

Becoming an iRise Certified Expert™

The **iRise Certified Expert** designation provides an opportunity for iRise users to elevate their status to the top tier of iRise professionals. This proctored, on-site exam is comprised of a series of hands-on exercises using iRise Studio that test candidates' skill in applying their knowledge and experience on projects. Candidates are expected not only to have the product knowledge and essential skills required of iRise Certified Modelers, but also the ability to leverage advanced modeling techniques to visualize complex requirements.

The two-hour exam is time-boxed so candidates can demonstrate rapid visualization techniques that are so important in a real project environment. Candidates must demonstrate a minimum proficiency on each part of the exam to achieve certification. Given the certification approach, individuals are strongly discouraged from seeking certification before taking the appropriate iRise training courses and before gaining skills and experience from using iRise on projects.

General Preparation

Qualification to take the **iRise Certified Expert** exam requires that you first attain iRise Certified Modeler status for the same version of iRise. We also strongly recommend that you take the *iRise Advanced Training* course, and that you have at least one to two months of concentrated project experience using iRise.

Grading

The **iRise Certified Expert** exam contains several linked exercises, each comprised of several steps. Points are awarded per step, and each step is worth a given number of points. A minimum score of 70% is required to pass the exam.

The grader is looking for the individual step to work as defined by the requirements, and will not deduct for non-functional errors (i.e., spelling, exact positioning of widgets, etc.).

You will receive partial credit for an exercise if any individual step in the exercise is completed correctly. For example, let's say one of the exercises has a total of five steps, and each step is worth 10 points. If steps 1 and 2 are completed fully, step 3 is completed partially, and steps 4-5 were not performed, the grader will award 20 points (10 points each for steps 1 and 2, and zero points for steps 3-5).

What to Study

A solid understanding of the following topics will greatly increase your chances of passing this exam. Although we provide a list of available resources in a later section of this guide, keep in mind that the necessary level of familiarity with these topics can really only be gained by using iRise on projects, ideally in combination with formal training and/or mentoring from iRise staff.

Below the list of topics is a sample exercise similar to those in the **iRise Certified Expert** exam. This exercise will help you gauge your preparedness for the exam, and give you a preview of the exam content so you know what to expect.

- Creating, organizing and managing iRise projects
- Identifying the names and locations of key components in the Studio modeling environment
- Defining scenarios
- Laying out a page using standard page widgets
- Setting up page navigation
- Setting up Rules based on user input or data to control simulation elements such as dynamic displays and navigation
- Creating dynamic displays using alternate views
- Building and using templates and masters
- Creating and editing styles
- Using common page actions such as Show/Hide Widgets, Switch Views and Edit User Inputs
- Creating/updating datasheets
- Building forms and capturing form data
- Visualizing data flow using the Clipboard and Record widgets
- Displaying data dynamically using common methods such as Data Tables and dynamic Text widgets
- Writing requirements using Document Text
- Exporting iDocs and other project deliverables
- Gathering feedback and guiding simulation reviewers
- Clearing data from the Clipboard
- Using data in a datasheet to control a dynamic display
- Using data on the Clipboard to control a dynamic display
- Configuring a Get Record widget to display Clipboard data
- Using Where conditions both in filtering records and updating multiple records
- Defining logic for branching navigation using decisions
- Using various Operators (e.g., Date, Sequence, Range, and Count Operators)
- Performing simple calculations using the Expression widget
- Triggering an event with a Drag and Drop interaction

Sample Exercise – iRise Certified Expert Exam

In preparation for this sample modeling exercise, visit your personal banking site. Study the login process and screens. Login to your account and access your accounts page. Examine how your accounts are structured. Access an individual account and examine how individual transactions are listed. If possible, save a copy of the bank logo or capture the image using a screen capture tool. This exercise should be completed in 20-30 minutes.

(Download solution iDoc here)

Task Objectives

Visualize a scenario flow for an online banking application in which the user creates a new account. The scenario will involve the reviewer entering personal information into a form, displaying that information on another page where they will confirm that the information is accurate, and finally, entering asset information that will be displayed in a table along with a running total of the amounts entered.

