

# XBR & Balance Course Catalog

January 2012 -  
March 2012

## Table of contents

Quick overview	2
Training	3
Software training (classroom)	4
Software training (WebEx)	5-7
Train-the-trainer (classroom)	7
Pricing	8
Course schedule	9
Registration form	10
Travel information	11

## Quick overview

Your company today is different. Change is constant. New people are on staff; new hardware or software may have been added; new procedures are in place. The good news is that XBR® Loss Prevention and Store Analytics and Balance™ Sales Audit are made to adjust with your changes.

Whether you need basic training for new users or skill development for experienced users, the Training Team can help. They developed seminars specifically for XBR and Balance, addressing the techniques and best practices for maximizing ROI.

This booklet describes the standard curriculum offered by the team. A new schedule of course offerings is published quarterly, making the courses available to you when you need them. Courses are available online as well as in our Westboro, MA office. If you prefer to have training conducted at your office, special arrangements can be made. Investing in MICROS-Retail Analytics applications was a good decision. Investing in training helps you ensure high returns in both the short term and in the long run.

### FREE “New Feature” WebEx Sessions!

New Feature sessions can be scheduled, at NO Cost, by emailing: [training@micros-retail.com](mailto:training@micros-retail.com)!

These sessions are customized for your organization to review new end-user functionality that has been developed since the product version that you are currently using!

Email us now, [training@micros-retail.com](mailto:training@micros-retail.com), to schedule a convenient date and time for your team to participate!

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## Training

### Training to fit your needs

Our comprehensive training program is designed to provide users with the tools needed to immediately maximize their use and management of the Analytics application. The available classes are designed to deliver application training through instructor-led and web-based sessions. Participants will learn how to navigate and operate the application, as well as discuss methodologies and best practices designed to ensure effective and efficient use of the system.

Training is offered on all of the key system functionality from beginner to advanced level topics. The various curriculums outlined herein satisfy a variety of training needs based on various levels of user proficiency. Our programs are designed to fit your departmental structure as well, including the various types of user level involvement with your Analytics application.

Can't find what you are looking for? Classes can be developed or customized to fit the specific needs of your department or company. We will work with you to design a training session tailored to help your organization achieve the greatest success in using the MICROS-Retail Analytics applications.

### Flexibility

We strive to provide our customers with flexible training options that fit any busy schedule. Our courses are offered as two-day sessions at our offices or at yours.

For those who cannot be away for too long or for those who want training on specific functionality, key topics have been broken out into concise online training sessions. These WebEx courses are also a great way to periodically brush up on your skills.

### Approach

Each member of our professional training staff has a strong background in providing a highly effective training environment. Regardless of the format, each class is delivered with a logical and easy to follow approach. A combination of lecture and hands on activity helps to provide users with greater understanding and sense of confidence.

### Registration

See our training calendar for currently scheduled courses. You can register for any of the open sessions by sending an email request to [training@micros-retail.com](mailto:training@micros-retail.com) or by returning the enclosed registration form. We will confirm your registration and provide you with all of the details you will need for your selected session(s).

If you would like to explore custom training at your offices, please email us at [training@micros-retail.com](mailto:training@micros-retail.com). A MICROS-Retail Instructor will contact you to discuss your needs.

