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UNIT4
BUSINESS SOFTWARE

Course Catalogue
Agresso Business World

EMBRACING **CHANGE**

Welcome

Welcome to UNIT4 Training Services. We recognise that continuous learning is important for individuals and companies in order to succeed in a constantly changing environment.

The courses we deliver cover all aspects of our product modules, from introductory courses to more advanced support and reporting sessions.

This brochure contains details of courses currently being offered, in the form of course outlines. For each course there is:

- A brief description of the course
- A list of overall objectives
- Details of knowledge/courses required prior to attending the course
- Details of subsequent or related courses of interest.

Any mandatory knowledge/courses required prior to attending the must be met to ensure you get the most out of the course.

The courses have been designed to cater for different user audiences. To ensure that you attend the course suited to you, please see the section on 'The Course for me'.

At the back of the brochure there is a Practical Information page giving details of how to book a course, terms and conditions and location of the training centre.

In special cases, we can tailor our courses to suit your needs. Please contact us at the training centre to discuss this option further.

We hope you find a course that is of interest to you.

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Course Code List - cont.

Course Title	Course Booking Code
Award Management	
Award Management - Client	AAMCS01
Award Management - Self Service	AAMSS01
WebEx	
Flexi-Fields	ARTFX1
Document Archive	ARTDA1

Course Code List - cont.

Course Title	Course Booking Code
Reporting	
Enquiry, Browser and Analyzer	ACTX031
Balance Tables	AINAG7
Excelerator Basics	ACTEX1
Excelerator Advanced	ACTEX2
Agresso Report Creator	ACTARC1
Agresso Report Creator for Developers	ACTARC2
SQL for Report Writers	AINAG5
ARC Migration Workshop	ACTARC3
Agresso IntellAgent	ACTIA1
Sales and Distribution	
Accounts Receivable	AFICU1
Legal Debt Recovery	AUKLDR1
Sales Order Processing	ALOSO1
Inventory Management	ALOST1
Supporting Functions/Technical	
Agresso Security and Administration	AINAG1
Workflow Basics	ACTWF1
Database Housekeeping Workshop	DBAHKW
Data Import Basics	ACTDL1
Supporting Agresso	AINAG8
Technical Foundation	AINAG6
Field Force	
Service Centre	AFFSC1
Service Maintenance	AFFSM1

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The Course for me

Our customer courses are designed for different types of user audiences. This gives you the opportunity to take a course that is best suited for who you are within your organisation. Below we have described different kinds of users, just to make it easier for you to choose the right course for you.

Which type of user are you?

Enquiry User
This person is normally the one who asks questions, who analyses information and creates reports, on which decisions are based.

End User
This person is normally the one who enters and/or processes data.

Advanced User
This person has a detailed understanding of the business area or function area. This person is often a business analyst, or a managerial person, with an understanding of the complete picture from a financial or operational perspective.

Super User
This person has an understanding of the business, and the information systems used to support the business. This person is often part of the implementation team, and will be responsible for understanding how Agresso Business World works from a functional perspective.

IT User (Technical User)
This person is normally responsible for their organisation's technical environment, which might include software installation, database administration, writing reports. This person is often part of the implementation team, and will be responsible for understanding how Agresso Business World works from a technical perspective.

Course Code List

Course Title	Course Booking Code
Overviews	
Introduction to Agresso	ACTCR1
Financials	
Financials Basics	ACTCR2
Bank Reconciliation	AFICB1
Fixed Assets	AFIFA2
Planner	ACTPL1
Year End Routines	AFIGL4
Personnel and Payroll	
Introduction to ABW for HR/Payroll Users	AHRC1
Processing Payroll	AUKPR1
Implementing Payroll	AUKPR2
HR Enquiry, Browser & Analyzer	AHREB1
Year End Payroll	AUKPR4
HR Employee	AHRPS2
Work Schedule and Absence	AHRPA2
Travel Expenses	AHRTE1
Training Administration	AHRTA1
Pension Auto-enrolment	APAE1
Procurement	
Accounts Payable	AFISU1
Purchasing	ALOPO1
Project	
Project Basics	APRTS1
PCB Timesheet Processing	APRTS3
PCB Invoicing	APRTS2

Practical Information - cont.

Location

UNIT4 has Training Facilities in four locations. These are:

- **Eden House, Bristol**
  Eden House is approximately 5 miles from Bristol city centre. Eden House is easily accessible by road from the M5 and is approximately twenty five minutes by road from Bristol Temple Meads or Bristol Parkway stations.
- **Riverside House, Swansea**
  Riverside House is a few minutes walk from the Liberty Stadium.
- **Bridge House, Reading**
  Bridge House is a five minute walk from Reading station.
- **Cardale Park, Harrogate**
  Cardale Park is approximately a mile from the centre of Harrogate. Harrogate has a main railway link and is approximately 20 minutes by road from Leeds Bradford Airport.

Training Services

We are able to deliver a variety of training services, including standard and customised courses, according to your specific needs. Our services include:

- Formal classroom training
- Training Seminars
- Case Studies
- Training Needs Analysis
- Pre-UAT Training
- End User Training
- Floor Walking
- WebEx Training
- e-learning

Please contact us if this is of interest to you.

Evaluation

We are constantly developing our courses to maintain a high standard and therefore value your opinion. So at the end of each course we ask you to fill in an evaluation form and return it to us.

Training Options

Public Training

UNIT4 Training Services offer scheduled courses in a number of convenient locations around the UK. The courses are open to all customers with the software. They are ideal for delegates from organisations that either have no on-site training facility or who want to be able to train up a new member of staff on the system.

Scheduled courses allow delegates to meet and learn with Agresso Business World users from other companies and industries, thereby offering a broader understanding of the enterprise resource planning software environment.

Customer Training

All of our standard courses may be taught onsite using your facilities. A copy of our training database can be installed on your training system or access to a copy held at one of our Training Centres, can be made available through our remote connection software. Alternatively, you may prefer for us to host your training at one of our Training Centres.

UNIT4 Training Services are also able to provide your organisation with customised training using these options.

Course Offerings

1 Financials

2 Personnel & Payroll

3 Procurement

4 Project

5 Reporting

6 Sales & Distribution

7 Field Force

8 Technical & Supporting Functions

The courses we deliver cover all aspects of our product modules, from introductory courses to more advanced support and reporting sessions.

The courses should be taken along side consultancy in that module. There is no predefined sequence in which modules must be implemented, hence the sequence of the courses is restricted only by the prerequisites for the course.

The course offerings have been categorised within one of the boxes shown and the course outlines are contained in this catalogue with details of prerequisite courses and any subsequent/related courses that may be of interest.

An electronic version of this catalogue, detailing the course outlines, can be obtained from the website (www.unit4software.co.uk/services/training) or from any Training Services centres.

Practical Information

Booking Training Services

Training Services can be arranged for your organisation either on your site or at one of our training centres.

Alternatively, you can register for a scheduled course by fax, phone or email.
You can obtain a copy of the latest course schedule from either our web site or by requesting a copy from the Training Services Office.

In order to maximise the benefit from a course, the delegate should have met all the prerequisites detailed in the course outline before attending the course.

Confirmation

Invoices will be issued as acknowledgement of your order with payment due 30 days from date of invoice.

Cancellation

If you need to cancel your booking please contact us immediately.

Cancellations, from a scheduled course, with between 5 and 10 working days notice will be charged at 50% of the total price; cancellations made in less than 5 working days will be charged at 100%. Refunds will not be made. Please ensure you get the cancellation confirmed.

UNIT4 reserves the right to cancel or reschedule courses dependent on bookings accepted. In such circumstances, you will be offered alternative dates. We will not be liable for any loss or expense of the customer arising out of such a cancellation.

Course Catalogue Version

This is version 17 of the course catalogue.

Document Archive - WebEx

Duration
Half Day

Intended Audience
Super and Advanced User.

Prerequisites

Mandatory Course(s):	Workflow Basics
	IntellAgent
Mandatory Knowledge:	Familiarity with a Windows environment
	Familiarity with Agresso Attributes, Master Files, Action Overview, Browser and Agresso General Ledger

Overview
This course is design to complement the main classroom led training you will have received prior to joining this WebEx training session. As such, it is intended to provide you with an overview of Agresso document archive and explore some of the business uses for Agresso Business World users.

