

What is Informa Solutions University (ISU)?

Informa Solutions University (ISU) is an Informa educational entity that offers various certification programs available to Informa Investment Solutions (IIS) customers. Certification in an IIS product such as PSN Enterprise, Zephyr StyleADVISOR, or PerformanceIQ (formerly Investment Scorecard) indicates the certificate holder has the appropriate training and/or demonstrated proficiency in a given product and has demonstrated knowledge by passing a certification exam as designed and graded by an instructor of the university. Each certification program can have one or more levels of certification as outlined below:

Certification Programs Currently Available

PSN Enterprise Certification Program (2 Sections Required)

*Full day regional training courses are available to cover all sections. See "Prepare for Certification" below.

Introduction to PSN Enterprise

Certificate holder needs to demonstrate proficiency and understanding of:

- Different data modules and availability.
- Data and system updates frequency.
- System settings.
- Primary system features and functions.
- System navigation including:
 - How to generate firm and product data/narrative profiles.
 - How to create graph templates.
 - How to create batch reports.
 - How to create universes and custom subsets.
 - How to create performance driven reports and exporting to Excel.
 - How to create hypothetical portfolios and index blends.
 - How to create and upload proprietary data into PSN.

Expanding Knowledge of PSN Enterprise

Certificate holder needs to demonstrate proficiency and understanding of:

- How to apply primary features and functions.
- Incorporate case studies to reinforce meaningful usage. Case studies include:
 - Creating a graphic presentation.
 - Conducting a manager search and applying graphics for comparison analysis.
 - Conducting a hypothetical portfolio study and applying graphics for comparison analysis.
 - Creating a custom factsheet.
- Benefits of using primary features and functions.

Zephyr StyleADVISOR (4 Sections Required)

**Full day regional training courses are available to cover all sections. See "Prepare for Certification" below.*

Manager Analysis

Certificate holder needs to demonstrate proficiency and understanding of:

- Basic knowledge of the application.
- Building custom reports with the charts and tables you want.
- Changing colors of manager symbols and/or lines.
- Changing managers, benchmarks, style basis, peer groups, and cash equivalents.
- Management reports
 - How to generate firm and product data/narrative profiles.
 - How to create graph templates.
 - How to create universes and custom subsets.
 - How to create performance driven reports and exporting to Excel.
 - How to create hypothetical portfolios and index blends.
 - How to create and upload proprietary data into Zephyr StyleADVISOR.

Manager Search

Certificate holder needs to demonstrate proficiency and understanding of:

- Effectively navigating the Manager Search.
- The ability to screen managers on any combination of quantitative and qualitative investment criteria.
- Sorting managers in the search table.
- Exporting manager information.
- Running historical analysis after successfully screening managers.

Custom Data

Certificate holder needs to demonstrate proficiency and understanding of:

- Knowledge of custom files.
- Uploading performance.
- Building blends.
- Building universes.
- Building style bases.
- Building equally-weighted composites.

ReportVIEW / Dynamic Text

Certificate holder needs to demonstrate proficiency and understanding of:

- Basic knowledge of the ReportVIEW feature.
- Basic knowledge of Dynamic Text.
- Basic formatting.

PerformancelQ (formerly Investment Scorecard)

*Full day regional training courses are available to cover all sections. See *"Prepare for Certification"* below.

Core Functionality of PerformancelQ

Certificate holder needs to demonstrate proficiency and understanding of:

- Basic navigation within the site.
- User Profile Settings.
- Detailed portfolio allocation and performance data, including drill-down capabilities, changing dates and benchmarks, and accessing return research.
- Management reports:
 - How to use management reporting for a global view of all portfolios
 - Customization
- Presentation Center
- Change requests and issue resolution.

Advanced/Admin Functionality of PerformancelQ

Certificate holder needs to demonstrate proficiency and understanding of:

- Report Library.
- Asset Verification Reports.
- Activity Reports.
- User logins, entitlements, and assignments.
- Consolidated portfolios.
- Sample portfolios.
- Benchmark management at the institution and portfolio levels.
- Non-discretionary assets.
- Institution profile settings.

Prepare for Certification

If you're already a power user of PSN Enterprise, Zephyr StyleADVISOR or PerformancelQ (Scorecard), or perhaps you have received formal training in the past, you may be able to skip ahead and go through the testing process. For more information on how to get tested and certified, see *"Become Certified"* below.

Become Certified

You'll need to pass one or more tests per product certification of your choice. To request a product certification test, e-mail info@informais.com and indicate if you'd like the PSN Enterprise, Zephyr StyleADVISOR, or PerformancelQ (Scorecard) certification test.

Cost to Become Certified

Certification is available at no cost.

Benefit to Certified Recipients

- Confirmation of product knowledge and proficiency.
- Auto-invite Informa Solutions University LinkedIn web page and discussion group.
- Auto-invite future beta trial offer of certified product.
- Be the first group to participate in future product enhancement review.

Further Inquiry

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