

# Fundamentals of Upland Analytics for PSS

Fundamentals for PowerSteering (PSS) is an 8-hour course [4 x 2-hour sessions] helps users familiarize themselves with Upland Analytics to assist in day to day business practices. To equip the user with the understanding and know-how to efficiently navigate the report builder, employing a practical strategy to tackle key concepts in Upland Analytics, including actual business scenarios.

Fundamentals of Upland Analytics for PSS follows an active learning methodology by carrying out exercises that encourage the participant's understanding. 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 captured in PowerSteering 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.

## 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, Internet and phone connection. It's recommended to have another device to view the course workbook.

## What you will learn

- 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.

## About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides eight enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.

## Who Should Attend?

All PowerSteering users are welcome

## Duration?

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

## Delivery?

All classes are delivered online

## Pre-Requisites?

Preferably having basic experience with PowerSteering in general

## Upland Analytics Course Dates

- February 24<sup>th</sup> – 27<sup>th</sup> - *Completed*
- April 14<sup>th</sup> – 17<sup>th</sup>
- September 21<sup>st</sup> – 24<sup>th</sup>
- November 9<sup>th</sup> – 12<sup>th</sup>