Overall Objectives
By the end of the course you will:

- develop an understanding of Agresso document archive and its interaction with other components of Agresso Business World
- demonstrate how to add a document to a GL Journal
- show how to connect documents to Master Files
- walkthrough registering customer/supplier invoices using items in the document archive
- connect documents to Action types
- demonstrate the use of document archive in Workflow
- see how document archive can be used in IntellAgent
- explore document archive in Agresso Self Service

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Flexi-fields - WebEx

Introduction to Agresso

Duration
1 Day

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory knowledge of a Windows environment.

Overview
This foundation course is designed to give an overview of the functionality of the main Agresso modules, and the interaction between them.

This course is mandatory for all new users of Agresso Business World.

Overall Objectives
By the end of the course you will:

- have obtained an overview of Agresso; the main Agresso modules and the interaction between them
- understand how Agresso performs its processing and reporting functions
- be familiar with the Agresso look and feel (menus, screens) and become comfortable navigating around the system
- understand the basic structure of Agresso
- understand process flow
- understand the basic enquiry and reporting capabilities of Agresso

Subsequent/Related Course(s) of Interest
After this course, you can attend additional courses related to individual Agresso modules to enable you to implement Agresso to support your specific business processes. For example, Agresso Financial Basics course will cover the structure of Agresso functional design in detail.

In addition, there are specific courses on reporting such as Enquiry, Browser and Analyzer.

Financial Basics

Duration
3 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to give you the basic knowledge about Agresso Common, the cornerstones of Agresso and how financial data is stored and reported.

The Agresso Common module holds the set-up data that is common to other Agresso modules; such as attributes, account rules, exchange rates and periods. The configuration of this data determines how enterprise data are stored and reported.

Overall Objectives
By the end of the course you will:

- understand how Agresso works with attributes, relations, exchange rates, and fixed registers
- have sufficient understanding so that as a Super User you can fully contribute to an implementation of Agresso, administer standing data on an existing Agresso system, and support other end users
- understand the scope of the Agresso General Ledger
- understand how you enter different types of journal and attach documents to transactions
- understand how to retrieve information from the Agresso General Ledger.

Subsequent/Related Course(s) of Interest
After this course, you can attend additional courses related to individual Agresso modules to enable you to implement Agresso to support your specific business processes.

In addition, there are specific courses on system administration that include:

- Agresso Security and Administration
- Agresso IntellAgent

Flexi-Fields - WebEx

Duration
Half Day

Intended Audience
Super, Advanced User and Staff who will be supporting the Agresso system.

Prerequisites
Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Agresso Attributes, Master Files and Browser

Overview
This course is design to complement the main classroom led training you will have received prior to joining this WebEx training session. As such, it is intended to provide you with an overview of Agresso Flexi-fields and explore some of the business uses for Agresso Business World users.

Overall Objectives
By the end of the course you will:

- develop an understanding of Agresso flexi-fields and its interaction with other components of Agresso Business World
- demonstrate how to add flexi-fields to the Customer Master File
- show how to connect flexi-fields to Attributes
- link flexi-fields to the Supplier Master File
- demonstrate the use of flexi-fields in Browser.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Document Archive - WebEx

Award Management - Self Service

Duration
2 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Award Management - Client
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to cover the facilities available to end users to manage research and other internal projects through their lifecycle.

The course is primarily aimed at Advanced and Super users involved in the roll out of Award Management – further courses can be designed on an individual basis to end users to focus on their specific needs as required.

Overall Objectives
By the end of the course you will:

- understand the how to define a project using the portal facilities available within Award Management
- understand how to progress a project through further stages in the project stage progression workflow, adding information as required to the project as dictated by the documents available at each stage.
- understand how to define and use enquiry templates for personal use, and how to use templates defined globally for use by everyone
- understand the different enquiry and report facilities available to end users in Award Management.
- understand how to enquiry on, manage and update project actions that are defined against projects.

Subsequent/Related Course(s) of Interest
There are currently no subsequent or related courses.

Bank Reconciliation

Duration
1 Day

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Agresso Financial Basics
Mandatory Knowledge: Familiarity with a Windows environment and the Agresso General Ledger

Overview
This is a training course that illustrates the initial set up of fixed registers for reconciling cashbook transactions to bank statements, and then details the functionality of the bank reconciliation process to help you understand Agresso Bank Reconciliation and fully utilise its potential.

Overall Objectives
By the end of the course you will:

- understand the flow of tasks for bank reconciliation in Agresso
- understand the set up of fixed registers to control the bank reconciliation process
- understand the mechanisms for importing bank statements into Agresso
- understand how you can manage the cashbook to manually adjust payments before matching transactions, or set the correct initial balance
- understand the different processes for matching transactions on bank statements to cashbook payments
- understand how to confirm a reconciliation in Agresso, and print a report of the reconciliation activity
- understand how you can correct matched transactions which have been confirmed
- understand the facilities which are available for enquiring on a bank reconciliation.

Subsequent/Related Course(s) of Interest
In addition, there are specific courses on reporting such as Enquiry, Browser and Analyzer.

Fixed Assets

Duration
2 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Agresso Financial Basics
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to give you an overview of how the Asset Transactions module works in Agresso Business World. The course covers: setting up the ledger, recording an asset, depreciation routines, and how to process the sale/ disposal of an asset.

Overall Objectives
By the end of the course you will:

- understand the basic structure of Fixed Assets and its interaction with other components of Agresso
- understand the accounting structure that is required for Fixed Assets and how this structure is set up
- understand the asset structure that is required for Fixed Assets and how this structure is set up
- understand how assets are registered in the Asset master file and how assets are capitalised
- understand how assets can be created from the posting of a supplier invoice
- understand the enquiries that can be performed on assets
- understand how assets are depreciated
- understand how assets can be adjusted using a variety of different options
- understand the reports that can be run on assets
- understand the year end processes that are run on assets.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Accounts Receivable; for the procedure of selling an asset
- Accounts Payable; for the procedure of buying new assets
- Purchasing; for purchase integration with fixed assets
- Reporting courses such as Enquiry, Browser and Analyzer

Award Management - Client

Duration
2 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to cover all the facilities available to system administrators to define the Award Management module to manage the lifecycle of a project and project data requirements.

The course also covers the facilities available to allow administrators to enter and enquire on project information.

Overall Objectives
By the end of the course you will:

- understand the structures employed in Award Management to progress a project through its lifecycle
- understand the general codes employed in Award Management, their purpose and how they are defined.
- understand how to define project types
- understand how project status codes, document types and how they are linked to build a project stage progression workflow.
- understand how access to projects and document types is managed within Award Management
- understand actions can be defined automatically during a project lifecycle to assist in the management of the project base, how responsibility for such actions is defined and how actions can be defined as alerts
- understand how to manage the organisation department structure and other static requirements
- understand how to define projects within Award Management
- understand the different enquiry and reporting facilities available within the module and how to define enquiry templates to facilitate such enquiries.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Award Management Self Service Course

Service Maintenance

Duration
2 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Project Basics, Inventory Management, Sales Orders and Purchasing

Mandatory Knowledge: A good understanding of the Agresso Logistics and Project solutions

Overview
The course has been designed to provide you with an in-depth understanding of the structure and set up of service maintenance in Field Force.

Overall Objectives
By the end of the course you will:

- understand Service Maintenance sufficiently to contribute to an implementation of Agresso Field Force as a Super User
- understand the basic structure of Field Force and how it integrates with the other Agresso modules
- understand how to set up and maintain the relevant Field Force fixed registers
- understand how to define and create Technical Structures to view the hierarchy of objects to be serviced
- understand the creation of Rounds in Preventative Maintenance
- understand the connection to Service Centre
- understand the enquiries and reports that can be produced about service requirements.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Service Centre

Planner

Duration
3 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Agresso Financial Basics
Balance Tables
Enquiry, Browser & Analyzer

Mandatory Knowledge: Familiarity with a Windows environment

Overview
The course outlines the basic concepts of Agresso Planner for preparing budgets, for use as a tool for budget modelling, and for storing budget data as transactions in an Agresso database.

Overall Objectives
By the end of the course you will:

- understand the scope and functionality of ABW Planner
- understand the integration with ABW Smart Client
- be able to set up the ABW system components to use Planner, including attributes, attributes values (and periods if required)
- be able to set up various fixed registers that are needed in order to use Planner
- be able to enter transactions for preparing budgets in Planner
- understand enhanced Planner functionality that provides you with additional tools for entry of transaction data and budget modelling
- understand the enquiry possibilities of Planner
- understanding how to configure Planner to perform top-down budgeting
- understand how to transfer budget data into a General Ledger balance table
- understanding how to import transaction into Planner
- understanding how to use forecasting tools within Planner
- to be able to use Planner in conjunction with Excelerator
- understanding how Workflow can be incorporated into Planner.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Agresso Security and Administration
- Excelerator Basics

Year End Routines

Duration
1 Day

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s):	Introduction to Agresso Agresso Financial Basics
Optional Course(s)	Balance Tables
Mandatory Knowledge:	Familiarity with a Windows environment

Overview
The course is designed to prepare for the Year End processing Routines.

