

# CREATING SPACE

# UNIT4

The Westin Indianapolis  
Intensive Training: October 16-17, 2018  
Unit4 Connect: October 18-19, 2018

## UNIT4 BUSINESS WORLD

**Tuesday, October 16, 2018**

### Advanced Report Writing (Two Part Course)

Intensive Training

**Level: Advanced**  
**Time: 9:00 – 17:00**

**Instructor: Ian Fraser**

The intended audience is technical report developers with existing knowledge of report development in Business World. Some level of technical knowledge will be necessary as we will be developing reports using SQL. Description: A deeper look into the RESQL functionality and creating reports using Xtra. The intended audience for this session is technical report developers with existing knowledge of report development in Business World. Some level of technical knowledge will be necessary as we will be developing reports using SQL. The intended course outline is as follows:

- Running and modifying standard reports
- Understanding the report process
- Become familiar with report engine composite files (.RERX)
- Understand how to select data using SQL
- Understand how to select data using browsers
- Become familiar with Report Engine SQL (ReSQL) to collect data
- Be able to use ReSQL to connect and manipulate data
- Understand the basics of creating Xtra reports

- How to get these reports to the end user
- Grouping data, creating formulas, sub-totalling, inserting pictures and changing the physical properties of the controls on the report
- Learning tips and tricks that make the task of creating a report less daunting and time consuming

*\*Note: Part two of the course will take place on Wednesday, October 17, 2018 from 9:00 – 17:00. Please ensure you are available to attend both sessions.*

### Reporting: Excelerator (Two Part Course)

Intensive Training

**Level: Any**  
**Time: 9:00 – 17:00**

**Instructor: Tiffany White**

*Prerequisites: Familiarity with the Business World environment and with creating and saving browser reports. A good working knowledge of Excel, including insertion of row/columns, formatting and formulas. Attendees are expected to familiarize themselves with the topic matter and are encouraged to bring any live examples, if possible, to discuss in class or (in interest of time) to discuss with other users and trainers during the break.*

Excelerator is Business World's Microsoft Excel-based add-on reporting tool that allows users to work in the familiar Excel environment while accessing Business World data structures. You can take full advantage of all the graphical formatting capabilities of this popular spreadsheet package and leverage your existing skills, while using

real Business World data. Unlike traditional reporting methods, using spreadsheets that rely on formulas to check and re-check your calculations, Excelerator extracts data directly from the Business World tables, so time is not wasted producing inaccurate reports. If you have a good working knowledge of Excel and want a more sophisticated method of extracting data than a cut-and-paste scenario for report production, Excelerator can help! This hands-on course will introduce you to the capabilities of Excelerator and show you how to use the intrinsic power of Microsoft Excel to re-format or perform further analysis of your Business World data. At the conclusion of this course, you will be able to produce basic reports such as Profit and Loss, balance sheet and more.

*Note: Part two of the course will take place on Wednesday, October 17, 2018 from 9:00 – 17:00. Please ensure you are available to attend both sessions.*

### HR/Payroll: Flexi Fields and Forms

Intensive Training

**Level: Any**  
**Time: 9:00 – 17:00**

**Instructor: Tracey Cairns**

This course will provide an overview of Flexi Fields and Forms for those working in HR and Payroll.

[unit4connect.com](http://unit4connect.com)

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## IntellAgent

Intensive Training

**Level: Intermediate**

**Time: 9:00 – 17:00**

**Instructor: Ryan Coutts**

Learn to utilize Unit4 Business World to effectively focus on training needs as part of your employee's personal development program and automatically record their achievements and competencies. Learn to make the most of Unit4 Business World Appraisals to get the full picture of your employees' skills and abilities, and identify opportunities for improvement. UNIT4 Business World can be designed to engage supervisors and staff in a meaningful two-way performance appraisal process using competency-based evaluation that is tailored to the needs of your organization.

## HR/Payroll: Basic Payroll

Intensive Training

**Level: Beginner**

**Time: 9:00 – 17:00**

**Instructor: Santos Bonilla**

Get acquainted with the basic functionality of Unit4 Business World Payroll including running and modifying standard reports.

