­Analytics Project Documentation

*Would an analytics team member be able to use this document to know how to maintain/continue this work with minimal communication from the original analytics owner?*

# **Project Overview**

## Type

*The Ramsey Ed Self Study is a Tableau Dashboard in the Ramsey Ed -> Product folder* <https://us-east-1.online.tableau.com/#/site/ramseysolutions/views/RamseyEdSelf-Study-Watson/RamseyEdSelfStudy?:iid=1>

## Purpose

*This is used for tracking how well the Ramsey Ed homeschool self study products (high school, middle school, entre, and the bundle) are doing with revenue daily, along with a comparison of the performance prior to 4/12/20 (when the price was $19.99) and after this date (when it was raised to $29.99).*

## End Users

*Ramsey Ed leadership (Jim King, VP, and Jacqueline Garneau, Marketing) primarily use this. Any change/update should be run through Jacqueline.*

# **Analyst Specs**

## Data Source(s)

*Data is extracted from Ramsey Ed | Redshift | Self-Study tbl\_order\_summary on a daily basis on Tableau.*

## Source System(s)

*Data comes from AWS (table ramsey\_education.tbl\_order\_summary) which comes primarily from SalesForce and ServantQuote data*

## Technology SME(s)

*Andrew Knight set this up, but from IT, Scott Bradley would be the one to discuss with.*

# **Process/Maintenance**

## Maintenance

*There is no maintenance, the data runs daily in the morning to update, and this pulls in the updated order data from the previous day*

## Step by Step

*If you were to maintain it, you would need to download the workbook, edit the connection/filter, and reupload it*

## Important Callouts

*The workbook was mainly for a one time review of pricing and so is not actively maintained. Data is from 3/1/20 and on and only for those 4 products (Item No IN (‘ENT’, ‘HIGH’, ‘MIDDLE’, ‘BUNDLE’).*