Overall Objectives
By the end of the course you will:

- be able to prepare the system for a new accounting year
- have knowledge of all the period/year end reports and routines
- understand the methods for the transferral of opening balances
- understand how to move transactions to Historical General Ledger and Archive Files

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Balance Tables; for more information on how to create Balance Tables

Service Centre

Duration
3 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s):	Project Basics, Inventory Management, Sales Orders and Purchasing
Mandatory Knowledge:	A good understanding of the Agresso Logistics and Project solutions

Overview
The course has been designed to provide you with an in-depth understanding of the structure and set up of the service centre in Field Force.

Overall Objectives
By the end of the course you will:

- understand Service Centre sufficiently to contribute to an implementation of Agresso Field Force as a Super User
- understand the basic structure of Field Force and how it integrates with the other Agresso modules
- understand how to set up and maintain the relevant Field Force fixed registers
- understand the creation of Service Orders and the steps that it goes through in its lifespan
- understand the setup of Products and Purchase and Sales Pricing
- understand how to assign appropriate Resources to the Service Order
- understand the enquiries and reports that can be produced about service requirements.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Service Maintenance

Technical Foundation

Duration
1 Day

Intended Audience
Technical User.

The Agresso Technical Foundation is mandatory for IT staff who will be involved in installing and administering an Agresso Business World environment. It is suggested that at least two, and no more than four, delegates attend the course.

Prerequisites
All delegates should have a good knowledge of the appropriate Microsoft Windows operating systems and the appropriate RDBMS environment.

Overview
The Agresso Technical Foundation will provide the Agresso customer's technical staff with a working knowledge of the Agresso architecture, and the installation and management of Agresso within the following environments:

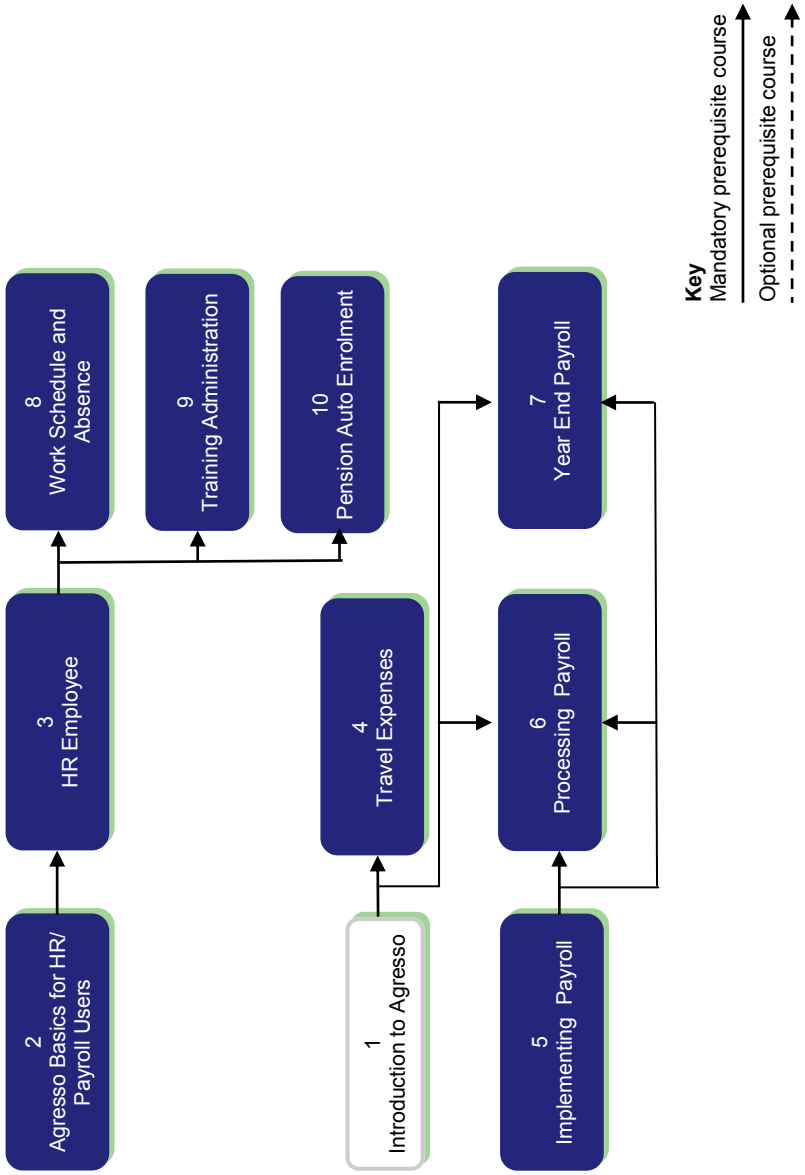
- Servers – Microsoft Windows Server 2003 servers
- Clients – Microsoft Windows xp, 2000 Professional and Vista
- Databases – Microsoft SQL Server 2005 and Oracle Database 10g

The course is not a substitute for formal technical training in Windows Server 2003, Microsoft SQL Server 2005 or Oracle Database 10g. The training will provide delegates with a good understanding of Agresso Business World and how it is configured and supported within the Windows Operating System and RDBMS environments.
The one day training will cover:

- Agresso Business World overview (architecture; environments; service accounts, folder structure and shared resources)
- Agresso Technical Guidelines (Agresso Server connectivity; Agresso Management Tools; Agresso Management Console Server service, queues and web services; Creation, deployment and testing of the Agresso Smart Client)
- Routine housekeeping and administration tasks (Agresso Management Console environment variables; Installing Agresso service packs and Agresso updates; Software Distribution Service; Configuring printers and email profiles; Licensing Agresso)
- Troubleshooting (Monitoring Agresso processes; Agresso log files; Agresso database tools)

Please note that this course is not accompanied by any printed documentation. Comprehensive Technical Guidelines are available electronically.

Courses for Personnel and Payroll



Introduction to ABW for HR/Payroll Users

Duration
1 Day

Intended Audience
HR and Payroll Super Users.

Prerequisites
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course outlines the basic concepts of Agresso and the operation of the Agresso software.

Overall Objectives
By the end of the course you will:

- understand the basic structure of Agresso and its interaction with other components of Agresso Business World
- understand the processing services that underpin Agresso
- understand the look and feel of Agresso menus and windows
- understand the four cornerstones of Agresso and their uses
- introduction to processes
- understand the power and flexibility provided by Agresso enquiry and reporting tools.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Enquiry/reporting courses such as Enquiry, Browser and Analyzer
- Courses for Agresso Human Resources Modules such as HR Employee
- Courses for UK Payroll such as Basic Payroll
- Courses for Agresso Financial Modules such as Accounts Payable
- Courses for Agresso Logistics Modules such as Purchasing

Supporting Agresso

Duration
1 Day

Intended Audience
Super User; Staff who will be supporting the Agresso System.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics

Mandatory Knowledge: Have knowledge of your organisation's requirements
Familiarity with a Windows environment

Overview
This course is designed to enable staff to fulfil a basic support function for their Agresso Office system but the course does not cover Self Service functionality. It covers:

- Agresso Management Tools
- Supporting Batch Input
- Supporting Balance Tables
- Useful Support Hints & Tips

Overall Objectives
By the end of the course you will:

- understand the Agresso services and job streams
- understand the dataflow within the key processes
- know how to support the Agresso application.

Subsequent/Related Course(s) of Interest
There are currently no subsequent or related courses.

Data Import Basics

Duration
1 Day

Intended Audience
Agresso super users, and for IT users who are responsible for maintaining financial and support functions in Agresso (for example a System Administrator), or other staff who are responsible for data import or interface operations.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics and/or HR Employee
Mandatory Knowledge: Familiarity with a Windows environment
Good working knowledge of Microsoft Excel

Overview
This course illustrates the initial set up of the data import tools that you use for importing transactions into Agresso, and then details the functionality of the data import process to help you understand and utilise its potential for importing transaction and master file data from an external source into Agresso.

