



# **BizNet Training Offerings Course Curriculum**

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## General Training and Guided Report Build



**Course Code:** BIZNETGNRLRPRTBUILD  
**Program Level:** Basic  
**Field of Study:** Specialized knowledge

### Who should take this course?



This course is designed for BizNet users who will need real-time financial and operational reporting from their ERP system. Enhance the way you manage your reporting needs with BizInsight 7 and take advantage of the data management and optimization tools to maximize real-time reports.

### Learning Objectives



Upon successful completion of this course, you will have gone through:

- Working with your data for best practices in report writing
- How to create a simple report and review for accuracy
- The difference between a table and a function and when to use each
- How to use the BizInsight Query editor
- How to drilldown to supporting detail

### Agenda



#### Session 1

- Overview of BizInsight 7 product: the ribbon, the navigation pane, and the report body
- Navigation pane section and references to ERP specific views of the navigation tree
- Detailed discussion of the Query tool
- Overview of Functions and Data Tables and when to use
- Example exercise to build a sample Income Statement
- Example exercise to demonstrate drilldown capability
- Helpful Excel formulas and best reporting set-up practices

#### Session 2

- Review from session 1
- Discuss tables, lists, refresh, making lists preserve column/sort/filter layout and automatically fill down
- Build a dynamic Trial Balance to introduce combining lists together with functions
- Dynamic transaction data table exercise using the Data Range Properties feature
- Suggested best practices for checksums to validate totals and report completeness

## Course Details

### Duration

- Standard: Pre-recorded videos (One year subscription)
- Premium: Pre-recorded videos (One year subscription) with one 2-hour session
- Premium+: Pre-recorded videos (One year subscription) with two 2-hour sessions

### Materials Provided

- Pre-recorded videos and course guide

### Pre-Requisites

- None

### Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Hands-on: 60%

**Note:** Training is conducted on the client's environment. It is important that the client's environment has been tested.

## BizBroadcast Training



**Course Code:** BIZBRDCST  
**Program Level:** Basic  
**Field of Study:** Specialized knowledge

### Who should take this course?



This course is designed for BizNet users who need to distribute reports and data to internal and external users. Deliver data-driven reports in a variety of formats and share them with anyone, anywhere.

### Learning Objectives



Upon successful completion of this course, you will have gone through:

- Distributing reports created in Excel with BizInsight7
- Setting up automation for efficiency
- Leveraging Excel functionality for best practices

### Agenda



#### Session 1

- Overview and walk through of the ribbon and distribution tab
- How to preserve Excel formulas and paste values for BizInsight/XL Connect functions
- Departmental Report Distribution – Multiple Tabs Per Workbook Review Potential Issues in Passing Parameters and applying Row Suppression
- Distribute Multiple Financial Reports- Selective by Each Recipient
- Custom Distribution Lists with Access Only to Their Responsibility Areas
- More Customization for Distribution; Hiding / Deleting Sheets / Password
- Report Workbook: Review a Report Package
- Merging PDF Documents; Add a Cover Page and Written Analysis to the Reporting Package
- Report Scheduling

## Course Details

### Duration

- One 2-hour session (if purchased separately - included in BizInsight Training if purchased in the bundle)

### Materials Provided

- Course guide

### Pre-Requisites

- None

### Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Hands-on: 60%

**Note:** Training is conducted on the client's environment. It is important that the client's environment has been tested.

## BizInsight Training



**Course Code:** BIZINSIGHT  
**Program Level:** Basic  
**Field of Study:** Specialized knowledge

### Who should take this course?



This course is designed for BizNet users who will need real-time financial and operational reporting from their ERP system. Enhance the way you manage your reporting needs with BizInsight 5 and take advantage of the data management and optimization tools to maximize real-time reports.

### Learning Objectives



Upon successful completion of this course, you will have gone through:

- Working with your data for best practices in report writing
- How to create a simple report and review for accuracy
- The difference between a table and a function and when to use
- How to drilldown to supporting detail

### Agenda



#### Session 1

- Overview of BizInsight 5 product: the ribbon, the navigation pane, and the report body
- Navigation pane section and references to ERP specific views of the navigation tree
- Overview of Functions and Data Tables and when to use
- Example exercise to build a sample Income Statement
- Example exercise to demonstrate drilldown capability
- Helpful Excel formulas and best reporting set-up practices

#### Session 2

- Review from session 1
- Discuss tables, lists, refresh, making lists preserve column/sort/filter layout and automatically fill down
- Build a dynamic Trial Balance to introduce combining lists together with functions
- Dynamic transaction data table exercise using the Data Range Properties feature
- Suggested best practices for checksums to validate totals and report completeness

## Course Details

### Duration

- Standard: Pre-recorded videos (One year subscription)
- Premium: Pre-recorded videos (One year subscription) with one 2-hour session
- Premium+: Pre-recorded videos (One year subscription) with two 2-hour sessions

### Materials Provided

- Pre-recorded videos and course guide

### Pre-Requisites

- None

### Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Hands-on: 80%

**Note:** Training is conducted on the client's environment. It is important that the client's environment has been tested.

## XL Connect



**Course Code:** BZN-SVC-BZN-XLConnTrain

**Program Level:** Basic

**Field of Study:** Specialized knowledge

### Who should take this course?



This course is designed for XL Connect users who will need real-time financial and operational reporting from their ERP system. Enhance the way you manage your reporting needs with XL Connect and take advantage of the data management and optimization tools to maximize real-time reports.

### Learning Objectives



Upon successful completion of this course, you will have gone through:

- XL Connect training will provide you with a comprehensive understanding of working with your data for best practices in report writing.
- How to create a simple report and review for accuracy
- The difference between a table and a function and when to use
- How to use the BizInsight Query editor
- How to drilldown to supporting detail

### Agenda



#### Session 1

- Overview of XL Connect product: the ribbon, the navigation pane, and the report body
- Navigation pane section and references to ERP specific views of the navigation tree
- Detailed discussion of the Query tool
- Overview of Functions and Data Tables and when to use
- Example exercise to build a sample Income Statement
- Example exercise to demonstrate drilldown capability
- Helpful Excel formulas and best reporting set-up practices

#### Session 2

- Review from session 1
- Discuss tables, lists, refresh, making lists preserve column/sort/filter layout and automatically fill down
- Build a dynamic Trial Balance to introduce combining lists together with functions
- Dynamic transaction data table exercise using the Data Range Properties feature
- Suggested best practices for checksums to validate totals and report completeness

## Course Details

### Duration

- Premium: One 2-hour session
- Premium+: Two 2-hour sessions

### Materials Provided

- Resource and Task Guide

### Pre-Requisites

- None

### Delivery Methods

- Group Live: Up to 10 users
- Group Internet Based – Instructor Led: Up to 10 users

Hands-on: 60%

**Note:** Training is conducted on the client's environment. It is important that the client's environment has been tested.