<b>Software training courses (classroom)</b>	
<i>Course name</i>	<i>Course description</i>
<b>Balance Fundamentals</b> (1 day) For new users	A new user will acquire the ability to manage, correct, and reconcile sales data for delivery to downstream systems and financial reporting. <ul style="list-style-type: none"> <li>• How to review audit errors, correct transactions, add new transactions and resolve over/short conditions</li> <li>• GL posting</li> <li>• An Analytics class is recommended to learn about managing Adhoc queries and other reporting functionality</li> </ul>
<b>Analytics for Balance Users</b> (2 days) For all Balance users	Provides Balance application users with the skills necessary to manage their reports, users, and overall application efficiency. <ul style="list-style-type: none"> <li>• Managing Adhoc queries and reviewing query results</li> <li>• Scheduling reports to run automatically</li> <li>• Building and modifying Adhoc reports and query links</li> <li>• Familiarizing users with System Administrator functions</li> </ul>
<b>Web Application Training</b> (1 day) For all Web Application Users	Provide Web Application users with the skills necessary to manage their Adhoc and exception reports as well as customize their web application user preferences. <ul style="list-style-type: none"> <li>• Manage Adhoc queries and review query results</li> <li>• Schedule reports and alerts to run automatically</li> <li>• Track progress of exception reports and record resolution notes</li> </ul>
<b>Analytics Fundamentals</b> (2 days) For new users	A new user will have gained the ability surface exceptions, investigate suspicious activity, and identify internal training issues. <ul style="list-style-type: none"> <li>• Working with Analytics queries and reviewing query results</li> <li>• Surfacing exceptions with Control Points</li> <li>• Scheduling reports and alerts to run automatically</li> <li>• Customizing user preferences</li> </ul>
<b>Analytics Intermediate</b> (2 days) Prerequisite: Analytics Fundamentals or equivalent product experience	Provides proficient Analytics users with a greater ability to manage their XBR reporting. <ul style="list-style-type: none"> <li>• Data organization and terminology</li> <li>• How to build a new Adhoc, Drill Down, and Control Point query</li> <li>• How to modify reports by updating fields, adding fields and parameters, using calculations, and linking</li> <li>• How to establish Master File distributions, and how to utilize Query Scheduler to manage scheduled reports</li> </ul>
<b>XBR Boot Camp Training</b> (3 days)	Provides savvy users with a fast paced training session that includes a blend of fundamental and Intermediate training objectives. <ul style="list-style-type: none"> <li>• Managing query results by linking, sorting, filtering, exporting and printing</li> <li>• Managing exceptions with Control Point functionality (XBR)</li> <li>• Setting queries up to automatically generate results</li> <li>• Building new Adhoc reports</li> <li>• Converting Adhocs into Drill Downs and Control queries</li> <li>• Familiarizing users with System Administrator Functions</li> </ul>

<b>Software training courses (WebEx)</b>	
<i>Course name</i>	<i>Course description</i>
<p><b>Query Basics with Adhocs</b> (1.5 hours) For new &amp; experienced users who want a review of the basics</p>	<p>This class provides an introduction to running Adhoc queries and managing data results in both the desktop and the web application.</p> <ul style="list-style-type: none"> <li>• Sorting and filtering query results</li> <li>• Reformatting the results of a query</li> <li>• Exporting and printing query results</li> <li>• Linking to Adhoc queries</li> </ul>
<p><b>Foodservice: Query Basics with Adhocs</b> (1.5 hours) For new &amp; experienced users who want a review of the basics.</p>	<p>This class provides an introduction to running Adhoc queries and managing data results in both the desktop and the web application.</p> <ul style="list-style-type: none"> <li>• Sorting and filtering query results</li> <li>• Reformatting the results of a query</li> <li>• Exporting and printing query results</li> <li>• Linking to Adhoc queries</li> </ul>
<p><b>Scheduling Queries &amp; Alerts</b> (1.5 hours) For users with an understanding of query basics</p>	<p>This session will:</p> <ul style="list-style-type: none"> <li>• Review setting up distribution preferences for individual Analytics users as well as distribution settings for Master File Distribution</li> <li>• Demonstrate the setting of alert criteria for one or more users</li> <li>• Introduce the query Scheduler, which is used to manage scheduled reports and recipients from a central location</li> </ul>
<p><b>Managing Control Queries &amp; Exceptions (XBR only)</b> (1.5 hours) For users with an understanding of Query basics</p>	<p>This class provides users with the ability to properly set up controls and to utilize exception management techniques better for overall system management in both desktop and web application.</p> <ul style="list-style-type: none"> <li>• Tracking investigation progress</li> <li>• Recording resolution notes</li> <li>• Defining thresholds</li> <li>• Creating control groups</li> </ul>
<p><b>Foodservice: Managing Control Queries (XBR only)</b> (1.5 hours) For users with an understanding of Query basics</p>	<p>This class provides users with the ability to properly set up controls and to utilize exception management techniques better for overall system management in both desktop and web application.</p> <ul style="list-style-type: none"> <li>• Tracking investigation progress</li> <li>• Recording Resolution Notes</li> <li>• Defining thresholds</li> <li>• Creating Control Groups</li> </ul>
<p><b>Building New Adhocs</b> (1.5 hours) Requires a basic understanding of the application's functionality and familiarity with the System Tables</p>	<p>Users will be provided with the ability to modify the definition of exiting reports and to build new reports using available data.</p> <ul style="list-style-type: none"> <li>• Define query properties, data files, and fields</li> <li>• Creating calculations and subtotals</li> <li>• Setting up filter expressions, query parameters, and permanent filters</li> <li>• Creating Query links and identifying link fields to ensure desired results</li> </ul>
<p><b>Creating New Exception Reports (XBR Only)</b> (1.5 hours) Requires familiarity with building and modifying queries</p>	<p>This course will provide users with the ability to create Control Point queries and Drill down queries for an Adhoc report.</p> <ul style="list-style-type: none"> <li>• Create Drill Down paths or select pre-existing paths</li> <li>• Identify Control Targets</li> <li>• Generate new control measures for new control points</li> </ul>