Overall Objectives
By the end of the course you will:

- to fully understand the scope and uses of Agresso Data Import utilities
- to be able to set up the Agresso Data Import utilities within the Agresso environment
- to be able to use the Data Import utilities to import transactional and master file data to the Agresso database
- to be able to use the Data Import utilities to import data directly into Agresso data tables.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Agresso Security and Administration
- Excelerator Basics

Implementing Payroll

Duration
2 Days

Intended Audience
Super User.

Prerequisites
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to show you how to customise the Agresso Payroll to suit your organisation's needs. In particular you will learn how to set up the resource master file and payment and deduction codes to handle both statutory and company specific requirements.

Overall Objectives
By the end of the course you will:

- understand how the payroll can be customised to suit your organisation’s requirements
- be able to use the resource master file to meet your reporting needs
- be able to configure ABW to handle new payment and deductions
- design and configure your payslips.

Subsequent/Related Course(s) of Interest
You can attend additional training related to other individual ABW modules and tools to support your business processes.

The following courses may be of interest:

- HR Employee, Agresso Security and Administration, Accounts Payable, Processing Payroll, Year End Payroll
- Reporting courses such as HR Enquiry, Browser and Analyzer

Processing Payroll

Duration
2 Days

Intended Audience
Super, Advanced and End User.

Prerequisites
Mandatory Course(s): Introduction to ABW for HR/Payroll Users
Implementing Payroll

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with the payroll and financial requirements of your organisation

Overview
The course covers how to run the ABW UK Payroll processes, including how to set up new employees; generate pay proposals and payments; following its progress to posting in the General Ledger (GL).

Overall Objectives
By the end of the course you will:

- be able to add an attachment to earnings order
- process payments and BACS
- create pay adjustments
- run period end routines
- report on payroll data within ABW.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- HR Employee
- HR Enquiry, Browser and Analyzer
- Implementing Payroll
- Year End Payroll

Database Housekeeping Workshop

Duration
1 Day

Intended Audience
Technical User.

Prerequisites
All delegates should have a good knowledge of the appropriate Microsoft Windows operating systems and the appropriate RDBMS environment. This workshop is not a substitute for formal RDBMS training.

Overview
The Agresso Database Housekeeping workshop is intended for customers' IT staff who will be involved in installing and administering an Agresso database environment. This workshop is intended to provide customers IT Support Staff with an understanding of their own Agresso Business World environment and as such customers will need to take detailed notes.

Overall Objectives
This workshop will include:

- the SQL Server / Oracle architecture
- overview of the Agresso databases / instances
- Agresso database structures
- logical database layouts
- database security
- logical and physical backups
- ODBC / Net8
- physical database layouts
- indexes / Basic database tuning concepts
- tuning physical storage
- debugging Agresso database problems
- recovery scenarios.

Subsequent/Related Course(s) of Interest
There are currently no subsequent or related courses.

Workflow Basics

Duration
2 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Optional Course(s): IntellAgent
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to introduce the concept of workflow in Agresso, and illustrate how you can use workflow to map business processes and automate the flow of work activities and tasks.

Overall Objectives
By the end of the course you will:

- understand the concept of workflow and how you can use it in Agresso
- understand some of the practical applications of workflow
- understand how workflow operates in Agresso
- understand what you need to set up in Agresso before you can create a workflow
- understand how you create and configure a basic workflow in Agresso
- understand how you can integrate Agresso action management functionality with workflow to allow you to create workflows for automated management and distribution of tasks
- understand how you set up and configure advanced workflows for your particular business requirements
- understand Agresso facilities for creating, mapping, and maintaining workflows.

Subsequent/Related Course(s) of Interest
After this course, you can attend additional training related to individual Agresso modules to support your specific business processes.

Year End Payroll

Duration
1 Day

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Introduction to ABW for HR/Payroll Users
Processing Payroll
Mandatory Knowledge: Familiarity with a Windows environment
Understanding of statutory requirement for year end

Overview
This course will take you through the steps required in Agresso Payroll to run the UK Year End processes.

Overall Objectives
By the end of the course you will:

- be able to plan your payroll year end
- be able to update the system with new rates and balances
- be able to update tax information
- be able to produce end of year returns, including submitting an electronic return via the Government Gateway.

Subsequent/Related Course(s) of Interest
You can attend additional training related to other individual ABW modules and tools to support your business processes.

The following courses may be of interest:

- Implementing Payroll

HR Employee

Duration
3 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to ABW for HR/Payroll Users
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course illustrates the initial design and set up of resources, and then details the functionality of the resource system to help you understand the use of Agresso Human Resource and fully utilise its potential.

Overall Objectives
By the end of the course you will:

- understand the set up of the Agresso resource register
- understand how to set up and maintain resource information
- understand how to use relations on resources
- understand how to use standard reports and the browser to enquire on resource information
- understand Agresso Competences and their links to other Agresso modules
- understand how to perform a gap analysis
- understand how to enter applicant information, and transfer details of successful applicants to a resource record
- understand how to use the browser to enquire on applicant information.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Reporting courses such as Enquiry, Browser and Analyzer

Agresso Security & Administration

Duration
2 Days

Intended Audience
Super, Advanced User sand individuals with functional database administration responsibility.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics

Overview
The course has been designed to cover the basic skills required to carry out the non -technical administration of the Agresso software in a live environment such as user access, customising the process of ordering standard reports, clearing unwanted data, data control, use of personal menus and generating data warehouses.

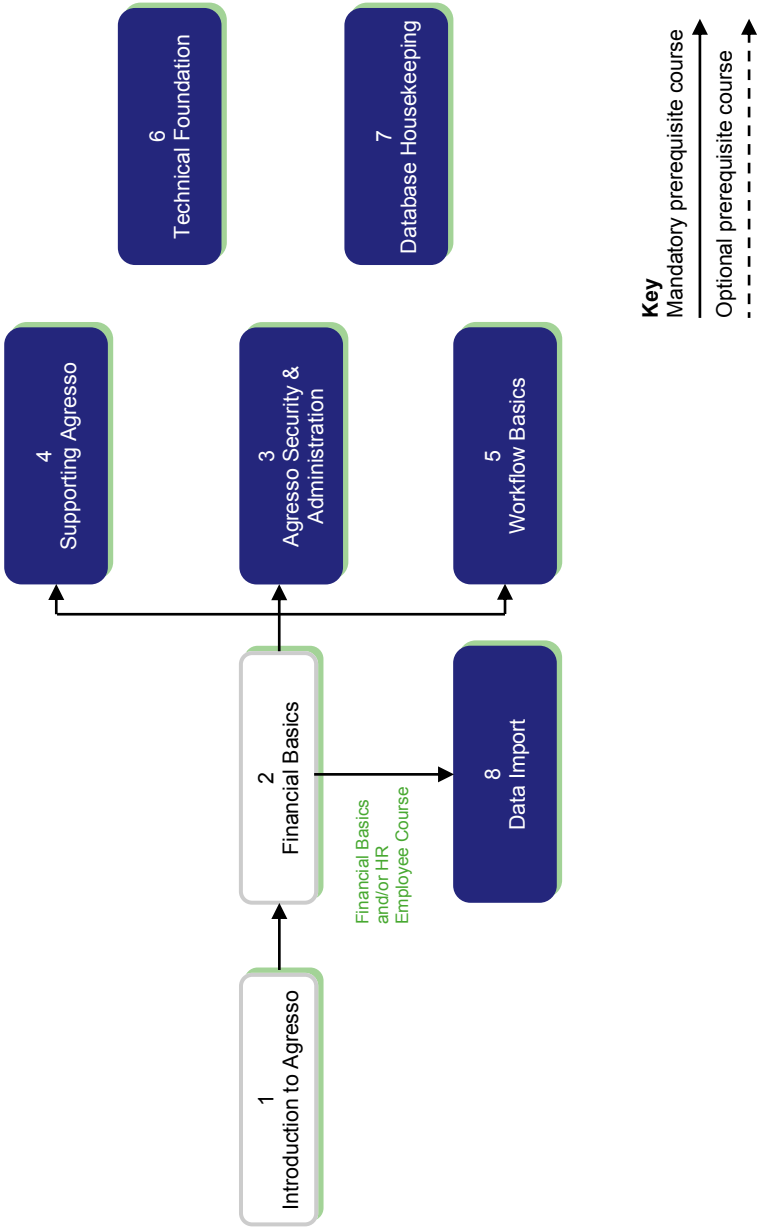
Overall Objectives
By the end of the course you will:

- understand the functions of the Agresso services
- understand the purpose of system parameters
- understand the scope and functionality of user access controls
- be able to add a new user, change user access, and remove access
- be able to monitor the progress of ordered reports
- be able to read and understand log files
- be able to schedule reports and apply printer or server filters by report or user
- be able to run data control type reports
- be able to personalise user preferences
- be able to maintain personal menus
- be able to run server processes to update Balance Tables and generate data warehouses
- be able to clear unwanted data
- be able to run reports to review data validation.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Agresso IntellAgent
- Balance Tables

Courses for Technical and Supporting Functions



Work Schedule and Absence

Duration
1 Day

Intended Audience

Super User.

