

CDP Data Access

The Data Access service training teaches participants to use Solix CDP's reporting tool to query target data and generate custom reports or forms for compliance. You will master constructing queries at table and object levels while learning to use compound objects including views, tables, and materialized views. This equips you to seamlessly access migrated data across heterogeneous structures while strictly maintaining data integrity.

Recommended Audience

This course is designed for:

- Business Intelligence (BI) and Reporting Analysts
- Database Administrators (DBAs)
- Data Analysts and Data Engineers
- Application Support Engineers
- Compliance and Audit Professionals
- Data Governance Teams
- Technical Consultants implementing Solix CDP
- Business Users responsible for operational and compliance reporting
- IT Administrators managing archived or migrated data
- Solution Architects involved in enterprise data access strategies

Pre-Required Skills

Participants should have:

- Basic understanding of relational database concepts and database administration
- Familiarity with SQL and query writing for data retrieval
- Basic knowledge of database objects such as tables, views, and materialized views
- Understanding of data models and relationships between database objects
- Familiarity with reporting and business intelligence concepts
- Basic understanding of enterprise data governance and compliance requirements
- Experience with enterprise applications and their underlying data structures (recommended)
- General knowledge of data migration and archival concepts is beneficial but not mandatory

Course Highlights

- **Module 1: Overview** — Introduces the Solix Common Data Platform (CDP), its role-based access control model, and the key terms used across the Data Access service, setting the foundation for the rest of the course.
- **Module 2: Data Access Tools** — Covers the core toolset for querying archived data: Archive Reports (built via Query Builder or Configurator on tables, views, EBRs, or ETL configs), Archive Forms for guided data entry/lookup, and the SQL Editor for writing and running custom queries including saving, formatting, sorting, and downloading results.
- **Module 3: Accessing File Attachments Through File Policy Creation and Assignment** – Covers how OS-level file attachments (e.g. scanned invoices, purchase orders) from enterprise applications are archived to the target database by applying a

File Policy on configurations, tables, or columns so documents stay traceable to their archived data

- **Module 4: File Archiving Report** – Covers reporting on archived files stored in Solix Safe Archive, letting you verify what was archived, when, and confirm file-level archiving activity alongside the related data records.
- **Module 5: File Explorer** – Covers browsing archived file attachments through an intuitive folder-style interface, making it easy to locate and open specific documents linked to archived or migrated records.
- **Module 6: View Builder & Materialized Views** – Covers creating, saving, running, and downloading Views across knowledgebase objects, plus Materialized Views for building physical data subsets with fast refresh both used to simplify and speed up reporting on archived data.
- **Module 7: Meta Data Audit Reports** – Covers the difference between Service/Audit Reports (Data Access > Data Studio) and Metadata Reports (Operations > Settings > Metadata Management), used to track metadata changes, configuration activity, and support governance and compliance.

[Register Here](#)

Level: Advanced | Modules: 7 | Duration: 20 hours



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