

# Training Webinar Series

## SmartPage & Business Intelligence Dashboards

The training webinar series for SmartPage & BI Dashboards is designed to give attendees a detailed understanding of the Smart Page application and in particular, the BI Dashboard functionality available within Smart Page. The series will include a basic overview of what Smart Page is and benefits of using it as well as a deep dive into creating and working with BI Dashboards. This is a 3-part series with each session lasting 2 hours.

*NOTE: The BI Dashboard functionality is based on developing SQL queries so a baseline understanding of the DELMIAworks database structure is highly recommended. Please ask about our 1-hour "Database Structure" workshop to learn more.*

### ➤ SmartPage Overview

- Advantages of using Smart Page
- Basic navigation
- Features: Module shortcuts, Reports menu, CRM tools, Pending Approvals, Smart Search
- Reporting: Gage metrics, KPI charts
- SmartPage dashboard organization

### ➤ BI Dashboard Introduction

- What is a BI Dashboard and how does it work?
  - Category organization
  - Security considerations
- Importing / Exporting dashboards
- Configuring dashboard layouts
- Creating new dashboards
  - Data selection: Query Designer, SQL, Parameters
  - Display options: Chart Designer

### ➤ BI Dashboard Intermediate

- Additional chart types: Heat Maps, Pie Charts
- Working with parameters
- Chart drill down functionality
- Example dashboard creation
  - RealTime dashboard
  - Financials dashboard

## Training Policy

Virtual training sessions are presented via GoToWebinar. Training will be on the trainer's data and there will be an opportunity for question and answer at the end of the session. Please contact our Training Department at 805-227-1122 Ext.4, or email [DELMIAworks.training@3ds.com](mailto:DELMIAworks.training@3ds.com) for course availability and pricing information.

**Customer Cancellation & Reschedule Policy**

- 49 hours or more, no charge
- 48 hours or less, 50% charge

*DELMIAWORKS reserves the right to cancel Virtual Training Classes due to lack of enrollment.*