

# Training breakout sessions.

## Phocas 101

For everyday users looking to expand their use of Phocas and work smarter with data.

This session covers how to:

- customize your Phocas experience
- have the right data at hand to effectively sell
- use data to manage everyday business success
- understand your business performance across multiple data streams (i.e. sales vs budget).

## Phocas extras

Building on from Phocas 101, discover new features inside the latest version of the software.

This session covers how to:

- easily identify gaps and opportunities across your customer channels
- measure performance against key metrics
- build targeted customer lists
- create graphs and charts that represent key business levels.

## DB Designer

For technically-minded people who want to get more out of their Phocas solutions.

This session covers how to:

- get data into Phocas
- use the new extract, transform and load (ETL) tools
- make data work harder for your business
- build and modify databases
- manage and control access to databases.

## Administration

Navigate the administration section like a pro.

Learn how to:

- set up users
- lock in user restrictions
- create additional defined periods and more.

## Dashboards

Apply your Phocas knowledge and visualize data in a dashboard session.

Learn how to:

- tailor dashboards to your needs
- summarize an entire database in a single interface
- create an overarching view of your business that can be accessed anytime, anywhere.

## Lightning topics

For technically minded people wanting to optimize their Phocas environment.

This session covers:

- how to get your Phocas content to the right users and not overwhelm them in the process
- dashboard performance considerations and understanding how certain dashboard features/types/complexities can have a 'cost' against the limited available resources of a SQL server.

## Advanced search

Dive deeper into your data than ever before.

This session covers how to:

- identify your top 10 customers by any time-period
- find problem customers with decreasing spend
- get alerted when a product margins get too low.

## Custom mode

Customize the way you calculate, edit, or rearrange columns in the grid.

In this session learn how to:

- combine multiple data stream into one view displayed across your defined dimensions
- build a custom report to help track rep performance
- isolate products where stock holding is low.