



Fundamentals of Upland Analytics for PSA Virtual Training 2021

Course Overview

Fundamentals of Upland Analytics for PSA is an 8-hour course that will help users familiarize themselves with Upland Analytics, and how it can be used to assist them in their day to day business practices. The aim is to equip the user with the understanding and know-how to efficiently navigate and use the report builder. The course employs a practical strategy to tackle key concepts, including actual professional services business scenarios.

Upland PSA Fundamentals follows an active learning methodology by carrying out hands on exercises that encourage the participant's understanding of Upland PSA. This course will be given using a combination of lecture, demonstration and exercises.

Benefits:

This hands-on experience will allow you to gain an understanding of an easy approach to pulling data that you and your organization capture in Upland PSA to create a meaningful output facilitating the monitoring of progress, performance, and status of projects and entries, as well as financials and KPIs. You will acquire knowledge of how to create and manage reports utilizing this easy-to-use reporting tool. You will also receive an official Certificate of Completion at the end of the course.

Course Objectives:

- Navigating around Upland Analytics.
- Understanding the Features and Functionalities.
- Designing Tabular and Pivot Reports and Charts using the available fields as well as custom fields.
- Creating Dashboards and Drilldowns.
- Using the report settings to further customize the report, such as column configuration, data sorting and chart coloring.
- Configuring options including report scheduling, permissions, and on-page filters.

Delivery Method:

- All classes are delivered online

What's Needed to Attend:

Each participant will get access to a dedicated Learning Environment for completing class exercises. Participants need to have a laptop/computer, Internet and phone connection. Though optional, it's recommended to have another device to follow along.

Course Duration:

- 2-hour classes over 4 consecutive days for a total of 8 hours

Who Should Attend:

- PSA users needing to know how to design Upland Analytics Reports

Pre-Requisites:

- Preferably having basic experience with PSA in general

Registration:

- See **Pricing** below
- Jan 25-28 | [Register Here](#)
- Sep 7-10 | [Register Here](#)



Pricing:

2021 UPLAND PSA VIRTUAL TRAINING :: PRICING OPTIONS		EARLY-BIRD PRICING ENDS
EARLY-BIRD First Attendee 20% Off Standard Pricing	USD \$1,280	DECEMBER 18th Fundamentals of Upland Analytics :: Jan 25 th FEBRUARY 19th Fundamentals of OBS & WBS :: Mar 22 nd MARCH 19th Fundamentals of T&E + Billing :: Apr 19 th APRIL 9th Fundamentals of Resource Management :: May 10 th MAY 14th Fundamentals of Project Management :: Jun 14 th AUGUST 6th Fundamentals of Upland Analytics :: Sep 7 th SEPTEMBER 17th Fundamentals of OBS & WBS:: Oct 18 th NOVEMBER 5th Fundamentals of T&E + Billing :: Dec 6 th
EARLY-BIRD Second+ Attendee 15% Off First Early-Bird Attendee	USD \$1,088	
STANDARD First Attendee	USD \$1,600	
STANDARD Second+ Attendee 15% Off First Attendee	USD \$1,360	

Registration:

DATE at 9:30-11:30 AM EST 2:30-4:30 PM GMT/BST
Register at https://info.uplandsoftware.com/PSA-2021-WBN-Fundamentals-of-PSA-Registration.html
January 25th-28th, 2021
September 7th-10th, 2021