

Kantata SX

Advanced Reporting Training Course Overview

Course Description

Kantata Advanced Reporting Training course is aimed at advanced Kantata users that are responsible for building or editing reports, such as System Administrators or Reporting SMEs. With a better understanding of the Kantata Data Model and using the range of reporting features, you can enhance the valuable insights from Kantata SX.

Course Goals

To educate Kantata customers, partners, and employees on the key reporting concepts of Kantata, and provide an understanding of the Kantata Data Model to enable you to manage and produce reports in an efficient and productive way.

Course Objectives

After completion of this program, you will be able to:

- Recognize how Kantata Objects are leveraged in reporting
- Identify the relationships and interdependencies between Objects
- Build Performance Analysis reports for revenue, forecasting, and usage
- Configure settings for calculating utilization and interpret utilization reporting
- Create an audit trail and leverage historical data trends
- Create custom metrics and reports

Prerequisites

- Prior experience or familiarity with the Kantata solution is required.
- It is recommended that participants have previously completed the Reporting Foundations course.
- Attendees should have a working knowledge of how Kantata supports the order to cash process typical of a professional services business.

- Salesforce reporting knowledge is beneficial but not required.

Course Format

In addition to the readings, resources, and demos, this course also includes hands-on exercises and activities, where you will be able to practice and apply what you have learned.

Content Overview

Performance Analysis Reporting

Students will learn about Performance Analysis in detail, and how facts and dimensions are leveraged in Kantata reporting. We will also explore how to build performance analysis reports for revenue, forecasting, and usage.

Objectives

At the completion of this course, students will be able to understand:

- Introduction to PA
- How Fields, Dimensions, and Facts Work Together
- Building Reports Based on PA

Utilization Reporting

Students will learn about how utilization is calculated, and review common utilization metrics and terminology. We will also review how to configure settings for calculating utilization, and how to interpret utilization reporting.

Objectives

At the completion of this course, students will be able to understand:

- How Utilization is Calculated
- Resource Periods
- How Resource Periods and Performance Analysis Support Utilization
- Utilization Reporting & Common Metrics

Historical Reporting

Students will receive an introduction to historic reporting techniques, and review how snapshots can be leveraged to capture data. We will also take a closer look at how to build an audit trail using Field History and Resource History.

Objectives

At the completion of this course, students will be able to understand:

- Field history tracking / audit trail
- Historical trend reporting
- Resource History
- Snapshot reports

Object Data Model

Students will learn about the Object Data Model, and how to leverage the Object Data Models to understand the relationships and interdependencies between Objects in reporting.

Objectives

At the completion of this course, students will be able to understand:

- Sales Data Model
- Delivery Data Model
- Resourcing Data Model
- Time & Expense Data Model
- Finance Data Model

Managing Your Business Metrics

Students will review how to leverage Targets and Groups to manage your business metrics.

Objectives

At the completion of this course, students will be able to understand:

- Advanced Formulas

- Targets
- Trend Analysis / Diagnostics
- Consistency & Forecast Accuracy