## Wednesday, October 17, 2018

### HR Payroll: Employee Information

Intensive Training

**Level: Any**

**Time: 9:00 – 17:00**

**Instructor: Tracey Cairns**

Learn to use the Unit4 Business World tools such as Communities, Timelines, Information pages, Dynamic Zoom and Collaborator to give power to your employees by allowing them to access important information by themselves, whilst reducing calls to your HR Team. The course is aimed customers who would like to learn how to create a centralized

area to allow employees to take care of many different human resources-related and job-related tasks that would otherwise need to be completed by human resources personnel or management, thus hopefully help companies save labor hours and increase efficiency.

### Reporting: Balance Tables

Intensive Training

**Level: Intermediate**

**Time: 9:00 – 17:00**

**Instructor: Ryan Coutts**

What are balance tables and how can they be used within Business World? There are many different options available when creating balance tables and how they can be used for enhancing and simplifying reports. This session will look at how to balance tables can be created and populated with data along with the many options that are available when using balance tables. Additionally this session will also look at how data warehouses can be used to further augment reporting capabilities.

### HR/Payroll: Competences and Appraisals

Intensive Training

**Level: Any**

**Time: 9:00 – 17:00**

**Instructor: Santos Bonilla**

Learn to utilize Unit4 Business World to effectively focus on training needs as part of your employee's personal development program and automatically record their achievements and competencies. Learn to make the most of Unit4 Business World Appraisals to get the full picture of your employees' skills and abilities, and identify opportunities for improvement. Unit4 Business World can be designed to engage supervisors and staff in a meaningful two-way performance appraisal process using competency-based evaluation that is tailored to the needs of your organization.

## Thursday, October 18, 2018

### Unit4 Business World

#### Welcome Sessions

**Level: Any**

**Time: 11:00 – 11:30**

**Repeated: 11:30 – 12:00**

**Instructor: Thomas Staven**

Join us for a mini breakout of your choice in industry and product groups where our Centers of Excellence will welcome you to Connect. This is your chance to get to know our experts and your peers in the Unit4 community who are in similar industries or using the same products. Our Centers of Excellence are excited to meet you and these welcome sessions will help you set the tone for what you can expect to get out of your Connect experience. We've created this space for you to make the connections you need to get the most of your time here.

### Reporting: Balance Tables

Hands-On Session

**Level: Beginner**

**Time: 13:30 – 14:30**

**Instructor: Ryan Coutts**

During this session we will look at what balance tables are used for, how to create balance tables and the process by which data enters the balance tables. We will also discuss various configuration options that are available for balance tables.

### Technical: Copying/Setting Up a New Environment

Hands-On Session

**Level: Beginner Technical**

**Time: 13:30 – 14:30**

**Instructor: Ian Fraser**

*Prerequisites: Technical users with some knowledge of databases and management console.*

This session provides an overview of taking a copy of an existing Business World

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environment, and using it to create a new one or update an existing one. Topics include: Platform prerequisites, preparation, and environment set-up, recommendations in order to best prepare for a new environment and lessons learned, best practices, discussion on common obstacles and challenges, and strategies for resolution.

## Workflow in Business World Finance

### Hands-On Session

**Level: Super User/CFO/Intermediate**  
**Time: 13:30 – 14:30**

**Instructors: Diane Frankcom & Janbert Van Dijken**

We all know workflow can help your business manage approvals; learn how to enhance it, in order to facilitate controls for your financial processes. This course will help you improve efficiency through delivering tasks on the mobile app.

## Payroll Dashboard

**Level: Any**  
**Time: 13:30 – 14:30**

**Instructor: Tracey Cairns**

Discover how using Unit4 Payroll Dashboard can streamline payroll processing.

## Reporting: Information Browser

### Hands-On Session

**Level: End User/Beginner**  
**Time: 14:45 – 15:45**

**Prerequisites:** Previous Browser knowledge

**Instructor: Tiffany White**

Learn the basics of Information Browser to enable you to wow your fellow co-workers on how easy it is for the casual user to make their own web based reports, tailored to their specific needs. Information Browser allows you to create and view real-time reports using data contained in predefined reporting objects. These objects contain data dedicated to specific product areas. For example, an employee object will contain all necessary

data to create a report on Employee information, relations, addresses etc. This is a hands-on course which will allow you to understand the basics of what can be done with tool as well as become familiar with the interface.

