BQL)</p> <ul style="list-style-type: none">• Identify the correct syntax for BQL.• Explain how to create BQL expressions with data fields and formatting in Designer.	.75
4	Designer chart creation	<p>Create a chart using various charting features.</p> <ul style="list-style-type: none">• Explain how to add a chart to the report.• Define chart properties.	1.0

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		<ul style="list-style-type: none"> Define chart formatting options. 	
5	Creating subreports	<p>Create a subreport to embed in an existing report.</p> <ul style="list-style-type: none"> Describe how to create a subreport. Identify how to hide the table. Explain the setup when considering the report page size of a Subreport. Explain the passing of filter parameters. 	.50
6	Embed subreport into the container report	<p>Embed the subreport into the existing banded report.</p> <ul style="list-style-type: none"> Configure the subreport to fit into the container report. 	.50
7	Bursting reports	<p>Create and distribute individualized reports by audience needs.</p> <ul style="list-style-type: none"> Identify the pieces needed to set up a bursting report Explain how to distribute a banded report to an email list. Describe the filter requirements on a content report. Explain the scheduling set up in the Admin module. 	.75
8	Visualizer overview	<p>Describe the Visualizer module.</p> <ul style="list-style-type: none"> Identify the areas of the Visualizer. Describe how to create a visualization. Explain how to enhance a visualization. 	.50
9	Chart creation in Visualizer	<p>Use Visualizer features and formatting to create a chart.</p> <ul style="list-style-type: none"> Add time series measures and attributes. Change layer chart type. 	1.0

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		<ul style="list-style-type: none"> • Update field names. • Change Top N settings. • Add display values. • Use filters. • Experiment with available chart formatting options. 	
10	Creating complex charts	<p>Create several charts using different chart types and/or measures in multiple ways.</p> <ul style="list-style-type: none"> • Create a bubble chart. • Create a heatmap. • Use a single measure as a measure, a filter, and to sort. • Use a single measure as two different aggregation types. 	.50
11	Geomaps	<p>Create geomaps and use different layer types.</p> <ul style="list-style-type: none"> • Create a single layer geomap. • Create a geomap with a second geo-attribute as a new layer. • Change geo-attribute layer types. 	.50
12	Using column selectors	<p>Create a column selector chart then preview it using advanced tools.</p> <ul style="list-style-type: none"> • Create a base report. • Add column selectors using advanced tools. • View the column selectors as a preview. 	.25
13	Tables and crosstabs	<p>Use tables and crosstabs in Visualizer.</p> <ul style="list-style-type: none"> • Create a table and crosstab report. • Change table formatting. • Create a custom measure. 	.75

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		<ul style="list-style-type: none"> • Add conditional formatting. • Configure a drill map. 	
14	Dashboard planning	<p>Use value-based design to plan your dashboards.</p> <ul style="list-style-type: none"> • Design a display dashboard. • Design a diagnose dashboard. • Design a decide dashboard. 	.25
15	Dashboards overview	<p>Describe how to use the features and functions of the dashboard and create a new dashboards page.</p> <ul style="list-style-type: none"> • Identify how to access dashboards. • Describe the anatomy of a dashboard. • Identify the difference between the Edit and Published views. 	.25
16	Enhance the display dashboard	<p>Enhance the display dashboard.</p> <ul style="list-style-type: none"> • Build KPIs. • Import images. • Add and arrange reports. • Add and explore filters. 	1.0
17	Create a diagnose dashboard	<p>Build a diagnose dashboard and create a dashboard collection to hold completed dashboards.</p> <ul style="list-style-type: none"> • Create a new dashboard. • Experiment with dashboard collection options. • Arrange reports using Column layout. • Add background images and colors. • Add existing charts. • Add an embedded filter. 	.75

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18	Drill across	<p>Apply drill navigation with and without passing filter parameters.</p> <ul style="list-style-type: none"> • Configure a navigation drill on a button. • Configure a navigation drill on a report that will include a filter parameter. • Describe dashboard feature functionalities. 	.75
Course summary		Debrief course.	.50

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