## Software training courses (WebEx)

### Course name

### Course description

#### **WebApp for Field Users** (1.5 hours)

This session educates users on how to get the most expedient results while managing reports and exceptions remotely.

- Managing Adhoc query results by sorting, filtering, linking, exporting and printing data results
- Scheduling queries to run automatically
- Reviewing Exception results and managing suspicious activity

#### **WebApp for System Administrators** (1.5 hours)

This session is designed to educate System Administrators and other Desktop application users how the field will be using the WebApplication as well as how to manipulate the Desktop application to produce applicable results in the WebApplication.

- Creating, maintaining and deleting User Profiles
- Maintaining threshold values for exception reports
- Retrieving Exception results by running and scheduling Control Point queries
- Managing Adhoc query results by sorting, filtering, linking, exporting and printing data results
- Scheduling queries to run automatically
- Reviewing Exception results and managing suspicious activity

#### **Table Editor: Case & Incident Management** (1.5 hours)

This session provides System Administrators and others with appropriate security access the skills to manage date entry for cases, incidents, and other areas. Users will be able to report immediately on entered data thru Analytics for visibility and tracking purposes.

- Understanding user access to tabs and blocks in Table Editor
- Creating, modifying, and deleting tabs and blocks
- Updating case in and incident entries
- Reviewing case and incident related reports in Analytics

#### **Trans Audit Summary (Balance Only)** (1.5 hours)

Provides users with the ability to resolve suspended data records and review exception audit activity that affects GL Posting.

- Accommodate missing transactions
- Resolve trapped data errors
- Accept duplicate transactions and audit controls as well as review over/short data
- Gain an enhanced understanding of how resolving the trapped data can affect other downstream reporting systems like the General Ledger

#### **General Ledger Posting (Balance Only)** (1.5 hours)

Provides users with the necessary tools to post records to the general ledger as well as review more detailed reports supporting the data.

- Examine the various General ledger buckets
- Post data entries to the General Ledger
- Sort and Filter the General Ledger buckets to streamline posting options
- Link to Balance reports for more detail, such as viewing general Ledger account numbers

#### **Liabilities Management/Bank Recon Review (Balance Only)** (1.5 hours)

Provides users with the opportunity to assess outstanding liabilities and to reconcile deposit activity between stores/locations and banks

- Understand and manage Liabilities Management data from the Aging tab
- Identify data that can be written off from the Liabilities Management Exceptions view
- Use Bank Reconciliation functionality to match store deposits to bank deposits
- Manage adjustments/deposits as needed to help reconcile deposit activity between stores and banks

## Software Training Courses (WebEx)

### Course Name

### Course Description

**System Administrator Functions**  
(1.5 hours)  
For System Administrators

- Introduces the system administrator functions in Analytics.
- Creating user profiles
  - Maintaining classifications and libraries
  - Creating and modifying data names, policy notes, dynamic groups, etc.
  - Using Query Scheduler to manage scheduled reports
  - Purging exceptions

## Train-the-trainer (classroom)

### Course name

### Course description

**Train-the-Trainer**  
(3.5 days)

This course is designed for XBR customers who desire the ability to provide their own internal training to new users. Upon successful completion of this course, participants will receive their “XBR Certified Trainer” certificates. XBR Certified Trainers provide their organizations with the ability to manage their own training needs on an ongoing basis.