## Using Business World Procurement & Workflow to Track Multi-Client Funding Requests

**Level: Any**  
**Time: 14:45 – 15:45**

**Instructors: Stephen Northcutt, Jill Ross & Claudia Juarez**

Heifer International is an international Not-for-Profit organization with the mission of ending hunger and poverty while caring for the Earth. For more than 70 years, we have provided livestock and environmentally sound agricultural training to improve the lives of those who struggle daily for reliable sources of food and income. We currently work in more than 25 countries, including United States, to help families and communities become self-reliant. Each of Heifer's offices located internationally, routinely request funds from Headquarters for operational and programmatic work. The requests came in forms of emails, fax requests, and paper forms that required manual distribution and original signatures. Heifer looked to U4BW Procurement module to automate and streamline the current process and increase visibility. The following challenges were faced:

- a. Multi-currency clients
- b. Multi-client U4BW environments
- c. Cross-clients / Cross-departmental approval process
- d. Using the Procurement module for 3 different processes

Using the U4BW procurement module to manage fund requests coming from the international offices to HQ, Heifer benefited from the following:

1. On-demand self-service through U4BW web client, allowing for global visibility
2. Electronic verification and approval process through U4BW's workflow.
3. Automatic entries to register payment transactions simultaneously at headquarters and the country office
4. Automatic email notifications to users when disbursements have been completed
5. Visibility of the request from the time the request is made until the payment has been made and recorded

## Revenue Recognition with PCB

**Level: Super User/End User**  
**Time: 14:45 – 15:45**

**Instructor: Markus Baggio**

ASC606 / IFRS 15 required organizations to follow certain rules to recognize their project revenue. This session will show how the new module Revenue Recognition is setup and how it works.

## COE: The State of Unit4 Business World

**Level: Any**  
**Time: 14:45 – 15:45**

**Instructor: Thomas Staven**

This session will look at the our complete offering and the business results we are driving and how they are being underpinned all the way from technology platform, product portfolio capabilities, packaged best practice in the shape of value accelerators, delivery methodologies and KPIs to measure the results.



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## Reporting: Report Output Management

Hands-On Session

**Level: Intermediate / Super User**

**Time: 16:00 – 17:00**

*Prerequisites: UBW and Report Writing Knowledge*

**Instructor: Tiffany White**

Report Output Management...did you know there is a screen for this? No longer do you have to add all parameters by hand! Yes, it has been around for a while, but many people still aren't aware! Discover what is available to you for your reports including emailing report output, using document archive and splitting documents to file. Learn about the different parameters available - documented and undocumented ones!

## Technical: Installing Updates and Experience Packs

**Level: Beginner Technical**

**Time: 16:00 – 17:00**

**Instructor: Ryan Coutts**

Keeping up to date with the most recent updates and experience packs is a key part of using Business World. In this session we will walk through the update process and steps for installing experience packs including where to find the latest packages and how to lessen the impact for users.

## Business World Travel and Expenses

**Level: Super User / End User / CFO**

**Time: 16:00 – 17:00**

**Instructor: Diane Frankcom**

Find out how the integrated Travel and Expenses module can help you enter, track and pay your employees' expenses quickly and efficiently. Find out how the mobile app can be used to save receipts on the move, and how it can automatically recognize and capture data directly from the receipt itself.

## Information Browser Reporting for HR and Payroll

**Level: Any**

**Time: 16:00 – 17:00**

**Instructor: Tracey Cairns**

Discover the ease and flexibility of reporting on HR and Payroll data using the Information Browser Reporting. This flexible functionality will provide you with increased information value through easy report creation and efficient distribution.

**Friday, October 19, 2018**

## UBW Reporting: Convert Reports to RERX from Excel

**Level: Super User/Advanced**

**Time: 9:30 – 10:30**

*Prerequisites: Some knowledge of existing Business World reporting tools*

**Instructor: Ian Fraser**

In this session, you will learn how to take an existing Excelerator report built in earlier versions of Unit4 Report Engine, and convert it to an RERX report in order to take advantage of 64 bit reporting queues and additional components available in the new format.

## UBW Reporting:

### Reporting Tips

**Level: Intermediate/Super User**

**Time: 9:30 – 10:30**

**Instructor: Tiffany White**

Creating custom reports is a complex task. This session will highlight some tips and tricks for UBW Reporting to help make your work life easier. In this session, we will review nice to know and need to know for browsers, browsers to excel, server processes and report variants, relations etc.

## Forms & Flexi-Fields

**Level: Super User**

**Time: 9:30 – 10:30**

**Instructor: Janbert van Dijken**

In this session, we will look at how you can leverage Flexi-Fields and Forms in Business World to capture and review information in one system.

