Revolutionizing Reporting for Beginner BI Users Learning Workshop

Dates: March 10 – 11, 2014
Time: March 10 - 9:00 a.m. to 5:00 p.m. | March 11 - 9:00 a.m. to 3:00 p.m.
Cost: $499 per person
Facilitator: Sarah Tuff and Ashia Coleman

Prerequisites

To attend this training, we ask that you meet the following criteria:

- Have completed iQmetrix Campus BI Launch training Course
- Have completed BI Level 1 and Level 2 Launch Training hosted by the BI Team
- Has a basic understanding of how Inventory, Commissions and Roles are handled within their organization

In this two-day workshop, we will dig into the core elements of the Cube Design, focusing on the areas that matter most. You will learn the foundational techniques needed to create reports related to Sales, Inventory, Operations, and Carrier Analytics.

Led by one of our BI Product Experts, you will:

- Learn the correct usage of the cube to produce key reports needed for Sales, Inventory and Operations teams.
- Work in a classroom, gaining best practice methodologies from both iQmetrix and fellow BI clients.
- Take part in a workable session producing reports in a step-by-step guided session.
- Leave with published, usable content you can go home and start using!

Security and Distribution Strategies

Start with a quick review of the setup steps covered in our Launch training. Work with us to complete a check-in, ensuring BI is configured correctly for your business. We will address who in the organization needs access. How should they gain access? And what do they need access to? If restricting access is needed (to one region or Group), this will also be addressed here.

Sales Reporting

Sales Reporting and reports for the sales team are often the number one priority when launching BI. Learn best practices for using the Sales Data in the Cube and get up to speed with creating sales reports for both employees and locations. We will review reports, including: Quantity, MTD Quantity, Targets and trending. If you have specific needs related to sales (for example – Primary Location reporting, including an employee ID Code, etc.) come ready to ask those questions here!

Inventory

After completing sales requirements, most dealers shift their BI focus to Inventory, more specifically: Forecasting tools which link together both On Hand and Sales data in one view. This session will provide a basic introduction on how RQ manages inventory using a ledger view of ins and outs. We will walk you through how that information is made available in BI and how you can use it in a meaningful way to achieve on-hand cost and quantity balances by location or product.

Operations

From Inventory, many dealers tend to focus on Audit-related reporting and creating tools to support the Ops teams. In this session, learn reporting techniques that will help put controls in place for both the sales transaction and the order of the phone. We will highlight some the most common requests, including: Refund reporting, Discount reporting, Coupons and the concept of creating a report to show you "Open" Items only.

Hands-on Development Time: Carrier Reporting

Please come to the training with an idea of the columns/rows of data your Main sales report contains. Have an Excel sheet mocked up and ready, showing how you'd ideally see this working for your sales team/company and a clear idea of who needs access to it. For example, you need a "View by Location" report and also a "View by Employee" report and these will be sent to all members of the team daily. What are the columns? Does it have targets?

Sign Up Now!

Limited seating is available. Please contact training@iQmetrix.com to save your seats today or for any questions! We look forward to seeing you!

- The iQmetrix Professional Services Team