- How to prepare for the delivery of training, including the preparation of training scripts
- Creating customized exercises
- Using the courseware for the greatest impact
- Classroom management
- General presentation tips.

Participants will have the opportunity to demo teach their new training skills by presenting material to the class.

## Recommended WebEx sessions

### Balance users

- Query Basics with Adhocs
- Scheduling Queries & Alerts
- Building New Adhocs
- System Administrator Functions
- Data Dictionary/Table Editor

### XBR retail/grocery users

- Query Basics with Adhocs
- Managing Control Queries & Exceptions
- Scheduling Queries & Alerts
- Building New Adhocs
- Creating New Exception Reports
- System Administrator Functions
- Data Dictionary/Table Editor

### XBR foodservice users

- Foodservice: Query Basics with Adhocs
- Foodservice: Managing Control Queries & Exceptions
- Scheduling Queries & Alerts
- Building New Adhocs
- Creating New Exception Reports
- System Administrator Functions
- Data Dictionary/Table Editor

## All-day session pricing

All day classes	Time required—client site \$1320 per day	Time required—MICROS-Retail \$1320 per day
WebApplication Training	2 days (includes prep work)	Not Applicable
Fundamental Training	3 days (includes training preparation for live data training)	2 days (facilitated using demo data)
Intermediate Training	3 days (includes 1 day of training preparation for live data training)	2 days (facilitated using demo data)
Balance Training	3 days (includes training preparation for live data training)	2 days (facilitated using demo data)
Train-the-Trainer: Fundamental Training	5 days (includes training preparation for live data training)	4 days (facilitated using demo data)
Train-the-Trainer: Intermediate Training	5 days (includes training preparation for live data training)	4 days (facilitated using demo data)

## WebEx session pricing

### WebEx guidelines

- Each session is schedule to run approximately 1.5-2 hours.
- Costs and information listed are per session.

WebEx Sessions	Cost	Limitations
<b>Published Sessions / Demo Data</b>	\$250.00 per session	Unlimited Participants
<b>Sessions with Client “Live Data”</b>	\$165.00 per hour	Minimum 2 hours Maximum 4 hours 1 hour prep time required
<b>Custom WebEx Sessions</b>	\$165.00 per hour	Minimum 2 hours Maximum 4 hours 1 hour prep time required

### WebEx sessions

- Query Basics with Adhocs
- Managing Control Queries & Exceptions
- Scheduling Queries & Alerts
- System Administrator Training
- Building New Adhocs
- Creating New Exception Reports
- Web Application for Field Users
- Web Application for System Administrators/Managers
- Table Editor/Case & Incident Management
- Trans Audit Summary
- Bank Reconciliation/Liabilities Management
- General Ledger/Over-Short

## Course Schedule, January—March 2012

### Registration information

To register for a class, or to discuss developing a customized session, use the form on the following page or email your inquiry to: [training@micros-retail.com](mailto:training@micros-retail.com). A MICROS-Retail Instructor will contact you.

### All-day classes

#### **9:00 am–4:00 pm in Eastern Time**

01/10-01/12	XBR Boot Camp Training
01/18-01/19	XBR Fundamental Training
01/25/01/26	XBR Intermediate Training
02/07-02/08	XBR Boot Camp Training
02/15-02/16	XBR Fundamental Training
02/21-02/22	XBR Intermediate Training
03/06	Balance Training
03/07-03/08	XBR Fundamental Training
03/14-03/15	XBR Intermediate Training

