Preferred Strategies

BI & REPORTING SOLUTIONS FOR JD EDWARDS

Preferred Strategies
QuickLaunch Training Options

Overview

Preferred Strategies Professional Services team offers a range of training programs to help you learn our products operationally and maintain them from a technical perspective. The following provides information about our training course options and describes the curriculum for each course.

Who Should Attend our Training Courses?

Our courses are designed for the following operational roles.

- Business Analysts
- Financial Analysts
- Project Managers
- Program Managers
- Business Consultants
- Systems Administrators

Our hands-on courses and expert instructors will have you generating business impact with QuickLaunch and Power BI in no time!
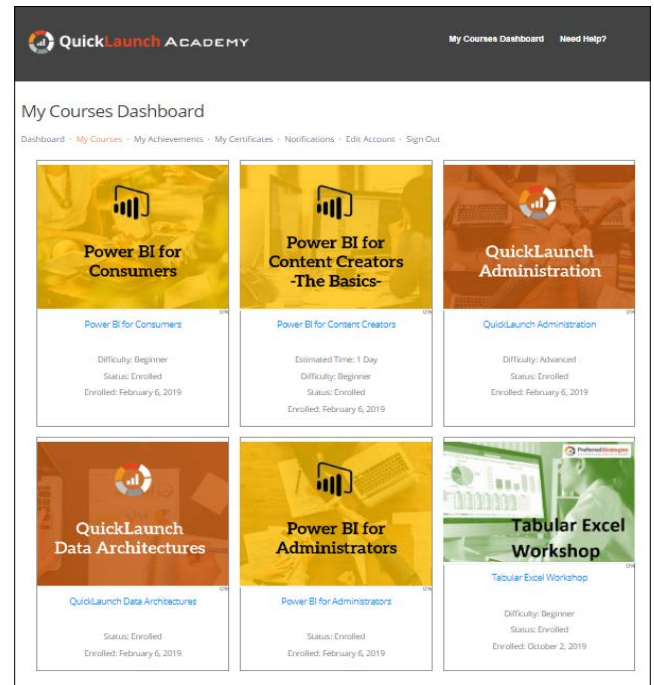
Training Your Way

We provide a range of training delivery options to match your style of learning and busy schedule.

Self-Paced Training

We provide dozens of tutorial videos on our support portal to help you get started and understand the basic operation of the Preferred Strategies QuickLaunch. Our self-paced format provides a wealth of information and fits your schedule.

QuickLaunch Academy is a great way to get new users up to speed quickly and making an impact on your organization through modern BI and analytics powered by QuickLaunch. Students will learn how to make Power BI dashboards in minutes. From finance to sales a picture tells a thousand words and the story telling impact of an interactive dashboard can make a dramatic difference to your organization and the

way it sees its business – step-by-step instructions on achieving these goals are just part of the value of QuickLaunch Academy membership.

QuickLaunch Academy courses are divided into two separate areas

1- General courses

We provide dozens of tutorial videos in QuickLaunch Academy to help you get started and understand the basic operation of QuickLaunch and Power BI. Check out the wealth of information available in a self-paced format here. Here are just a few of the courses currently available:

