Welcome

Welcome to Unit4 Training. 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.

To help guide you through your training journey, the UK A-TRAIN has been developed. This will give a clear path through all the courses we offer, relative to the role you carry out on a daily basis.

You will find full details of the UK A-TRAIN on page 9.

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

The courses have been designed to cater for different user roles. 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.

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.

Course Catalogue Version
This is version 36 of the course catalogue.
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The Course for me

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

Which type of user are you?  
Once you have decided on the course for you, remember to review the A-TRAIN to pick which training path best fits your role.

Enquiry User  
Normally the person who asks questions, analyses information and creates reports, on which decisions are based.

End User  
Normally the person who enters and/or processes data.

Advanced User  
This person has a detailed understanding of the business or function area. This person is often a business analyst, or in a managerial role, 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. Often part of the implementation team, this person will be responsible for understanding how 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. Often part of the implementation team, this person will be responsible for understanding how Business World works from a technical perspective.
Training Options

Public Training
Unit4 Training offers 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 Business World users from other companies and industries, thereby offering a broader understanding of the enterprise resource planning software environment.

Full details of the public training schedule can be found on our website - www.unit4software.co.uk/support/training

Customer Training
All of our courses may be taught onsite using your facilities. 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 are also able to provide your organisation with customised training using these options.
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 alongside 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 each 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/support/training) or from any Training centres.
Unit 4 Training – UK A-TRAIN

Workstreams

1. Record to Report
2. Procure to Pay
3. Sales to Cash
4. Budget to Control
5. Asset Management
6. Reporting
7. Project Lifecycle
8. Supporting Functions
9. Hire to Retire and Payroll

For further details on each of the courses shown, please refer to the Course Catalogue which can be found at www.unit4.com/uki/customer-service-training
Business World Fundamentals

Intended Audience
All Users.

Prerequisites
Mandatory knowledge of a Windows environment.

Overview
This foundation elearning course is designed to give an overview of the Business World Fundamentals.

This course is mandatory for all users of Business World and is a prerequisite to all Business World courses.

Overall Objectives
By the end of the course you will:
- have obtained an overview of Business World, the main Business World modules and the interaction between them
- understand how Business World performs its processing and reporting functions
- understand the basic structure of Business World
- understand the basic enquiry and reporting capabilities of Business World

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

In addition, there are specific courses on reporting such as Reporting and Excelerator.
Business World Web

Intended Audience
All Users.

Prerequisites
Mandatory Course : Business World Fundamentals eLearning
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This foundation elearning course is designed to give an overview of the Business World Web interface.

This course is mandatory for all users of Business World and is a prerequisite to all Business World courses.

Overall Objectives
By the end of the course you will:
- understand how to navigate and interact with Business World Web
- understand the Web search functions

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

In addition, there are specific courses on reporting such as Reporting and Excelerator.
Business World Desktop

**Intended Audience**
All Users.

**Prerequisites**
Mandatory Course: Business World Fundamentals eLearning
Mandatory Knowledge: Familiarity with a Windows environment

**Overview**
This foundation elearning course is designed to give an overview of the Business World Desktop interface.

This course is mandatory for all users of Business World and is a prerequisite to all Business World courses.

**Overall Objectives**
By the end of the course you will:
- understand how to navigate and interact with Business World Desktop
- understand the Desktop search functions

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

In addition, there are specific courses on reporting such as Reporting and Excelerator.
Courses for Record to Report

Key
- Mandatory prerequisite course
- Optional prerequisite course

Note
To complete your learning path, please refer to the UK A-TRAIN for further Workstreams

Diagram:
- Mandatory eLearning
- Financials
- Bank Reconciliation
Financials

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Mandatory Knowledge: Familiarity with a Windows environment

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

The Business World Common module holds the set-up data that is common to other Business World 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 Business World 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 Business World, administer standing data on an existing Business World system and support other end users
- understand the scope of the Business World General Ledger
- understand how to enter different types of journal and attach documents to transactions
- understand how to retrieve information from the Business World General Ledger.

