

Course Description

This interactive, hands-on Report Grids and Charts course is split into two sections. The first part covers all concepts to understand the Analyze Page and creating new reports and charts, including pivots/grouping, aggregations, creating charts, and terminology.

The second part is to review specific reports or charts that will demonstrate how your usage data can help address relevant business problems.

Part 1: Building Report Grids and Charts – Revenue Analytics Demo Training Environment, 1h15

Analyze Page

- Using filters on the Analyze page
- Reviewing Loyalty
- Saving grids from the Analyze page

Report Configuration & Key Components

- Understanding relationships between pivots and columns
- Creating grids using multiple pivots
- When and why fields are aggregated
- Utilizing multiple grids for analysis

Building Charts

- Creating new charts in reports
- Using filters on charts

Key Field Terminology

- Demand
- Demand Trend
- Demand Change

Location

Training takes place online, using your own computer to access our WebEx session.

Duration

Classes may be scheduled in 1-hour to 3-hour time blocks, depending on topics covered

Class Size

Maximum of 10 learners per class for optimal time with our instructor and hands-on environment

Language

All classes are taught in English.

Scheduling

To schedule virtual training for your team, please contact your Engagement Manager.

Cancel/Reschedule

To cancel or reschedule a training, please notify your Engagement Manager 7 days prior to training.

Part 2: Revenue Analytics Reports – Customer Specific, 1h15

A pre-training conversation will take place to understand the customer needs and environment in regards to advanced reports and charts. We will discuss specific points that need to be addressed. The trainer and revenue analyst, will come up with a plan to cover each topic using specific customer reports.

- Walk through customer reports in their environment
- Understanding how reports will help you achieve your goals
- Exercises tailored to review pre-built customer reports

About ServiceSource

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