- Power BI for Creators – the Basics
- Power BI for Consumers
- Tabular Excel Workshop
- Power BI for Admins
- QuickLaunch Data Architectures
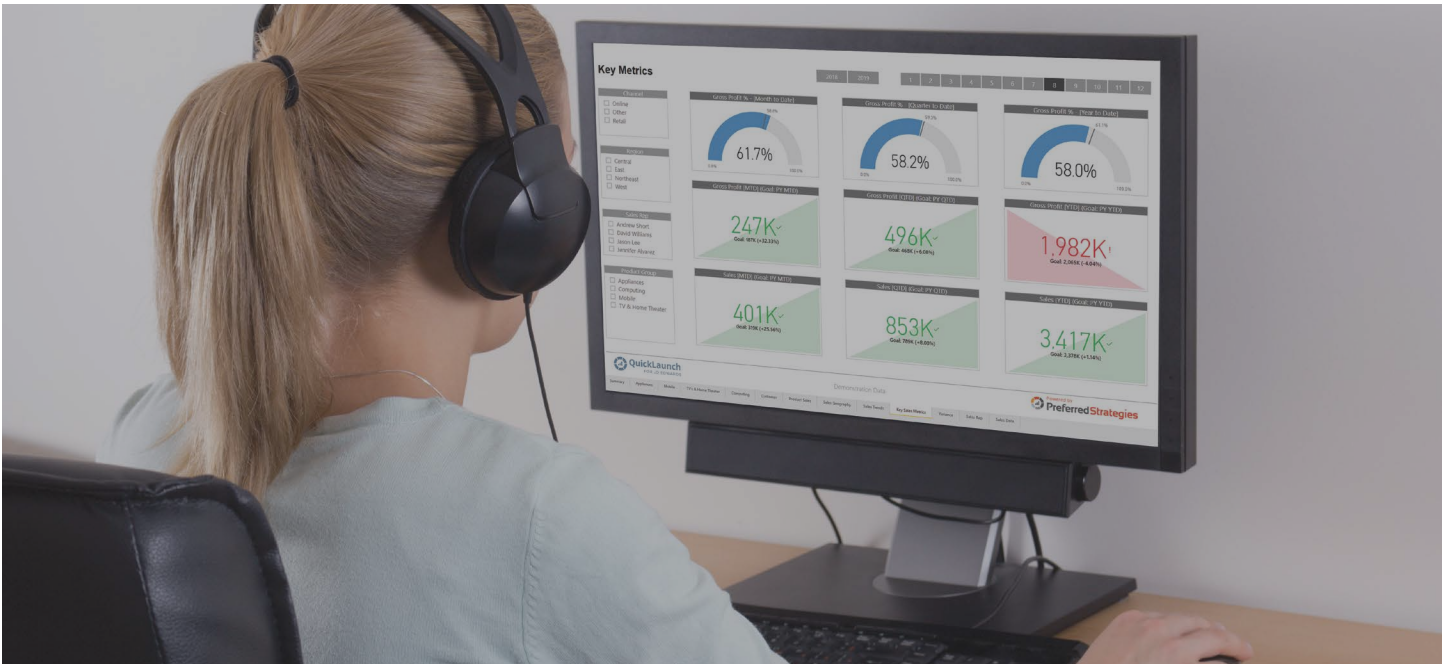- QuickLaunch for Administrators
- Much more

2- Your Own Company Tutorials

In addition to the general courses described above, which use generic data to illustrate the lessons, this second area is unique to your company and only accessible by you and your colleagues using your corporate email address. That's because this second set of tutorials use your data! These are recordings, captured during the implementation of your QuickLaunch environment, will help students understand how your data is mapped in Power BI and how to quickly navigate through your data to unlock the potential of modern BI and analytics in your own environment.

Workshops included with your QuickLaunch implementation

Title	Audience	Duration (Mins)
Tabular Excel Workshop	Tabular Model developers and Power BI developers	90
Tabular Admin Working Session	Tabular model administrators	60
Power BI Workshop	Key consumers and developers of Power BI	90
ODS and/or EDW Workshop	IT administrators who will manage the ODS/EDW	60

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Virtual Workshop – Maximize Class Size: 15

Four Days – Four Hours per Day

We recognize that sometimes it's easier to participate in training and be able to interact live with the instructor to get answers to your questions. Preferred Strategies employs a state-of-the-art virtual training environment to deliver the curricula to your team members wherever they are located. Shared screen training sessions and talk or chat feedback and regular Q&A sessions ensure that each student receives the attention they need during the learning process.

Our customer-centric virtual workshops use your own instance of QuickLaunch and therefore immediately adds value to the day-to-day tasks of the analysts that support your business. Each virtual workshop can accommodate up to 15 students. The workshops are recorded and edited then uploaded to your QuickLaunch Academy Private Classroom so that new employees and other team members can access the workshop at any time. Training courses are recorded and shared following class attendance.

Workshop Workbook and Study Guide

Each Workshop participant receives a unique Workbook and Study Guide to help them navigate the course. A printed copy of the workbook is provided to annotate and refer to at a later stage.

Complimentary Membership to QuickLaunch Academy

Each student who attends our Virtual Workshop will receive a complimentary, one-year membership to the QuickLaunch Academy.