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

In addition, there are specific courses on system administration that include:
- System Administration
- IntellAgent
Bank Reconciliation

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Mandatory Knowledge: Familiarity with a Windows environment and Business World General Ledger

Overview
This course 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 Business World 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 Business World
- understand the setup of fixed registers to control the bank reconciliation process
- understand the mechanisms for importing bank statements into Business World
- understand how to manage the cashbook to manually adjust payments before matching transactions or, to 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 Business World and print a report of the reconciliation activity
- understand how to correct matched transactions which have been confirmed
- understand the facilities available for enquiring on a bank reconciliation.

Subsequent/Related Course(s) of Interest
In addition, there are specific courses on reporting such as Reporting and Excelerator.
Courses for Procure to Pay

Accounts Payable

Purchasing

Mandatory prerequisite course
Optional prerequisite course

Key

Note
To complete your learning path, please refer to the UK A-TRAIN for further Workstream's

Mandatory eLearning
Accounts Payable

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Business World General Ledger

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

Overall Objectives
By the end of the course you will:
- understand the basic structure of the Business World Accounts Payable module and its interaction with other components of 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 Business World
- 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 Reporting and Excelerator.

Duration
2 Days
Purchasing

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials

Optional Course(s): Inventory Management, if stocked products are to be purchased
Accounts Payable, but recommended

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Business World 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 Business World Purchase Orders and its interaction with other components of Business World
- understand the structure of the product file and how to set up new products
- understand the setup for requisitioning and Business World Web 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 Reporting and Excelerator.

Duration
3 Days
Courses for Sales to Cash

Mandatory eLearning → Financials → Accounts Receivable → Legal Debt recovery

- Sales Orders
- Inventory Management

Note: To complete your learning path, please refer to the UK A-TRAIN for further Workstreams.

Key:
- Mandatory prerequisite course
- Optional prerequisite course
Accounts Receivable

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Business World General Ledger

Overview
This course will consider the initial design and set-up of the Business World 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 Business World Accounts Receivable module and its interaction with other components of 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 Business World
- 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 Orders
- Reporting courses such as Reporting and Excelerator
Sales Orders

Intended Audience
Super and Advanced Users.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Optional Course(s): Inventory Management, if stocked products are sold
Accounts Receivable, but recommend
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 Business World Sales Orders and its
  interaction with other components of 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

Duration
2 Days
Inventory Management

Intended Audience
Super and Advanced Users.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
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 Business World Inventory Management and the interaction of it with other components of 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 Orders
Legal Debt Recovery

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

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Accounts Receivable

Mandatory Knowledge: Familiarity with a Windows environment
Familiarity with Business World 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 Business World 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:
- Financials
- Reporting courses such as Reporting and Excelerator
Courses for Budgeting

Mandatory eLearning

Financials

Balance Tables

Planner

Key

Mandatory prerequisite course

Optional prerequisite course

Note
To complete your learning path, please refer to the UK A TRAIN for further Workstreams
Planner

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Balance Tables
Reporting
Mandatory Knowledge: Familiarity with a Windows environment

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

Overall Objectives
By the end of the course you will:
• understand the scope and functionality of Business World Planner
• understand the integration with Business World Desktop
• be able to set up the Business World system components to use Planner, including attributes, attributes values (and periods if required)
• be able to set up the various fixed registers needed in order to use Planner
• be able to enter transactions for preparing budgets in Planner
• understand enhanced Planner functionality that provides additional tools for entry of transaction data and budget modelling
• understand the enquiry possibilities of Planner
• understand how to configure Planner to perform top-down budgeting
• Understand the capabilities of the Planner Server routines
• understand how to transfer budget data into a General Ledger balance table
• understand how to import transaction into Planner
• understand how to use forecasting tools within Planner
• to be able to use Planner in conjunction with Excelerator
• understand how Workflow can be incorporated into Planner.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
• System Administration
• Excelerator Basics
Courses for Asset Management

Mandatory eLearning

Financials

Reporting

Fixed Assets

Key
- Mandatory prerequisite course
- Optional prerequisite course

Note
To complete your learning path, please refer to the UKA TRAIN for further Workstreams.
Fixed Assets

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning Financials Reporting
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 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 Business World
- 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 Excelerator
Courses for Reporting