## Project Planner and People Planner

**Level: Super User/End User/CFO**

**Time: 9:30 – 10:30**

**Instructor: Diane Frankcom**

See how your Project Costing and Billing can be extended to incorporate fully integrated PCB-level project planning tools. Learn how the integration of PCB and HR allow searches and streamlined allocation of resources, right through to timesheet entry.

## UBW Reporting: Dashboards

**Level: End User/Beginner**

**Time: 11:00 – 12:00**

**Instructor: Ian Fraser**

Business World has many different reporting options and dashboards are a way to combine several reports into one quick and easy to read page. Learn how you can view the results of enquiries in a graphical format using charts and graphs, drill down to detail in browsers, and create dashboards using information pages.

## Implementing EDI invoicing for Unit4

**Level: Any**

**Time: 11:00 – 12:00**

**Instructors: Rod Tomlinson & Sanjeev Kainth**

Learn how Canalta Family of Companies implemented Electronic Data Interchange (EDI) with UNIT4 and saved the company an estimated 1000 hours per year of tedious data entry for incoming invoices. Canalta owns and operates 44 Hotels under 5 different brands, 45 A&Ws and 15 Boston Pizzas across western Canada and required a way to lower the administrative costs of their properties and sustain these costs throughout future growth.

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EDI 810 is an international standardized format used between trading partners. This standardized format helps Canalta accurately and consistently automate the data entry of incoming Invoices where workflow then passes the invoice to the appropriate managers for approval. Learn about the challenges we faced, software required, customizations, and the steps involved for our implementation.

## **Improve Your Daily Work with Portfolios and Workspaces**

**Level: Super User/End User**  
**Time: 11:00 – 12:00**

**Instructor: Markus Baggio**

Users can link screens and inquiries to have all relevant information in one place. In this session, we will have example portfolios demonstrated for Project, Vendor, Customer and employees. Attendees can see how portfolios are used and will also get a very high level overview of how they are setup.

## **Overview of Modeler**

**Level: Super User**  
**Time: 11:00 – 12:00**

**Instructor: Janbert van Dijken**

In this session, we will provide an overview of Modeler including building and viewing structures in UBW and using these structures in various functions like workflow, data control, browser and access.

## **Reporting: Report Parameters**

**Level: Super User/Intermediate**  
**Time: 12:30 – 13:30**

**Instructor: Ryan Coutts**

Report parameters are an important part of every report as they allow users to control the information that is going to be presented. This session will look at some of the options that are available when using parameters to optimize your reporting efficiency and providing flexibility for users.

## **Upgrade Factory**

**Level: Any**  
**Time: 12:30 – 13:30**

**Instructor: Luis Monteiro**

With UBW 7.2 available, Unit4 aims to stabilize our UBW releases and make them technically swiftly upgradeable. For UBW customers on M7 it means that as soon as a new version is available, the technical upgrade complexity and duration is simplified. This has increased the interest for upgrade, so an upgrade factory is defined as part of our global delivery center with specific international local teams capable of delivering upgrades around the world in a more standardized and repetitive way. Functional existing complexity of each installation will determine the overall upgrade complexity and duration.

## **Taking Business to the Next Level: Goodbye Paper, Hello Digital**

**Level: Any**  
**Time: 12:30 – 13:30**

**Instructor: Linda Sabatini & Mary Carmichael**

Metro Vancouver, a regional government in British Columbia, with over 1,500 employees and an operating budget of \$761 million, implemented Unit4 Business World in 2018. Their vision is to have one version of the truth using Unit4 as its core financial system. Metro Vancouver reduced and reengineered numerous integrations with other business systems reducing data duplication and redundancy. In this session learn how Metro Vancouver leveraged Unit4's flexible architecture with respect to account rules, relations and workflows to convert their business to an automated paperless environment. Presenters will focus on how they streamlined processes and empowered their people by providing them with a financial system to help take their business to the next level of digital transformation.

## **COE: Unit4 Business World Solutions Framework**

**Level: Any**  
**Time: 12:30 – 13:30**

**Instructor: Thomas Staven**

An update on the value framework for Unit4 Business World and our view of the ERP market; looking at the complete offering and the business results we are driving and how they are being underpinned all the way from technology platform, product portfolio capabilities, packaged best practice in the shape of value accelerators, delivery methodologies and KPIs to measure the results.