### WebEx schedule

#### **1:30 pm–3:00 pm Eastern Time**

01/04	Managing Control Queries and Exceptions
01/05	Scheduling Queries, Alerts and EVD reports
01/06	System Administrator Functionality
01/09	Balance Overview
01/13	Web Application Overview
01/17	Building New Adhoc Queries
01/20	Creating New Exception Reports
01/23	Managing Query Basics with Adhocs
01/30	Managing Control Queries & Exceptions
02/02	Balance Overview
02/03	Web Application Overview
02/10	Scheduling Queries, Alerts and EVD reports
02/13	Building New Adhoc Queries
02/14	Creating New Exception Reports
02/17	System Administrator Training
03/02	Web Application Overview
03/09	System Administrator Functionality
03/12	Managing Query Basics with Adhocs
03/22	Building New Adhoc Queries
03/23	Balance Overview
03/26	Managing Control Queries & Exceptions
03/29	Creating New Exception Reports

### **FREE—New Product Feature**

#### **WebEx Sessions**

Email: [training@micros-retail.com](mailto:training@micros-retail.com) today to schedule a session for your team! Discover what's new in our products!

## Registration form

### MICROS-Retail analytics training January—March 2012

Course title \_\_\_\_\_

Location \_\_\_\_\_

Date \_\_\_\_\_ Time \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/state/zip \_\_\_\_\_

#### ***Billing contact***

Name \_\_\_\_\_

Billing contact email \_\_\_\_\_

Phone \_\_\_\_\_

Signature \_\_\_\_\_

Purchase order # \_\_\_\_\_

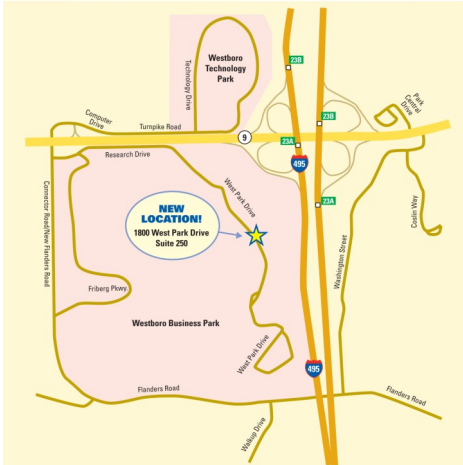
**Fax completed form to + 1 508.647.9495**

Participant's name	Participant's email	Cost \$ (US)

or mail completed form to:

MICROS-Retail  
1800 West Park Drive., Suite 250  
Westboro, MA 01581

Upon receipt of this form, a MICROS-Retail Instructor will call the billing contact to confirm participation and arrange payment.



## Travel & lodging

### Airports

The Westboro office and training site is 60 miles north of the Providence, RI airport (Theodore Francis Green Airport, code PVD) and 37 miles to the southwest of Boston's Logan International Airport (code BOS).

#### **Directions from BOS**

**Destination:** 1800 West Park Dr., Suite 250, Westboro, MA

- Take Interstate 90 West/Mass Pike
- Take 495 North (there are tolls)
- From 495 North, take exit 23B, Route 9 West
- Take exit toward Computer Dr.
- Left onto Connector Rd./New Flanders Rd.
- Left onto Research Dr.
- Continue on West Park Dr.

#### **Directions From PVD**

**Destination:** 1800 West Park Dr., Suite 250, Westboro, MA

- Take Interstate 95 North toward Providence
- Take Interstate 495 North toward Worcester
- Take Route 9 West
- Take exit toward Computer Dr.
- Left onto Connector Rd./New Flanders Rd.
- Left onto Research Dr.
- Continue on West Park Dr.

### Lodging

Lodging. Though many hotel options are available in the area, these hotels are close to the office and offer pleasant accommodations.

#### **Doubletree Hotel Boston/Westborough**

5400 Computer Drive Westboro, MA

+1 508.366.5511

Approximately 0.3 miles from the office

Amenities: Restaurant/lounge on site, fitness center, and indoor pool.

#### **Courtyard-Boston Westborough**

3 Technology Drive Westboro, MA

+1 508.836.4800

Approximately 0.5 miles from the office

Amenities: Restaurant/lounge on site, fitness center, and indoor pool.

#### **Residence Inn–Boston Westborough**

25 Connector Road Westboro, MA

+1 508.366.7700

Approximately 0.8 miles from the office

Amenities: Fitness center, pool, complimentary breakfast. There is no restaurant/lounge on site.



**Corporate Headquarters**

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