- Mandatory eLearning
  - IntellAgent
- Financials
  - Balance Tables
- Reporting
  - Excelerator Basics
    - Excelerator Advanced
    - Server Reporting
  - SQL & ReSQL for Report Writers
- Report Creator
  - Server Reporting
  - SQL & ReSQL for Report Writers
  - ARC for Developers
  - ARC Reporting Migration Workshop

Note
To complete your learning path, please refer to the UK A-TRAIN for further Workstreams

Key
Mandatory prerequisite course
Optional prerequisite course
Reporting

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Optional Course(s): Balance Tables
Mandatory Knowledge: Familiarity with a Windows environment

Overview
All of the Business World 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 Analyser. 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 Business World
- understand the scope and functionality of the enquiry methods available within Business World Web
- 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

Duration
2 Days
Balance Tables

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Mandatory Knowledge: Familiarity with a Windows environment
It is assumed that the attendees have a working knowledge of Business World and are familiar with the Business World building blocks of attributes, relations and account rules, and with Business World 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 Business World 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 Business World 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’ Business World balance tables which are set up in Business World.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- Reporting
- Excelerator Basics, Excelerator Advanced
- Advanced use of SQL provided by a variety of training organisations may be beneficial for advanced use of Balance Tables.
**IntellAgent**

**Intended Audience**
Super User and Staff who will be supporting the Business World system.

**Prerequisites**

Mandatory Course(s):  
- Mandatory eLearning
- Reporting

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

This 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 Business World 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 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 and RESQL for Report Writers
- Reporting

**Duration**
1 Day
Excelerator Basics

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Reporting
Optional Course(s): System 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 Business World and then produce printed reports. It shows a simple way to take data from Business World balance tables or enquiry results windows, and then report the results in Microsoft Excel’s columns and rows.

All of this is in line with the Report Engine 9 style of reporting.

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

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- Server Reporting
- SQL and RESQL for Report Writers
- Excelerator Advanced
- Balance Tables
Excelerator Advanced

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Reporting
Excelerator Basics
Optional Course(s): System 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
This course builds on the Excelerator Basics course by introducing additional functionality that enables you to improve the efficiency, layout and use of Excelerator reports. The course is designed for super users, end users, and enquiry users.

All of this is in line with the Report Engine 9 style of reporting.

Overall Objectives
By the end of the course you will:
- be able to create template reports in two different ways
- create a Management Reporting Pack
- use single and multi-layered subtotals
- use subtotalling keywords to enhance the report display
- create a single-sheet split to tabs
- create and run a simple postback.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- Server Reporting
- SQL and RESQL for Report Writers

Duration
1 Day
Excelerator Reporting Migration Workshop

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Excelerator Basics (Report Engine 8)
Excelerator Advanced (Report Engine 8)
Optional Course(s): SQL and ReSQL for Report Writers (Report Engine 8)
System Administration
Mandatory Knowledge: Familiarity with a Windows environment
You must be very familiar with use of Excelerator reports as a developer and with the SQL SELECT Statement syntax, INNER and LEFT OUTER JOINs and UNIONs. This course will build upon this knowledge.

Overview
This course covers the main parts of ReSQL and how to upgrade an Excelerator report to use the Report Engine 9 structures. Existing knowledge is vital.

All of this is in line with the Report Engine 9 style of reporting.

Overall Objectives
By the end of the course you will:
• develop an understanding of the scope and functionality of ReSQL
• understand the multiple ways of using and connecting queries in ReSQL
• be able to migrate reports to take advantage of the latest functionality

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
• SQL and ReSQL for Report Writers

PLEASE NOTE
On the second afternoon you will have a chance to start the migration of one or two of your own company’s reports. Please bring them with you on a data stick or email them to your webmail account.
Agresso Report Creator

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
Reporting
Optional Course(s): System Administration
Mandatory Knowledge: Familiarity with a Windows environment

Overview
The course introduces how to extract data from Business World and then produce printed reports. It shows a simple way to take an existing report from Business World and alter it to suit the required layout. It takes you through the process that the software uses to run an ARC report and how to replace a standard one with your own report layout.

All of this is in line with the Report Engine 9 style of reporting.