On Site Delivery - Maximize Class Size: 15

Two Consecutive Days – Eight Hours per Day

Many customers have onsite training classrooms already established. This is ideal to maximize the QuickLaunch Workshop. Each user will access your own instance of QuickLaunch via a web browser on their own device. The classroom should be configured so the instructor can provide front-of-class tuition and also deliver 1:1 instruction throughout the course. Each curriculum has been designed with many breaks and hands-on assignments so that students can absorb the training and maximize their participation in the class.

Workshop Workbook and Study Guide

Each on site Workshop course participant receives a unique Workbook and Study Guide to help them navigate the course. A printed copy of the workbook is provided to annotate and refer to at a later stage.

Complimentary Membership to QuickLaunch Academy

Each student who attends our On Site Workshop will receive a complimentary one-year membership to the QuickLaunch Academy.

Virtual and On Site Workshop Curriculum - QuickLaunch for JD Edwards and Power BI for Designers

Session 1 – Introduction and Overviews

Part 1 – What is QuickLaunch? What is BI?

L1 - Meet the Presenter & Course Outline/Objectives

L2 - Intro to QuickLaunch for JD Edwards

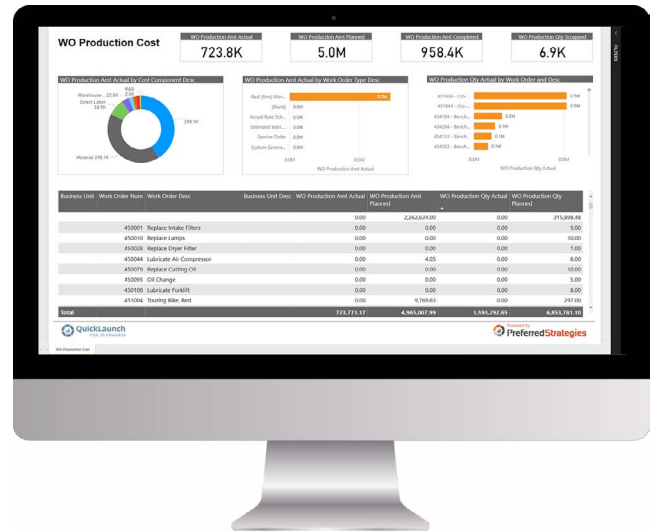L3 - Introduction to modern BI and Analytics

L4 - Overview of the Data Model – Dimensions, Facts, Measures, Calendars

Part 2 – Introduction to Microsoft Power BI

L1 - Overview of Power BI Solution Components

L2 - Power BI Architecture with QuickLaunch

L3 - Building Blocks of Power BI

L4 - Power BI Features/Functionality/Report Lifecycle Demonstration

Part 3 – Introduction to the Power BI Service

L1 – Signing into Power BI Service

L2 - Working with Application Workspaces

L3 – Download a Report

Part 4 – Getting Started with Power BI Desktop

L1 - Downloading and Installing Power BI Desktop

L2 - Meet the UI - Navigating Power BI Desktop

Session 2 – Creating Reports Part 1

Part 1 – Basics of Report Design in Power BI Desktop

L1 - Considerations before starting a report

L2 - Connecting to Data - Connect to PBI Datasets

L3 - Using Data Fields

L4 - Working with Data Tables and Time-Based Measures

L5 - Creating Basic Visualizations

L6 - Organizing Report and Adding Report Objects

L7 - Using Filters in Power BI

L8 - Filtering with Slicers

L9 - Visual Interactions in Power BI

L10 - Formatting Power BI Reports

Session 3 – Creating Reports Part 2

Part 1 – Building Your First Interactive Report

L1 - Reasons to Use a QuickLaunch Report Template for Power BI

L2 - How to Use a QuickLaunch Report Template

L3 - Copying and Pasting from One PBIX to Another

L4 - Working with Matrix

L5 - Working with xyz visuals

L6 - Formatting Power BI Reports

L7 - Adding a Drillthrough Page

L8 - Mobile Layout for Power BI Reports

L9 - Options in PBI Desktop

Session 4 – Sharing and Collaborating with Power BI Service

PBI Content Management Best Practices

Publishing Reports to Power BI Service

Working with App Workspaces

Working with Reports in PBI Service

Building a Dashboard in PBI Service

Creating/Updating PBI Apps