



NIMBLE AMS REPORTS & DASHBOARDS CLASS DESCRIPTION

Duration

2 Days – See **Schedule** section below for breakdown.

Class (Day One) starts promptly at 9:00 am. There will be a 15-minute morning break, an hour lunch break, and a 15-minute afternoon break each day. Class scheduled to end no later than 4:30 PM, but this may vary depending on questions and student projects.

Sessions conducted as part of a Choice Training package (non-Scheduled classes) recorded/distributed upon request. Scheduled classes NOT recorded. Class held virtually unless otherwise arranged.

NOTE: There will be an additional Three (3) Hours of Prep Time assigned to the total training hours assessed for this class for all Implementation (pre Go-Live) classes due to the setup of the Training orgs, development of report types, & agenda communications.

Schedule

Course schedule is composed of TWO distinct days of Training/Building:

Day One: Reports and Dashboards **Training** - Trainer uses client's **STAGING** org to conduct Reports & Dashboards class - see overview & following pages below for details. Content covers a detailed and interactive overview of the creation, building, and maintenance of Reports with additional, shorter overviews of the building/use of List Views and Dashboards. Class is designed to prepare Implementation clients (pre Go-Live) for their Go-Live and Choice (existing clients) to improve their use of Reports and Dashboards.

Day Two: Reports and Dashboards **Build** – Trainer conducts day long workshop in client's **PRODUCTION** org interacting with client representatives to build Reports and Dashboards that will be used post-Go-Live for Implementation clients, or post class for existing clients. This session will be lead by the instructor who will build desired reports and dashboards on the spot. Client departments will be provided with designated time periods to join trainer based off of a pre-determined agenda.

- Day Two can be broken down into increments as small as two hours over several days to accommodate multiple departments for a total of 6 total hours of class time.
- Additional Day Two Hours can be contracted beyond the 6 included hours
- Advanced Solutions/Discussions such as SOQL vs. SQL, Query Builder, Field Set manipulation, etc. are **NOT** included in this class but can be found topically in the Admin I or II Classes. This class will focus on implementing Stock Nimble AMS, End User level solutions

Implementation Clients

Due to the timing of this class for Implementation clients (pre Go-Live), it is advised that those clients divide the class into to separated days as designated below:

- DAY ONE should be scheduled approximately **2 weeks PRIOR to Go-Live.**
- DAY TWO should be scheduled **2 - 8 weeks AFTER Go-Live.**

Who Should Attend

This course is for individuals designated as Nimble SMEs for Reports and Dashboards and/or Administrator level users of the system. It CAN be held for the entire staff, but when determining attendance, clients should focus on inviting individuals that determine the content of the views and dashboards.

Nimble AMS Reports and Dashboards Training Manual included with attendance

DAY 1 REPORTS & DASHBOARDS TRAINING

Trainer will use the following agenda to instruct attendees in a daylong class around best practices in creating Nimble AMS List Views, Reports and Dashboards in the clients STAGING org.

Navigation (Optional) (30 min)

- Navigation, Terminology, & Hierarchy
- Finding Data
- Dashboards – Home & Application
- Favorites – Creating and Maintaining
- Settings – Logging In, Closing Tabs, Displaying Tabs, New Windows

List Views (45 min)

- Understanding List Views
- Using Existing List Views
- Creating a New List View
- Using Date Based and Prompted List Views
- Using List Views versus Reports

Reports (3 Hours)

- Understanding Reports
- Using Existing Reports
- Creating a New Report
- Using Date Based and Prompted Reports

Dashboards (45 Min)

- Understanding Dashboards
- Viewing and Copying Existing Dashboards
- Creating Effective Dashboards

Administrators (1 Hour)

- Sharing and Organizing List Views, Reports, and Dashboards (Folder Structure)
- Creating New Report Types
- Editing Existing Report Types
- Editing the Home Dashboard

DAY 2 REPORTS & DASHBOARDS BUILD

Client Departments scheduled increments (SEE MOCK AGENDA below) to follow along and provide input to instructor as they construct desired reports and dashboards. Can be an open-ended forum where users can drop in with requests, questions, and/or interactive builds.

The exact schedule/agenda for Day 2 will be determined in a pre-class meeting with the Trainer and the Client POC and distribute to client departments.

IMPORTANT NOTE: Reports will be built by instructor in client's PRODUCTION Org. It is required that clients have the necessary SMEs present, building, and/or contributing to the Trainer building the desired reports; there will need to be discussions on desired fields, filters, grouping, placement, folders, etc that can only be conducted in a face to face (or virtual) environment.

If chosen as a topic for Choice level training (not a Scheduled class), workshop level hours/days (Day 2) can be included at additional cost.

MOCK AGENDA FOR DAY 2 BUILD

Membership Department (9:00-10:30)

- Membership Views Build
- Membership Dashboards Build

BREAK (10:30-10:45)

Meetings (Events/Conferences/Webinars) Department (10:45-12:15)

- Meetings Views Build
- Meetings Dashboards Build

LUNCH (12:15-1:00)

Accounting Department (1:00-2:30)

- Accounting Views Build
- Accounting Dashboards Build

Government Relations Department (2:30-3:30)

- GR Views Build
- GR Dashboards Build

BREAK (2:30-2:45)

Executive (2:45-3:30)

- Executive Views Build
- Executive Dashboards Build

Committees Department (3:30-4:30)

- Committees Views Build
- Committees Dashboards Build