Overall Objectives
By the end of the course you will:
- develop an understanding of the scope and functionality of Business World Report Creator and how it interacts with Business World
- be able to take an existing report, convert it to a Report Studio report and change the layout, add/remove sections and columns, change/add labels, add logos, add simple formulae, control page breaks, etc.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- Server Reporting
- SQL & RESQL for Report Writers
- ARC for Developers

Duration
1 Day
Server Reporting

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s):
- Mandatory eLearning
- Financials
- Reporting
- Excelerator Basics/Advanced and/or ARC

Optional Course(s):
- System Administration

Mandatory Knowledge:
- Familiarity with a Windows environment

Overview
The course introduces the differences between server and client reports then how to add server reports to the Business World main menu and sub-menus. It shows how to split those server reports and how to send or save the resulting report(s). It also covers the steps to place server reports on the Web.

All of this is in line with the Report Engine 9 style of reporting.

Overall Objectives
By the end of the course you will:
- understand what a server report is (vs a client report)
- be able to add a report to the menu
- understand how to split and send reports
- directly add split reports to the Document Archive
- add a Server Report to be available via the Web.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- ARC
- SQL & RESQL for Report Writers
- ARC for Developers

Duration
1 Day
SQL and RESQL for Report Writers

**Intended Audience**
Super and Advanced User.

**Prerequisites**
Mandatory Course(s): Mandatory eLearning, ARC or Excelerator Basics and Excelerator Advanced Server Reporting
Optional Course(s): System Administration
Mandatory Knowledge: Familiarity with a Windows environment

**Overview**
The course introduces SQL with joins and unions to extract data from the Business World database and then produce printed reports. It continues by teaching RESQL and the use of the Report Studio, including new tables and relating datasets. During this you will learn to get descriptions and relations of data, learn to find your way around the Business World database (introducing familiarity with important tables,) and ultimately will be taught to produce a simple help table.

All of this is in line with the Report Engine 9 style of reporting.

**Overall Objectives**
By the end of the course you will:
- develop an understanding of the scope and functionality of Report Studio and how it interacts with Business World Business World
- be able to create a new query and create that as one of a choice of final reports
- create temporary tables and update
- relate data sets together.

**Subsequent/Related Course(s) of Interest**
The following courses may be of interest:
- ARC for Developers
ARC for Developers

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s):
- Mandatory eLearning
- Reporting
- ARC
- Server Reporting
- SQL & RESQL for Report Writers

Optional Course(s):
- System Administration

Mandatory Knowledge:
- Familiarity with a Windows environment

Overview
The course shows how to write a direct SQL-based ARC report, including such items as the use of event sequencing to control the data rendered.

All of this is in line with the Report Engine 9 style of reporting.

Overall Objectives
By the end of the course you will:
- develop an understanding of the Reporting Events
- be able to write code to conditionally manipulate data
- be able to use and control multiple canvases
- have an understanding of the creation and use of sub-reports.
ARC Reporting Migration Workshop

**Intended Audience**
Super User.

**Prerequisites**
Mandatory Course(s):
- ARC (Report Engine 8)
- SQL for Report Writers (Report Engine 8)
- ARC for Developers (Report Engine 8)

Optional Course(s):
- System Administration

Mandatory Knowledge:
You must be very familiar with use of ARC reports as a developer and with the SQL SELECT Statement syntax, INNER and LEFT OUTER JOINs and UNIONs.

**Overview**
This course covers the main parts of ReSQL and how to upgrade an ARC report to use the Report Engine 9 structures. Existing knowledge is vital.

**Overall Objectives**
By the end of the course you will:
- develop an understanding of the scope and functionality of ReSQL
- understand the multiple ways of using and connecting queries in ReSQL
- be able to migrate reports to take advantage of the latest functionality.

**Subsequent/Related Course(s) of Interest**
The following courses may be of interest:
- SQL and ReSQL for Report Writers – full three-day course

**PLEASE NOTE**
On the second afternoon you will have a chance to start the migration of one or two of your own company’s reports. Please bring them with you on a data stick or email them to your webmail account.
Courses for Project

- Mandatory eLearning
- Financials
- Project Basics
- Project Invoicing
- Project Timesheets

Note
To complete your learning path, please refer to the UK A-TRAIN for further Workstreams

Key
- Mandatory prerequisite course
- Optional prerequisite course
Project Basics

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials
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 Business World Project Costing and Billing (PCB).