Prerequisites

Mandatory Course(s):	Introduction to ABW for HR/Payroll Users
	HR Employee
Mandatory Knowledge:	Familiarity with a Windows environment

Overview

This course illustrates the set up and administration of the Absence Management Module, including how to enter absence details against a resource in Agresso Smart Client and Self Service and enquiry on absence entries.

Overall Objectives

By the end of the course you will:

- understand the basic structure of the Agresso Absence Management module and its interaction with other components of Agresso
- understand how to set up Personal Work Schedules and Holiday Plans
- understand how to link Personal Work Schedules to Resources and generate work schedules
- understand how to set up Absence Codes, Absence Groups and Relations
- understand how to set up Absence Limit Controls and produce limit reports
- understand how to enter absence details for a resource in Agresso Smart Client and Self Service
- understand how to run absence enquiries and produce reports.

Subsequent/Related Course(s) of Interest

The following courses may be of interest:

- Training Administration
- Reporting course such as Enquiry, Browser and Analyzer

Travel Expenses

Duration
1 Day

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course outlines the basic concepts for setting up Agresso Business World for travel expenses, and for using Agresso to enter and approve travel expenses.

Overall Objectives
By the end of the course you will:

- understand the scope and functionality of Agresso Expense Ledger for travel expenses
- be able to set-up the appropriate Agresso fixed registers which are required for travel expenses recording and posting
- be able to enter record and post travel expenses in Agresso
- understand how to perform enquiries on travel expenses
- understand how to run reports on travel expenses.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Enquiry, Browser and Analyzer
- Accounts Payable
- Workflow Basics

Inventory Management

Duration
1 Day

Intended Audience
Super and Advanced Users.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course explores how to enter goods into stock and withdraw them from stock as internal transactions. Purchase requisitions that are satisfied from stock are followed through the picking list and internal dispatch stages. Recording the movement of stock from one location to another is also covered. Stocktaking, with and without the use of barcode readers, and the valuation of stock and reconciliation to the General Ledger stock account is covered.

Overall Objectives
By the end of the course you will:

- have developed an understanding of the scope and functionality of Agresso Inventory Management and the interaction of it with other components of Agresso Business World
- have sufficient understanding to fully contribute to an implementation as a Super User, or manage standing data.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Purchasing
- Sales Order Processing

Sales Order Processing

Duration
2 Days

Intended Audience
Super and Advanced Users.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Optional Course(s): Inventory Management, if stocked products are sold
Accounts Receivable, desirable for a full understanding of how to set up customers, and how transactions are held on customer accounts
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course explores how to register customer orders: pick stocked goods from a warehouse, register the supply of products to customers, and how to print invoices. The course covers non-stocked and stocked items including products sold in batches, as serial numbered items and as kits of components.

Overall Objectives
By the end of the course you will:

- understand the basic structure of Agresso Sales Orders and its interaction with other components of Agresso Business World
- understand the structure of the product file and how to set up new products
- understand the structure of the customer file and how to set up new customers
- understand how to process basic sales invoices
- understand how to process credit notes against sales orders raised
- and optionally:
- understand how to process sales of stocked products
- understand how to process consolidated invoices
- understand how to process subscription or periodic invoices
- understand the pricing structure and how it applies to products.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Purchasing, for the generation of purchase requisitions through back-to-back sales orders
- Inventory Management; Accounts Receivable

Training Administration

Duration
1 Day

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Introduction to ABW for HR/Payroll Users
HR Employee
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course considers the initial design and set-up of the Agresso Training Administration module and its basic operation.

Overall Objectives
By the end of the course you will:

- understand the basic structure of the Agresso Training administration module and its interaction with other components of Agresso
- understand how to set up the Training administration fixed registers
- understand how to add and set up courses and course calendars
- understand how to add delegates to a course and show the completion (successful or otherwise) of the course
- understand the link with employee competences
- understand how to run enquiries and produce reports
- understand the training administration functionality available via Agresso Self Service.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Reporting course such as Enquiry, Browser and Analyzer

HR Enquiry, Browser & Analyzer

Duration
1 Day

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory Course(s): Introduction to ABW for HR/Payroll Users
Optional Course(s): HR Employee
Mandatory Knowledge: Familiarity with a Windows environment

Overview
All of the Agresso screen enquiry methods are explored. Text results are seen with simple enquiries, setup/configuration enquiries, standard balance table enquiries, and Browser enquiries. Graphical results are seen with Chart and with Analyzer. Note that although many enquiry results can be printed, this course does not cover reports that are intended to be printed.

Overall Objectives
By the end of the course you will:

- understand how to create new reports in HR and modify existing reports
- understand the scope and functionality of the enquiry methods available within ABW Business World
- understand how to manage reports within the Smart client and in self service
- understand the different ways that enquiry results can be displayed and manipulated.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Balance Tables
- Other reporting courses such as Excelerator Basics

Legal Debt Recovery

Duration
1 Day

Intended Audience
Super and Advanced Users; individuals with responsibility for creating or maintaining Legal Debt cases.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Agresso Accounts Receivable

Overview
This course will cover the basic skills required to carry out the administration of the legal processes required in the recovery of Customer outstanding invoices in a live environment.

Overall Objectives
By the end of the course you will:

- understand the functions of AGRESSO Legal Debt Recovery (LDR)
- understand the purpose of LDR
- understand the purpose of LDR system parameters
- be able to create and maintain Legal Debt Cases through to payment or Write off.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Agresso Financials Basics
- Accounts Receivable
- Reporting courses such as Enquiry, Browser & Analyzer

Accounts Receivable

Duration
2 Days

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Agresso General Ledger

Overview
This course will consider the initial design and set-up of the Agresso Accounts Receivable module. The course covers how to post customer invoices, produce customer invoices using the free text invoicing functionality and illustrates the tools that can be used to monitor and follow-up outstanding debts.

Overall Objectives
By the end of the course you will:

- understand the basic structure of the Agresso Accounts Receivable module and its interaction with other components of Agresso Business World
- understand how to set up the Accounts Receivable fixed registers
- understand the structure of the customer master file and how to set up new customers and amend existing customers
- understand how to create and post customer invoices into Agresso
- understand how to create an invoice for an existing or sundry customer
- understand how to follow up unpaid invoices including producing reminder letters and managing debt collection and write-offs
- understand how to record payments received for invoices
- understand the process of calculating interest due on late payments
- understand the process of setting up automatic payment methods including direct debits
- understand how to reverse transactions already posted
- understand how to run enquiries and produce reports.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Sales Order Processing
- Reporting courses such as Enquiry, Browser & Analyzer

Pension Auto Enrolment

Duration
1 Day

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory Course(s): Introduction to ABW for HR/Payroll Users.
HR Employee
Optional Course(s): Agresso Report Creator
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course will show delegates how to install, configure and maintain the Pension Auto Enrolment module. It covers details on how employees can be auto enrolled and the settings required for employees to opt-out of a pension scheme.

