This course is designed to teach you the essentials of using the Financial Report Writer to create and manage financial reports. In addition, this course teaches you how to create graphs, dashboards, and performance cards to provide insight into your organization's performance. You will use account groups, dimensions, and calculations to create reports for analyzing data, identifying trends, and providing audit-ready financials. You will also schedule reports for delivery and run reports together in a report group. Learning activities help you practice the skills taught.

This course will use Intacct Action as the user Interface.

### Class Details

<table>
<thead>
<tr>
<th>Audience:</th>
<th>This course is designed for accountants, accounting managers, controllers, and report writers who are new to the Financial Report Writer and need to build or customize financial reports.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prerequisite(s):</td>
<td>Ability to confidently navigate the Intacct system, as well good working knowledge of basic accounting and financial and statutory reporting.</td>
</tr>
<tr>
<td>Class Dates:</td>
<td>Monday, October 16 – Tuesday, October 17, 2017 9:00 AM – 5:00 PM both days</td>
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<tr>
<td>Breakfast, lunch, and breaks will be provided.</td>
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<tr>
<td>What You Need:</td>
<td>This is a hands-on course. Intacct provides a sample environment for the activities. For the course, you need:</td>
</tr>
<tr>
<td>• A wireless-enabled laptop (not a tablet) with a supported browser</td>
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<tr>
<td>CPE Credits:</td>
<td>• This course is eligible for 12 CPE credits</td>
</tr>
<tr>
<td>• The field of study is Computer Science</td>
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<td>• The delivery method is Group Live</td>
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<tr>
<td>Cost:</td>
<td>$985</td>
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</tbody>
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### Course Objectives

At the end of this course you should be able to:

- Create and filter a financial report
- Compare financial data across time periods and dimensions
- Perform calculations using financial and statistical data
- Create actual-to-budget financial reports
- Schedule reports and run report groups
- Create graphs, dashboards, and performance cards
### Course Topics

#### Running Financial Reports
- Types of reports
- What is a financial report?
- Financial Reports Library
- Running a financial report

#### The Power of Account Groups
- Chart of accounts
- Using dimensions in financial reports
- What are account groups?
- Out-of-the-box account groups

#### Creating Financial Reports
- Creating a financial report using account groups
- Appearance of rows
- Column settings
- Access to a financial report
- Formatting options

#### Comparing Financial Data
- Built-in reporting periods and offset
- Comparing columns by time periods
- Expanding columns by time periods
- Expanding rows by dimensions

#### Filtering by Dimensions
- What are dimension groups?
- Creating a financial report
- Filtering a financial report

#### Creating Account Groups
- Accounts structure type
- Group of Account Groups structure type
- Report filters

#### Adding Statistical Data
- Viewing statistical journals and statistical accounts
- Adding statistical journal entries
- Viewing statistical transactions

#### Performing Row and Column Calculations
- Statistical account groups
- Computation account groups
- Adding a row calculation
- Defining a column computation on the Computations tab
- Adding a column calculation
- Summarizing the amount of multiple columns
- Adding a percent of actual column

#### Creating Actual-to-Budget Financial Reports
- Viewing budget data
- Reporting options for budgets
- Creating actual-to-budget financial reports

#### Managing Financial Reports
- Using the Reports Center
- Report management options
- Creating and running a report group
### Course Topics

#### Creating Financial Graphs
- What are financial graphs
- Data series
- Period comparison

#### Creating Dashboards and Performance Cards
- Creating a dashboard
- Dashboard properties
- Component types
- Adding record, chart, report, and performance card components

### More Information

For questions regarding the pre-conference training courses being held at Advantage 2017, please contact advantage@intacct.com.

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