Overall Objectives
By the end of the course you will:
- understand PCB sufficiently to contribute to an implementation of Business World Project Costing and Billing as a Super User
- understand the basic structure and workflow of Business World 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 a 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:
- Project Timesheets
- Project Invoicing
- Reporting courses such as Reporting
Project Timesheets

**Intended Audience**
Super and Advanced User.

**Prerequisites**
Mandatory Course(s):  Mandatory eLearning
Financials
Project Basics
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 to register, amend, post and follow up time transactions in the Business World Project Costing and Billing (PCB) module.

**Overall Objectives**
By the end of the course you will:
- understand the dataflow of time transactions Business World PCB from timesheet entry to posting in Business World 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 Business World General Ledger
- be able to do enquiries and follow up on time transactions on all levels in Business World Desktop.

**Subsequent/Related Course(s) of Interest**
The following courses may be of interest:
- Project Invoicing
- Reporting courses such as Reporting
Project Invoicing

Intended Audience
End User.

Prerequisites
Mandatory Course(s):
- Mandatory eLearning
- Financials
- Project Basics

Mandatory Knowledge:
- Familiarity with a Windows environment

Overview
This course has been designed to provide you with an in-depth understanding of how to generate and process invoices for projects; part of the Business World 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 Business World and Business World Web 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 Timesheets
- Reporting courses such as Reporting

Duration
1 Day
Courses for Supporting Functions

- Mandatory eLearning
- Financials
- Data Import
- System Administration
- Workflow
- Technical Introduction to Business World

**Key**
- Mandatory prerequisite course
- Optional prerequisite course

**Note**
To complete your learning path, please refer to the UK A-TRAIN for further Workstreams.
System Administration

**Intended Audience**
Super, Advanced Users and individuals with functional database administration responsibility.

**Prerequisites**
Mandatory Course(s):
- Mandatory eLearning Financials

**Overview**
This course has been designed to cover the basic skills required to carry out the non-technical administration of the Business World 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 building common tools such as Flexi-fields.

**Overall Objectives**
By the end of the course you will:
- understand the functions of the Business World 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 create and maintain Flexi-fields, Forms and Document Archive.
- be able to clear unwanted data

**Subsequent/Related Course(s) of Interest**
The following courses may be of interest:
- IntellAgent
- Balance Tables
Workflow

**Intended Audience**
Super and Advanced User.

**Prerequisites**
Mandatory Course(s):
- Mandatory eLearning
- Financials
- Reporting
- System Administration

Optional Course(s):
- Purchasing or Sales Orders
- IntellAgent

Mandatory Knowledge:
- Familiarity with a Windows environment

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

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

**Duration**
3 Days
Data Import

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

Prerequisites
Mandatory Course(s): Mandatory eLearning
Financials 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 Business World. It 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 Business World.

Overall Objectives
By the end of the course you will:
- fully understand the scope and uses of Business World Data Import utilities
- be able to set up the Business World Data Import utilities within the Business World environment
- be able to use the Data Import utilities to import transactional and master file data to the Business World database
- be able to use the Data Import utilities to import data directly into Business World data tables.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- System Administration
- Excelerator Basics

Duration
1 Day
Technical Introduction to Business World

Intended Audience
ICT Technical User.

The Technical Introduction to Business World is mandatory for IT staff who will be involved in installing and administering a Unit4 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 RDBMS environment.

Overview
The Technical Introduction to Business World will provide the Business World customer’s technical staff with a working knowledge of the Business World architecture, and the installation and management of Business World within the following environments:
- Servers – Microsoft Windows Server servers
- Clients – Microsoft Windows Clients
- Databases – Microsoft SQL Server and Oracle Database

The course is not a substitute for formal technical training in Windows Server, Microsoft SQL Server or Oracle Database. The training will provide delegates with a good understanding of the Unit4 Business World Milestone platform and how it is configured and supported within the Windows Operating System and RDBMS environments.