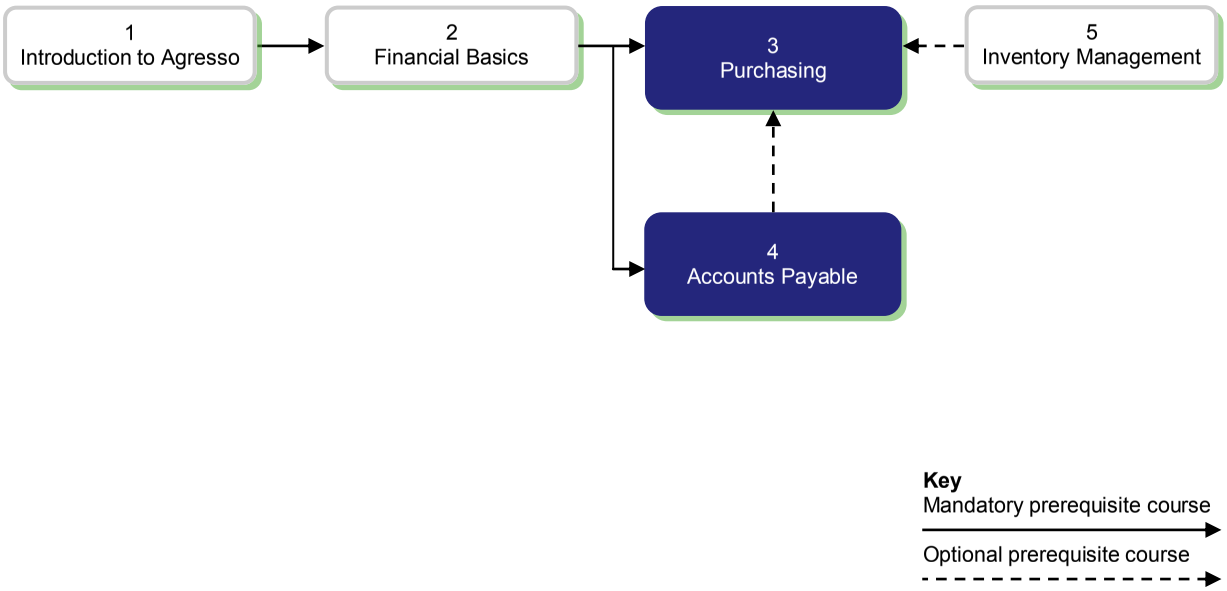
Overall Objectives
By the end of the course you will:

- Understanding the rules of auto enrolment
- Be able to explain the auto enrolment criteria
- Install and configure the auto enrolment module
- Set up the data needed within the auto enrolment module
- Demonstrate how to add a resource to a pension scheme and keep records
- Demonstrate the use of the standard pension enrolment letter pack
  NOTE: This course does not cover the formatting or amendment of these letters
- Run server processes related to auto enrolment

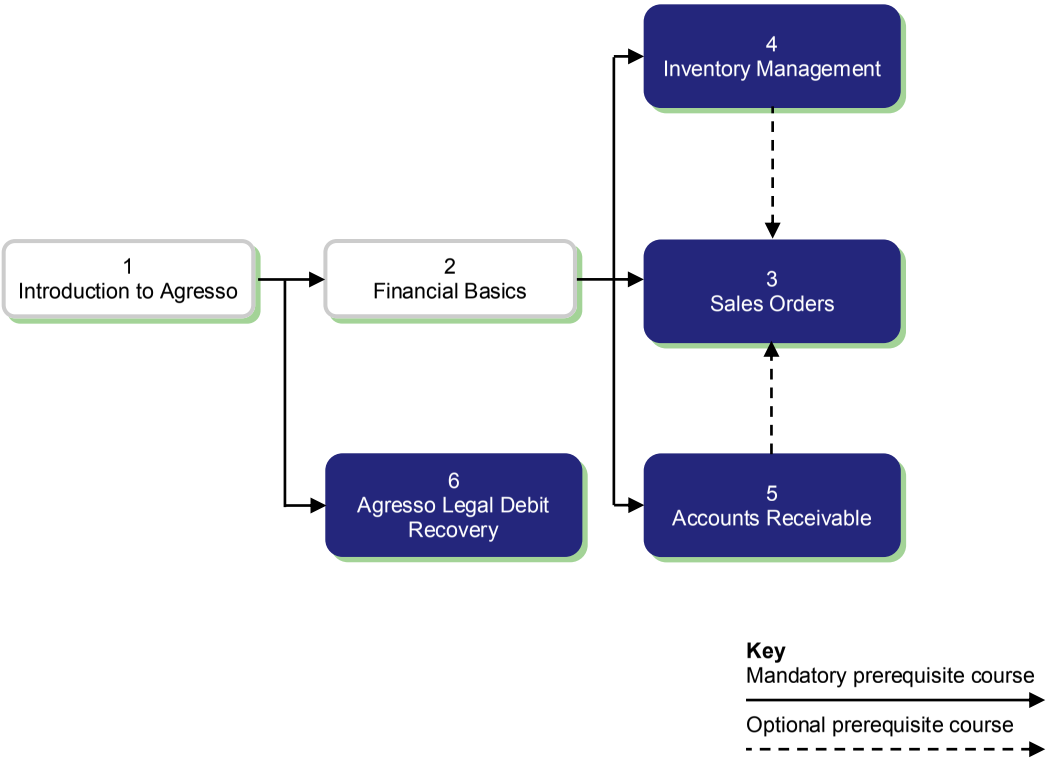
Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Agresso Report Creator
- Agresso Report Creator for Developers
- SQL for Report Writers

Courses for Procurement



Courses for Sales and Distribution



IntellAgent

Duration
1 Day

Intended Audience
Super User and Staff who will be supporting the Agresso system.

Prerequisites
Mandatory Course(s): Introduction to Agresso

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with the installation of Agresso
It is assumed that attendees will be comfortable using email.

The course will cover obtaining information from various modules via browser and sql queries. It will also look to process data through the GL07 (transaction processing) and CS15 (Customer and Supplier load) programs. Therefore a good all round understanding of the Agresso system is desirable. An understanding of basic sql concepts is required but detailed knowledge of the syntax is not required.

Overview
This course is designed to show you how to use the basic functions of IntellAgent to send reminders or prompt for specific events.

Overall Objectives
By the end of the course you will:

- understand the basic features of IntellAgent and its interaction with other components of Agresso Business World
- understand the types of event that can be used with IntellAgent
- understand how to create simple events
- understand the different types of advanced events and how they can be used
- understand how to create advanced events
- understand how to maintain an event once it has been created
- understand how to run enquiries on current events set up in IntellAgent
- understand how to run enquiries on historical events recorded in IntellAgent.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- SQL for Report Writers
- Enquiry, Browser and Analyzer

Accounts Payable

Duration
2 Days

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Agresso General Ledger

Overview
This course will consider the initial design and set-up of the Agresso Accounts Payable module.

Overall Objectives
By the end of the course you will:

- understand the basic structure of the Agresso Accounts Payable module and its interaction with other components of Agresso Business World
- understand how to set up the Accounts Payable fixed registers
- understand the structure of the supplier master file and how to set up new suppliers and amend existing suppliers
- understand how to set up document archive to attach electronic invoice images to supplier invoice transactions
- understand how to register and post supplier invoices into Agresso
- understand how to maintain open items
- understand the process of making manual payments, and matching them to invoices
- understand the processing of remittance proposals
- understand the processing of payments
- understand how to reverse transactions already posted
- understand how to run enquiries and produce reports.

Subsequent/Related Course(s) of Interest
Purchasing may be relevant if Logistics Purchasing is to be used to request goods and services, order them, receive them, and match the resulting supplier invoices against the purchase orders. In addition, there are specific courses on reporting such as Enquiry, Browser & Analyzer.

Purchasing

Duration
3 Days

Intended Audience
Super and Advanced User.

Prerequisites

Mandatory Course(s):	Introduction to Agresso Financial Basics
Optional Course(s):	Inventory Management, if stocked products are to be purchased Accounts Payable
Mandatory Knowledge:	Familiarity with a Windows environment Familiarity with Agresso General Ledger

Overview
This course explores how to request goods and services, order them, receive them, and match the resulting supplier invoices against the purchase orders. The course covers non-stocked and stocked items including products bought in batches and as serial numbered items.

Overall Objectives
By the end of the course you will:

- understand the basic structure of the Agresso Purchase Orders and its interaction with other components of Agresso Business World
- understand the structure of the product file and how to set up new products
- understand the setup for requisitioning and Agresso Self Service to enable purchase orders to be processed
- understand how to raise a requisition and purchase orders for services and products
- understand how goods ordered are received and processed
- understand how internal purchase orders are raised and processed.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Sales Orders, for the generation of purchase requisitions through back-to-back purchase orders
- Reporting courses, such as Enquiry, Browser and Analyzer.

ARC Migration Workshop

Duration
1 Day

Intended Audience
Super, Advanced and Enquiry User.

Prerequisites

Mandatory Course(s):	Introduction to Agresso Agresso Financial Basics (or familiarity with the Agresso concepts: Attributes, Relations, Account Rules, Balance tables and Server processes) Enquiry, Browser and Analyzer, Agresso Report Creator, SQL for Report Writers, ARC for Developers
Mandatory Knowledge:	Familiarity with a Windows environment Familiarity with Agresso client user interface

Overview
This course is designed to show you how to take an existing Crystal Report Writer (CRW) definition and consider the steps needed to migrate this to an ARC report. It looks at which points to evaluate when deciding how to migrate your reports.

