Ethos Analytics Training Options

Maximize your Ethos Analytics investment with custom training using your team and your data packs

With our Custom Data Pack Workshops, dedicated FIS experts will work one-on-one with your team to provide customized, in-depth training and consultation with your Ethos Analytics data packs. You will leave this workshop with the tools and knowledge needed to start maximizing your investment right away, including a deep understanding of data models, executive dashboards, report building, meta data and how to query your data.

Set your team up for success with the Ethos Analytics Custom Data Pack Workshops. A few highlights of our Custom Workshops include:

- **User Group Site Training** – Learn how to navigate and leverage your data packs and other folders
- **Report Building Workshop** – Learn how to build the top 3-5 reports your business needs
- **Executive Dashboard Deep Dive and Consultation** – Deeper dive into the metrics, variable segmentations, various reports available, downloading a report, and more.
- **Meta Data Package Training** – Understand the data pack starter models and how to search for data fields in the data dictionary
- **On Call Assistance** – Dedicated assistance from our Professional Services and Subject Matter Experts for follow-up questions or training

FEATURES TABLE*	Standard Implementation and Training (Client Groups)	Custom Workshop Credit (1:1 w/client data) 12 hrs.	Custom Workshop Fraud or Loyalty (1:1 w/client data) 8 hrs.	Add on Data Pack (Credit) 8 hrs.	Add on Data Pack (Fraud or Loyalty) 4 hrs.	Additional Workshop Hours (4-hr Increments)
Site Administrator Training	✓	✓	✓			
Client User Group Setup	✓	✓	✓			
Basic Ethos Analytics Training	✓	✓	✓			
WeLearn Training Module	✓	✓	✓			
Engaging with Data Pack Models		✓	✓	✓	✓	
Executive Dashboard Deep Dive		✓	✓	✓	✓	✓
Meta Data Package		✓	✓	✓	✓	✓
Report Building Workshop		✓	✓	✓	✓	✓
Report Scheduling		✓	✓	✓	✓	
On-Call Assistance Post Training		✓	✓			

See feature descriptions on next page.

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FIS

FEATURE DESCRIPTIONS

Standard Implementation

Site Administrator Training – 2 hours (To be completed 1-week in advance of Basic Ethos Analytics Tool Training)

- Create personal folders for end-users
- How to open and save starter model template

Client User Group Setup

- Setup of User Groups
- Providing access rights to share with other users' created workbooks

Basic Ethos Analytics Tool Training – 6-8 hours (3 to 4 hours each day for 2 days)

- Review User Guide
- Review Meta Data package

WeLearn Training Module

- How to access and utilize the Ethos Analytics e-Training modules / videos (10-15 min each)

Custom Data Pack Workshop

All Standard Implementation features, plus…

Engaging with Data Pack Models

- Overview of User Group Site and deep dive into engaging your data packs and other folders

Executive Dashboard Deep Dive

- Deeper dive into the metrics, variable segmentations, various reports available, downloading a report, etc.

Meta Data Package

- Data Pack's Starter Models, review the Tables per each model, associated date dimensions preset for each model
- Data Dictionary - how to search for data fields
- Transaction Reason Codes for transaction filtering and reporting, posting date dimension as parameter
- Business Reference Materials / Block Reclass Codes, Auth Response & Decline Codes, VISA Fee Program, etc.

Report Building Workshop (Your business' top 3-5 reports)

- Tableau Workbook, "Publish As" to Personal Folder for Personal User Folder
- Define the Model's Filter requirements and date dimensions required for report
- Determine what "Create Calculated Data Fields" will be required
- Measures and Measure Names, how to use them for column reporting (Discreet vs Continuous)
- Analysis for Subtotals and Totals
- Renaming a data field (i.e., "Total New Bal" can be changed to "Account Balance")

Report Scheduling

- Scheduling Reports for Recurring Delivery

On-Call Assistance post Training – 4 Hours

- Dedicated assistance from our Professional Services and Subject Matter Experts for follow-up questions or training