

# Custom training: Reporting

Take your SimpleLegal reporting knowledge beyond the basics with an expert-led deep-dive training series.

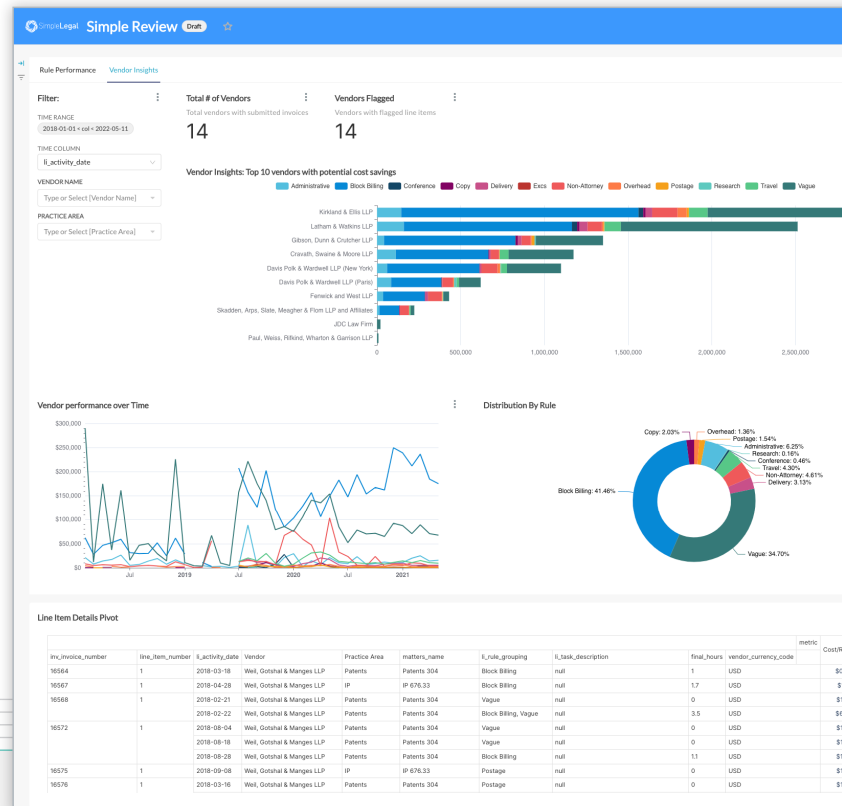
SimpleLegal offers a custom training program on reporting to help customers learn about functionality and how to gain the most value from their data in SimpleLegal.

## Program Details:

**5 sessions** Up to five one-hour sessions with one of our reporting experts

**5 Months** All sessions must be used within 5 months (no carryover)

**\$1,000** Total cost to you



## Training agenda

We understand that every department has a different level of reporting expertise and unique needs for training. The training agenda below was developed to cover the needs of most departments, but consider it a suggested agenda that can be tailored to focus on your specific needs.

### Session 1: The basics 101

Navigate and share existing reports

### Session 2: The basics 102

Cloning and customizing existing reports

### Session 3: Intermediate 201

Creating and designing new dashboards

### Session 4: Intermediate 202

Review and optimize your reports

### Session 5: Q&A Session

Make your reports better

## Session 1: The basics 101

By the end of this session, you'll understand how to navigate existing reports and share them with others in your organization.

- Metrics vs columns
- How to validate approach, data, and results
- Dataset overview
- Basic chart review
- Standard reports & interactive features review

## Session 2: The basics 102

In this session, we'll take a close look at cloning and customizing existing reports, as well as creating new charts.

- Customize standard reports
- Create new charts
- Access saved charts
- Clone an existing report
- Date/custom ranges

## Session 3: Intermediate 201

This session will cover creating brand new dashboards and how to design them to fit your needs.

- Building a dashboard from scratch
- Dashboard design basics

## Session 4: Intermediate 202

We'll review the reports you've created on your own and help you optimize their structure for better usability.

- Review the structure of your reports
- Use pivot tables

## Session 5: Q&A Session (optional)

In this session, we'll review your reports and provide pointers on how to make them even better! This is also a time to answer any last, remaining questions.

- Improve the reports you've built
- Solution workshop
- Q&A

## Get started now

To learn more or get started, please contact [success@simplelegal.com](mailto:success@simplelegal.com).