Steps	Points	Requirements
1	10	<ul style="list-style-type: none"> Create a new project in iRise Studio called Certification Guide Exercise. Create a Header Master with dimensions of 800x150 pixels.. Add the screen shot of your bank logo to the Master. Create a template called Account Template with dimensions of 800x600 pixels. The Account Template should contain the Header Master across the top.
2	10	<p>Edit the Header Master</p> <p>The following dynamic features should be added to the Header Master.</p> <ul style="list-style-type: none"> The logo should be hyperlinked to your bank’s home page. In the upper right corner of the master, the current date should be displayed dynamically in the format MMMM d, yyyy.
3	10	<p>Open New Account Scenario</p> <p>Create a Scenario called Open new account with three pages: New User Sign Up Page, Legal Agreement Page and Fund Account Page. The layout of each page should match that of the Account Template.</p>



4	20	<p>New User Sign Up Page</p> <p>The New User Sign Up Page, should contain a form that captures the following data from the user. Each field should be appropriately labeled:</p> <p>PERSONAL INFORMATION</p> <ul style="list-style-type: none"> • First name • Last name • Address • Phone number (Use validation to enforce the phone number format) • Social Security Number (Mask this field) <p>JOB INFORMATION</p> <ul style="list-style-type: none"> • Company name • Company address • Company phone • How long employed? • Job Title • Annual Salary <p>ACCOUNT INFORMATION</p> <p>ACCOUNT TYPE (Allow the user to select from Money Market, Brokerage or Passbook)</p>
5	20	<p>Legal Agreement Page</p> <ul style="list-style-type: none"> • The Legal agreement Page should display all of the data captured on the New User Sign Up Page. • Add the follow text to the bottom of the page: I, [first name & last name], CERTIFY THAT ALL OF MY INFORMATION IS TRUE AND CORRECT. • The text [first name & last name] should be dynamically populated with the user's first and last name. • A checkbox should be added to the left of the "I, [first name & last name], CERTIFY THAT ALL OF MY INFORMATION IS TRUE AND CORRECT" text. • Selecting the checkbox should trigger navigation to the Fund Account Page.

6	20	<p>Fund Account Page</p> <p>On the Fund Account Page, the user should be able to fund their new account from any number of sources. The user should complete a form that captures:</p> <ul style="list-style-type: none"> • Source • Funding Account Type (Checking, MMA, Savings, Brokerage) • Routing Number • Account/SWIFT Number • Funding Amount <p>Each new funding source will be displayed in a table below the form. The table should show a running total of the amounts entered by the user.</p>
7	10	Export the requirements document (RTF file) for the project. Export an iDoc for the project.

How Exercises Are Scored

In this exercise, the total number of points available is 100. The grader will step through the exercise ensuring that the requirements for each step have been simulated and function as specified. Full points will be awarded for each step when the requirements for that step are satisfied. No points will be awarded for the step if the requirements are not fully met.

Hints/Tips for Exercises

- Read the Background information, Task Objectives and Task Completion Criteria for each exercise before attempting the exercise, as they provide useful contextual cues and a summary checklist for building your simulation. As you complete the exercise, check off the items in the Task Completion Criteria.
- For each exercise, remember that you can receive partial credit for completing individual steps. Even if you're not confident that you can complete the entire exercise, typically you will be able to complete at least the initial steps of the exercise.
- Remember that grading is based on meeting the requirements for each individual step. Aspects of the simulation that are not material to the requirements, such as exact spelling, exact positioning of widgets (unless specified in the requirements), general styling such as fonts and colors (unless specified in the requirements), etc., will not impact your score.
- The number of points allocated to each exercise corresponds to the level of effort required to complete it. Look at these point allocations before you begin the exam, and budget your time accordingly.

Additional Resources

Additional resources are available to help you prepare for iRise certification exams. You can find information about iRise mentoring and instructor-led training on our web site at <http://www.irise.com/services/education>.

Many of our customers have found the following resources to be helpful as well.

Within iRise Studio:

- Access the iRise Help System from the Studio Help menu or by pressing F1 on your keyboard.
- Open and print the Quick Reference Guide from the Studio Help menu.
- Watch the Quick Start Videos or launch the Getting Started Tutorial from the Welcome Screen in Studio.
- Import and explore the Common Samples iDoc, which installs with Studio in the following location on your hard drive: \Program Files\iRise\Studio\iDoc_Samples\.
- Import and explore the SimBank sample project from the Welcome Screen in Studio.

Outside of Studio:

- Free self-paced e-learning is available at http://www.irise.com/services/training_elearning.
- The iRise Community (<http://community.irise.com>) is a lively, rapidly growing platform for engaging with other iRise users.

Contact Us

If you have any questions about iRise certification programs, please don't hesitate to contact us at education@irise.com.