The two day training will cover:
- Business World Milestone overview (architecture, environments, service accounts, folder structure and shared resources)
- routine maintenance and administration tasks (Business World Management Console environment variables, Installing Business World service packs and Business World updates; Configuring printers and email profiles, Licensing Business World)
- database configuration requirements, database objects, data types and structures, data migration processes between environments including re-pointing environments
Courses for H2R and Payroll

- Work Schedule and Absence
- Training Administration
- HR Reporting
- Expenses
- Implementing Payroll
- Processing Payroll
- Year End Payroll
- HR Reporting

Key
- Mandatory prerequisite course
- Optional prerequisite course

Note
To complete your learning path, please refer to the UK A-TRAIN for further Workstreams.
Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
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 Business World Human Resource and fully utilise its potential.

Overall Objectives
By the end of the course you will:
- understand the setup of the Business World 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 Business World Competences and their links to other Business World 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 Reporting
Work Schedule and Absence

Intended Audience
Super User.

Prerequisites
Mandatory Course(s):  Mandatory eLearning
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 Business World Desktop and Web and enquiry on absence entries.

Overall Objectives
By the end of the course you will:
- understand the basic structure of the Business World Absence Management module and its interaction with other components of Business World
- 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 Business World 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 HR Reporting

Duration
1 Day
Expenses

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Mandatory Knowledge: Familiarity with a Windows environment

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

Overall Objectives
By the end of the course you will:
- understand the scope and functionality of Business World Expense Ledger for travel expenses
- be able to set-up the appropriate Business World fixed registers required for travel expenses recording and posting
- be able to enter record and post travel expenses in Business World
- 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:
- HR Reporting
- Accounts Payable
- Workflow
Training Administration

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
HR Employee
Mandatory Knowledge: Familiarity with a Windows environment

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

Overall Objectives
By the end of the course you will:
- understand the basic structure of the Business World Training administration module and its interaction with other components of Business World
- 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 of the course (successful or otherwise)
- understand the link with employee competences
- understand how to run enquiries and produce reports
- understand the training administration functionality available via Business World Web.

Subsequent/Related Course(s) of Interest
The following courses may be of interest:
- Reporting course such as HR Reporting
HR Workflow

Intended Audience
Super and Advanced User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
HR Employee
HR Reporting
System Administration
Optional Course(s): Expenses
Mandatory Knowledge: Familiarity with a Windows environment

Overview
This course is designed to introduce the concept of workflow in Business World, 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 Business World
- understand some of the practical applications of workflow
- understand how workflow operates in Business World
- understand what you need to set up in Business World before you can create a workflow
- understand how you create and configure a basic workflow in Business World
- understand how you can integrate Business World 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 Business World facilities for creating, mapping, and maintaining workflows.

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

Intended Audience
Super, Advanced, Enquiry and End User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
                     HR Employee
Mandatory Knowledge: Familiarity with a Windows environment

Overview
All of the Business World 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 Business World
- understand how to manage reports within the Desktop and in Web
- 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
Implementing Payroll

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Mandatory eLearning

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

Overview
This course is designed to show how to customise Business World 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 Business World to handle new payment and deductions
- be able to 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, System Administration, Accounts Payable, Processing Payroll, Year End Payroll
- Reporting courses such as HR Reporting

Duration
2 Days
Processing Payroll

**Intended Audience**
Super, Advanced and End User.

**Prerequisites**
Mandatory Course(s): Mandatory eLearning
Implementing Payroll

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

**Overview**
This course covers how to run the Business World UK Payroll processes including, how to set up new employees, generate pay proposals and payments and follows the 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 Business World.

**Subsequent/Related Course(s) of Interest**
The following courses may be of interest:
- HR Employee
- HR Reporting
- Year End Payroll

**Duration**
2 Days
Year End Payroll

Intended Audience
Super User.

Prerequisites
Mandatory Course(s): Mandatory eLearning
Implementing Payroll
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 Business World 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 Business World modules and tools to support your business processes.
**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.uk@unit4.com

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.

Full Terms and Conditions are available on our website www.unit4software.co.uk/support/training

*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.*
Practical Information - cont.

Location
Unit4 has Training Facilities in three 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.

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
- eLearning

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 online.
# Course Code List

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<td>9. H2R and Payroll</td>
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