In the afternoon there will be an opportunity for you to start to migrate your own reports. Please bring one or two reports for that purpose – it is not intended that you will finish these reports, but that you have the opportunity to start one or two with advice from the course trainer.

- BE AWARE if you bring a report from 5.4 from an area where the functionality has changed in 5.5, you may spend most of your time sorting out the query. This may be particularly true for po01, cu09b and so13f2
- Please do not expect to finish these reports – just to start them in a helpful environment. The course is scheduled to finish at 4pm, to allow time to save reports, complete feedback, etc.

Your knowledge of the CRW report will aid the migration process.

Overall Objectives
By the end of the course you will:

- understand the basic steps needed to migrate a report
- have practical application of those steps
- have migrated (partially or fully) one or two of your own reports
- take away a migration tool to further aid you.

SQL for Report Writers

Duration
3 Days

Intended Audience
Super and IT User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Agresso Financial Basics (or familiarity with the Agresso concepts: Attributes, Relations, Account Rules, Balance tables and Server processes)
Enquiry, Browser & Analyzer
Excelerator Basics and/or Agresso Report Creator

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Agresso client user interface

Overview
This course covers the use of Structured Query Language (SQL) in Agresso with particular emphasis on the writing of reports in either Agresso Excelerator or Agresso Report Creator/Crystal. The course has been designed to cover the foundation skills required to create custom reports in Agresso. The term "foundation skills" is used to cover those areas of knowledge that any writer of reports requires regardless of which reporting tool is being used.

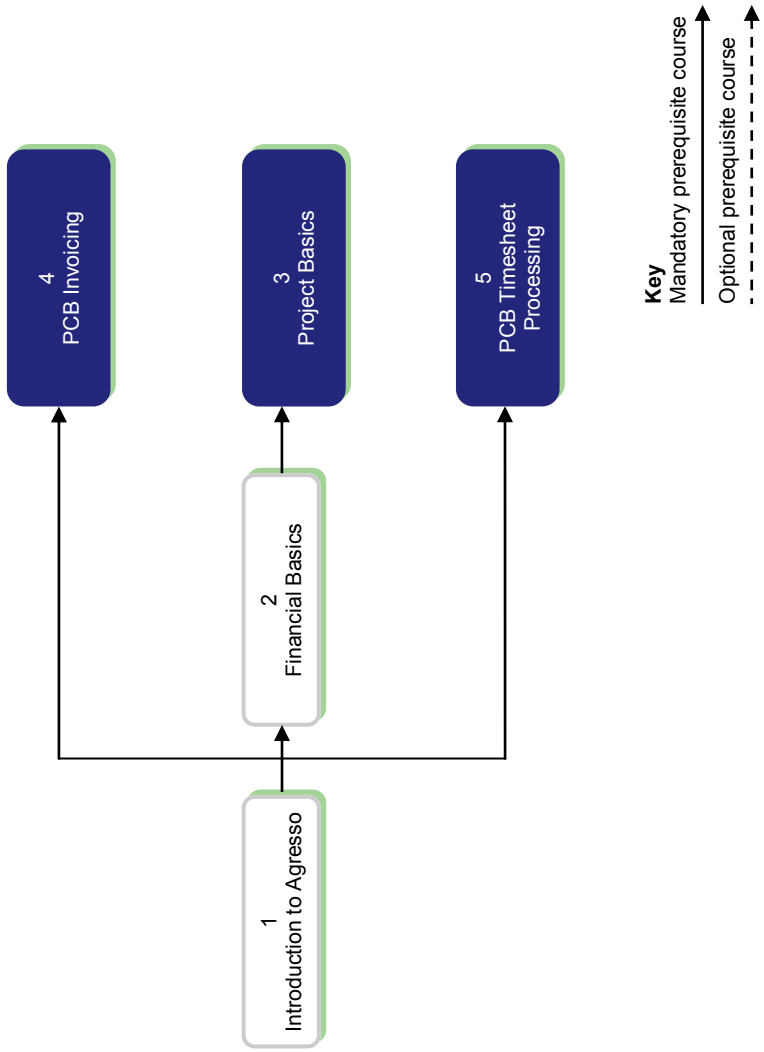
Overall Objectives
By the end of the course you will:

- understand the main concepts of Structured Query Language (SQL)
- be able to write SQL queries using balance tables and other Agresso tables
- understand why creating temporary tables may produce faster running reports
- understand how to create temporary tables and link them to your reports

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Other reporting courses such as Excelerator Advanced
- Balance Tables

Courses for Project



Project Basics

Duration
1 Day

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course has been designed to provide you with an in-depth understanding of the structure, workflow and setup of Agresso Project Costing and Billing (PCB).

Overall Objectives
By the end of the course you will:

- understand PCB sufficiently to contribute to an implementation of Agresso Project Costing and Billing as a Super User
- understand the basic structure and workflow of Agresso Project Costing and Billing
- understand how to set up and maintain the relevant PCB fixed registers
- understand the structure of the project master file and how to enter the details about new project
- understand the structure of the work order master file and how to enter the details about new work orders associated with projects
- understand how to set up and maintain draft projects
- understand how to set up and maintain project budgets
- understand the enquiries and reports that can be produced about projects.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- PCB Timesheet Processing
- PCB Invoicing
- Reporting courses such as Enquiry, Browser and Analyzer

ARC for Developers

Duration
2 Days

Intended Audience
Super, Advanced and Enquiry User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Agresso Financial Basics (or familiarity with the Agresso concepts: Attributes, Relations, Account Rules, Balance tables and Server processes)
Enquiry, Browser & Analyzer
Agresso Report Creator
SQL for Report Writers
Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with the installation of Agresso
Familiarity with Visual Basic, including VBA (Office macros), VB Script, VB
Have written some reports using Agresso Report Creator

Overview
This course has been designed for report developers and is most relevant to those who have already had experience of building reports in Agresso Report Creator (ARC) and other Agresso tools.

Overall Objectives
By the end of the course you will:

- be familiar with direct connect reports
- know the order of events in an ARC report
- know how to use conditional statements and expressions
- be familiar with several multiple SELECT statements
- be able to control canvases
- be comfortable with simple sub-reports.

Subsequent/Related Course(s) of Interest
There are currently no subsequent or related courses.

Agresso Report Creator

Duration
2 Days

Intended Audience
Super and IT User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Agresso Financial Basics (or familiarity with the Agresso concepts: Attributes, Relations, Account Rules, Balance tables and Server processes)
Enquiry, Browser & Analyzer

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with the installation of Agresso
Familiarity with Visual Basic, including VBA (Office macros), VB Script, VB

Overview
This course is designed to show you the how to use and integrate Agresso Report Creator reports. The course covers creating new reports as menu items within Agresso Business World, and replacing or modifying existing reports.

Overall Objectives
By the end of the course you will:

- understand the basic features of Agresso Report Creator and its interaction of it with other components of Agresso Business World
- understand how to run Agresso reports using Agresso Report Creator
- understand the processes involved in creating an Agresso Report Creator report
- understand how to amend a template report
- understand the features available to enhance simple reports to expand report content
- understand the setup and configuration of Agresso Report Creator to enable it to be tailored
- understand Agresso Report Creator sufficiently to contribute to an implementation as a Super User or support to Enquiry Users, as a report-writer or designer for standard reports.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Other reporting courses such as SQL for Report Writers

PCB Timesheet Processing

Duration
2 Days

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This is a training course that has been designed to provide you with an in-depth understanding of how you register, amend, post and follow up time transactions in the Agresso Project Costing and Billing (PCB) module.

Overall Objectives
By the end of the course you will:

- Understand the dataflow of time transactions Agresso PCB from timesheet entry to posting in Agresso General Ledger
- Understand the basics of time costs
- Be able to enter, amend and reverse timesheets on all levels
- Be able to post time costs in Agresso General Ledger
- Be able to do enquiries and follow up on time transactions on all levels in Agresso Smart Client.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- PCB Invoicing
- Project Basics
- Reporting courses such as Enquiry, Browser and Analyzer

PCB Invoicing

Duration
1 Day

Intended Audience
End User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This is a training course that has been designed to provide you with an in-depth understanding of how you generate and process invoices for projects, part of the Agresso Project Costing and Billing (PCB) module.

