

Kantata SX

Reporting Foundations Training Course Overview

Course Description

Kantata Reporting Foundations Training is aimed at Kantata users that are new to reporting in Kantata SX, and have responsibility for reviewing, running, and interpreting reports. 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 you with tools and techniques to enable you to review and edit reports in an efficient and productive way. The course will cover the reporting options that are available out of the box, as well as basic to intermediate customization techniques to extend your own custom reports.

Course Objectives

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

- Understand the reporting & dashboard features in Kantata SX
- Navigate the Kantata Reports user interface (UI)
- Understand what standard 'out of the box' (OOTB) reporting content is available
- Perform edits to the OOTB reports to help answer business questions

Prerequisites

- Prior experience or familiarity with the Kantata solution is required.
- Attendees should have a working knowledge of how Kantata supports the order to cash process typical of a professional services business. Typically the following activities serve as sufficient prerequisites:
 - Attending the Kantata Foundations training activities during implementation

- Participation in the workshops, sprints, and/or UAT of an implementation project
- 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

Reporting Foundations

Students will be presented with training on reporting basics to navigate the reporting engine and run existing reports.

Objectives

At the completion of these modules, students will be able to understand:

- Kantata Reporting Framework
- Reporting Tool Overview
- Navigating and Running Reports

Report Types and Data Model

Students will learn about the Kantata Data Model at a high level and standard Kantata Reports that are provided out-of-the-box.

Objectives

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

- Predefined Reports Package
- Business Value of Reports
- Predefined Report Types
- Kantata SX Data Model

Customization Techniques

Students will be presented with training on basic to intermediate techniques to effectively build and customize your own reports.

Objectives

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

- Editing Report Filters and Fields
- Advanced Filter Logic
- Report Formats and Formatting Techniques
- Summary and Row-Level Formulas

Intermediate Topics

Students will learn more complex concepts around multi-currency reporting and creating dashboards. We will also introduce the concept of Performance Analysis and how to interpret more complex reports that are built using Performance Analysis.

Objectives

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

- Multicurrency Reporting
- Using Dashboards to Visualize Data
- Introduction to Performance Analysis