# COURSE OUTLINE

## Sage 300 ERP Insight Report Author

Supply Chain | NGO | Capital Budgets
Client Care | Payroll | ERP | Development
Project Management | Manufacturing | Enterprise Budgeting | HR
Customer Services | BI | Retail | Sales
EPM | Asset Management | Training
Change Management | VRM | CRM | Mining | eWorkflow
20 | @ | 2014

# Course Outline

This course will provide the user with the ability to create and customize reports allowing the user to manage distribute and collaborate on data from a single unified source.

## Course duration

This course is scheduled for one (1) day from 9:00 till 16:00.

## Course pre-requisites

Students should possess basic knowledge in bookkeeping or accounting theory, basic bookkeeping or accounting theory, and basic knowledge of Windows.

## Documentation
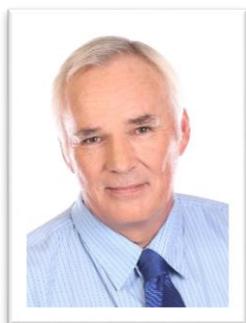
The following documentation is included with the course

- Sage ERP user guide
- User competency assessment
- Certificate of attendance

## Who should attend?

All Sage 300 ERP users that have no accounting background, or need to update their skills

# The Facilitator

## Werner Muller

Werner Muller has been active in Sage 300 ERP for twelve years and in this time has obtained a lot of practical and theoretical experience - with 30 years of accounting experience.

He comes from a corporate and training environment where he was a junior lecturer for statistics and applied maths. He completed his articles at Theron van der Poel and attended the University of Pretoria where he studied B-Com Auditing. He is dedicated to training since it is his passion to deliver effective meaningful skills and to uplift all the students coming through our AccTech Systems training centre.

# Topics Covered

- Introduction to Sage ERP Accpac Insight
    1. Overview of Sage ERP Accpac Insight
    2. Using data links for creating reports
    3. Using data warehouse for creating reports

      4. Sage ERP Accpac Insight reports
- Overview of Sage ERP Accpac Insight Viewer
     1. How Sage ERP Accpac Insight works
     2. Starting Sage ERP Accpac Insight
     3. The Sage ERP Accpac Insight Viewer menu commands
     4. The Sage ERP Accpac Insight Viewer toolbars
- Generating reports with Sage ERP Accpac Insight Viewer
     1. Creating a new report sheet
     2. Refreshing existing reports
     3. Refreshing existing workbooks
     4. Drilling down to detail
     5. Removing drill-down reports
     6. Changing the source database
     7. Setting default locations
- Overview of Sage ERP Accpac Insight Author
     1. An overview of the report definition
     2. Using the "build new template" wizard
     3. Inserting a column
     4. Inserting a row
- Working with columns
     1. An overview of columns
     2. Using the insert new column wizard
     3. Modifying an existing column
     4. An overview of all column types
          - Query
          - <None>
          - Model
          - Total
          - Model-Forecast
          - Calc
- Working with row groups
     1. An overview of row groups
     2. Using the insert new row group wizard
     3. Modifying an existing row group
     4. An overview of all row types
          1. Single
          2. Multiple
          3. Model
- The hidden definition area
     1. Using the definition area

2. Hiding the definition area
   3. Updating the report with new calc formulas
- Creating customised drill-down reports
   1. Authoring a report at from detail transactions
   2. Saving the drill-down report
   3. Attaching the drill-down report to a column

## Venue Details

We have training facilities in Centurion.

### Centurion

1001 Clifton Avenue
Lyttelton Manor
Centurion

## For bookings or more information

For bookings or more information please feel free to contact us at 0861 11 1680 or e-mail training@acctech.biz

For the latest event schedule visit our training page on www.acctech.biz