

Certinia xRB Training: Part 2 – Advanced Techniques & Hidden Gems

Duration

- 2 Hours

Audience

- Intermediate Certinia xRB users who have completed Part 1 and practiced xRB report creation

Goal

- Deepen expertise in xRB's advanced capabilities and hidden features (Summer 2024+)

Prerequisites

- Completion of Part 1 - Introduction to Analytics & xRB Report Builder
- Minimum 1 week of hands-on practice with xRB
- Ability to navigate and edit lenses, filters, and report layouts
- Optional: Familiarity with JSON for exporting/importing report definitions
- xRB Version: Summer '24 or higher

Agenda

- **Welcome & Recap (10 min)**
 - Check-in and key learnings from Part 1
 - Poll or open Q&A on practice experience
- **Advanced Report Builder Techniques (40 min)**
 - Advanced lens cloning, soft date configuration
 - Subtotals, blank rows, and header formatting
 - Exporting/sharing (CSV, PDF, JSON)
- **Hidden Gems & Little-Known Features (30 min)**
 - Column freezing, merging/unmerging
 - Drag-and-drop row reordering
 - Suppressing calculations, formatting blank/measure rows
- **Real-Time Reporting Overview (20 min)**
 - Use cases, limitations, configuration
 - Show Menu and Refresh tools
- **End-User Power Tips (10 min)**
 - Dimension grouping, comment fields, report sorting rules
 - Best practices for layout, naming, scalability
- **Resources & Support (10 min)**
 - Advanced Certinia videos and docs
 - Community Group, Reporting Clinics, and Readiness Sessions