Overall Objectives
By the end of the course you will:

- understand the basic structure and workflow to produce project invoices
- understand how to set up Agresso and Agresso Self Service ready for entering and processing invoices
- understand how to set up PCB ready for entering and processing invoices
- understand how to maintain project pricelists and invoice rules
- understand how to invoice ACE, Hours, Fixed prices and Expenses
- understand how to maintain and amend the Invoice Base and Invoice Proposal
- understand how to recalculate prices and credit invoices
- understand how to follow up on income items in the different steps of the invoicing process
- understand the enquiries that are available about project invoices.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Project Basics
- PCB Timesheet Processing
- Reporting courses such as Enquiry, Browser and Analyzer

Excelerator Advanced

Duration
2 Days

Intended Audience
Super, Advanced and Enquiry User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Enquiry, Browser & Analyzer
Balance Tables
Excelerator Basics
Optional Course(s): Security and Administration
Mandatory Knowledge: Familiarity with a Windows environment

Overview
The course builds on the basic course by introducing additional functionality that enables you to improve the efficiency and use of Excelerator reports. The course covers topics such as templates, running reports on the server, output split and email split. It does not cover how to create the report, which is covered on Excelerator Basics course.

Overall Objectives
By the end of the course you will:

- be able to create and run template reports
- be able to run reports from the server
- be able to distribute reports.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- SQL for Report Writers
- Agresso Security and Administration

Excelerator Basics

Duration
1 Day

Intended Audience

Super, Advanced, Enquiry and End User.

Prerequisites

Mandatory Course(s):	Introduction to Agresso Financial Basics Enquiry, Browser & Analyzer
Optional Course(s):	Security and Administration
Mandatory Knowledge:	Familiarity with a Windows environment You must be able to use the following functions in Microsoft Excel: • Insert rows, columns and worksheets • Format cells, rows, columns and sheets • Use formulas in cells to total, to subtract and to calculate percentages

Overview

The course introduces how to extract data from Agresso and then produce printed reports. It shows a simple way to take data from Agresso balance tables or enquiry results windows, and then report the results in Microsoft Excel's columns and rows.

Overall Objectives

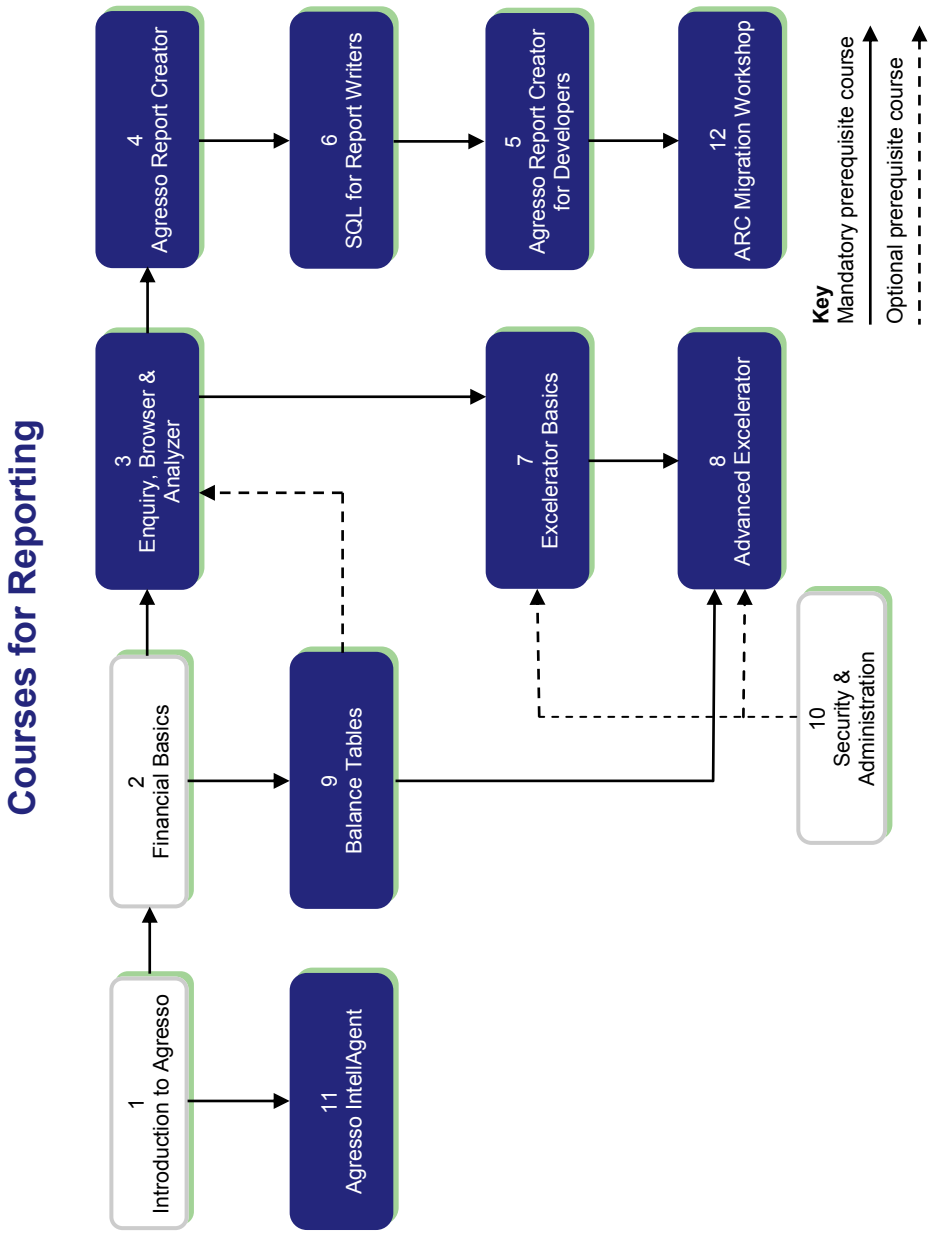
By the end of the course you will:

- develop an understanding of the scope and functionality of Agresso Excelerator, and how it interacts with Agresso Business World
- understand the key worksheets which are used in Excelerator
- be able to write reports on the Agresso database using Excelerator, by extracting data from Agresso Balance tables
- be able to write reports from within Agresso using Excelerator on the results of a browser enquiry.

Subsequent/Related Course(s) of Interest

The following courses may be of interest:

- SQL for Report Writers
- Excelerator Advanced
- Balance Tables



Enquiry, Browser & Analyzer

Duration
2 Days

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Financial Basics
Optional Course(s): Balance Tables
Mandatory Knowledge: Familiarity with a Windows environment

Overview
All of the Agresso screen enquiry methods are explored. Text results are seen with simple enquiries, setup/configuration enquiries, standard balance table enquiries, and Browser enquiries. Graphical results are seen with Chart and with Analyzer. Note that although many enquiry results can be printed, this course does not cover reports that are intended to be printed.

Overall Objectives
By the end of the course you will:

- understand what an enquiry is
- understand the scope and functionality of the enquiry methods available within Agresso Business World
- understand the scope and functionality of the enquiry methods available within Agresso Self service
- understand the different ways that enquiry results can be displayed.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Balance Tables
- Other reporting courses such as Excelerator Basics

Balance Tables

Duration
1 Day

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Introduction to Agresso
Mandatory Knowledge: Familiarity with a Windows environment
It is assumed that the attendees have a working knowledge of Agresso and are familiar with the Agresso building blocks of attributes, relations and account rules, and with Agresso Enquiry screens.
SQL knowledge is not a pre-requisite for this course as an appreciation of how it is used in Balance Tables and Database Views is included.

Overview
The course has been designed to cover the basic skills required to set up, maintain and use Agresso Balance Table functionality.

Overall Objectives
By the end of the course you will:

- understand the different categories of balances tables and their uses (there are 3 types of balance tables, this course concentrates on one of these types)
- be able to set-up a new balance table, populate it, and maintain it
- be able to set up data warehouses (a snapshot of your data at one time) and a simple database view
- be able to link a balance table into the Agresso Data Model (to bring in extra items of information)
- be able to set up and use mathematical and user defined amount types (% of total etc)
- understand the use of ‘special’ Agresso balance tables which are set up in Agresso.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:

- Enquiry, Browser & Analyzer,
- Excelerator Basics, Excelerator Advanced
- Advanced use of SQL provided by a variety of training organisations may be beneficial for advanced use of Balance Tables.