



Atlas Training Offerings Course Curriculum

Contents

User Training - Reporting	3
User Training - Uploading	5

User Training - Reporting



Course Code: ATL-SVC-TRN-UserReporting

Program Level: Basic

Field of Study: Specialized knowledge

Who should take this course?



This course is designed for users who will be designing, maintaining, and using Atlas reports using the Atlas Reporting Solution.

Learning Objectives



Upon successful completion of this course, you will have gone through:

- The features and capabilities of Atlas Reporting
- The functionality included in the standard "out of the box" product
- Designing and using Atlas reports
- Exploring key Tables, Entities, and Relationships
- Best Practices in Reporting and Cache Design

Agenda



Day 1

- Introduction
- Global Software & Atlas Architecture
 - Licensing types for Atlas users
 - Discuss how the components of Atlas work together
 - Discuss Atlas server administration at a high level
- Defining Datasources, Entities and Tables
 - Concepts of how different environments relate to Datasources in Atlas- such as Production, UAT, etc.
 - Concepts about where the data comes from (tables, entities, etc.).
 - Discuss an overview of table and entity relationships.
- Atlas Ribbon
 - All the Atlas functionality that is used via the Atlas Ribbon Bar
- Report Creation Options
 - All the options and ways we can create reports - from single cell formulas to structured table lists
- List Reports, Summary Reports, and Single Cell Formulas
 - Take a deeper look into the report types in Atlas

Course Details

Duration

- 2 days

Materials Provided

- Course guide

Pre-Requisites

- Basic knowledge of Microsoft Dynamics AX (specific to the version used with Atlas)

Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Course Credit

- CPE Credits: 7

Hands-on: 60%

Note: Training is conducted on the client's environment. It is important that the client's environment has been tested.

- Use an existing table Join
 - Use relationships between tables and entities that the Dynamics AX and D365 developers have enabled
- Lookup Example
 - Perform lookups in Atlas, to pick from data values (for example, Company)
- Style Options
 - How to use the style menu
- Snippets
 - How to store often used queries and report parts, so that they can be reused and shared
- Summary Report
 - This is similar to a List Report; however, it aggregates numeric fields

Day 2

- Calculation Columns
 - Column types that can be added to a tabular report, to perform various calculations
 - Manual Joins and Merges
 - To build table and entity relationships needed in reports
 - Using caches to speed performance
 - Caches in Atlas to provide in-memory and file-based data that can be used in reports, for efficiency and speed
 - For D365F&O, this topic is moved earlier to the Day 1 agenda.
 - Batches
 - Use of batches in reporting
 - Automation tool
 - The Automation Tool provides for automated report refreshing and formula adjustments for non-Atlas users. We will explore both aspects.
 - Best Practices
 - Best practices for optimization
 - Sharing reports with non-Atlas users
 - Exploration of the insightsoftware customer portal, and analysis of some templates
- ***Please note the agenda may slightly differ based on the Dynamics AX version used, for example D365 F&O versus AX 2012 (or 2009).***

User Training - Uploading



Course Code: ATL-SVC-TRN-UserUploading

Program Level: Intermediate

Field of Study: Specialized knowledge

Who should take this course?



This course is designed for users who will be designing, maintaining, and using Atlas Uploads using the Atlas Upload Solution.

Learning Objectives



Upon successful completion of this course, you will have gone through:

- The features and capabilities of uploads in Atlas
- The functionality for uploads that's included in the standard "out of the box" product
- Creating and using the different upload types
- Cautions when performing uploads
- Exploring the insightsoftware customer portal and analysis of some upload templates

Agenda



Day 1

- Introduction
- Atlas foundation
- Data sources
- Basic append
 - High level summary of append type upload
- Basic update
 - High level summary of update type upload
- Basic find and replace
 - High level summary of find and replace type upload
- Journal template analysis
 - Using Insight templates as a learning tool, explore and dissect some templates.
- Using Insight templates as a learning tool, explore and dissect some templates.
 - Other Template Type Analysis

Course Details

Duration

- 1 day

Materials Provided

- Course guide

Pre-Requisites

- Basic knowledge of Microsoft Dynamics AX (specific to the version used with Atlas)
- Successful completion of Atlas User Training - Reporting is recommended

Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Course Credit

- CPE Credits: 7

Hands-on: 60%

Note: Training is conducted on the client's environment. It is important that the client's environment has been tested.

- Exploration of Upload Field Mapping
 - Value
 - Incremental
 - Parent
 - Matrix
 - Child
 - Reference
 - Others as applicable
- Upload field options
- Batch uploads
 - Batch uploads, their features, design, and capabilities
- Batch splits
 - Splitting batch uploads by field values
- Performing uploads using the Automation Tool
- Errors
 - Diagnosing problems and errors, etc.

- ***Please note the agenda may slightly differ based on the Dynamics AX version used, for example D365 F&O versus AX 2012 (or 2009).***

Course Details

Duration

- Standard: Pre-recorded videos (One year subscription)
- Premium: Pre-recorded videos (One year subscription) with one 2-hour session
- Premium+: Pre-recorded videos (One year subscription) with two 2-hour sessions

Materials Provided

- Pre-recorded videos and course guide

Pre-Requisites

- None

Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Hands-on: 60%

Note: Training is conducted on the client's environment. It is important that the client's environment has been tested.