



UNIT4 ERP TRAINING

(FORMERLY AGRESSO BUSINESS WORLD)

Super User Training Course Catalogue

Embridge
Consulting
Enabling your digital future



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EMBRIDGE – YOUR TRAINING PARTNER

Training is a key factor in all successful Unit4 ERP (Agresso Business World) implementations, yet it is surprising how many organisations forget to include it when planning their entire project.

Do not just invest in software, invest in your people – your most important asset. If you don't make training and frequent communication with users a top priority, you will own a very expensive version of Excel.

Your people meet your business goals, drive your entire organisation, including the ERP software in which you have just invested lots of time, people, and money.

In training, there is no such thing as a silly question. All questions are welcome, indeed required. For any questions we may not know during the courses, we will find out the answers and get back to you.

We have a team of expert trainers across business system platforms providing a range of bespoke and standard training, based on your business processes, and delivered using a number of modalities including face-to-face classrooms, virtual classrooms, videos, quick cards and eLearning.

Using a blended learning approach, we provide your employees with a positive, engaging, and empowering learning experience.

STANDARD AND BESPOKE TRAINING COURSES

In addition to our standard courses (delivered at your site) and our public courses (delivered both Face-to-Face and Virtually), we offer bespoke/tailor made training for your end users - based on your exact requirements, U4BW environment, and your business processes. Designed around a business language that your employees understand, in-line with their skillset and job requirements.

Our engaging, positive and empowering training team deliver a wide range of services that cover the entire training lifecycle from the initial TNA (Training Needs Analysis), program and course development, training delivery and feedback.



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Record to Report (R2R)

R2R is a Unit4 terminology which represents a workstream that involves several Unit4 areas/modules, tasks, and business processes including entering, processing and reporting on relevant, timely and accurate data in the General Ledger.

Accounting & Financials	Covering the key Unit4 ERP finance concepts of cornerstones, setting up Unit4 ERP to create a new company/client from scratch to post transactions to the General Ledger.	1 day
Bank Reconciliation	Unit4 ERP Bank Reconciliation usage with importing bank statement, automatic & manual matching, match & cashbook maintenance, reconciliation confirmation & enquiries.	1 day
General Ledger	Covering all you need to know about General Ledger for Unit4 ERP. We take you through Journal entry, approval, recurring, reversal, templates, parking journals and Period/year end.	1 day

Procure to Pay (P2P)

P2P is a Unit4 terminology which represents a workstream that involves a number of Unit4 areas/modules, tasks, business processes that cover Purchasing activities of requesting, ordering, receiving, paying for and accounting for goods and services.

Purchasing and Accounts Payable	Covering AP and Purchasing. Setup of Suppliers, registering/posting/maintaining Invoices and credit notes, matching, using document archive, payment run/remittance, reversals and supporting enquiries. On the Procurement side: products, purchasing (Requisitions to raising/amending Purchase Orders), workflow intro and goods receipting.	2 days
Fundamentals of Procure to Pay (P2P)	A high-level demonstrational course covering the P2P cycle of events including a description of the supplier master file, raising a requisition, approving a requisition, enquiring on purchase orders, goods receipting and registering an incoming invoice.	1 day

Course Name	Description	Duration
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Sales to Cash (S2C)

S2C is a Unit4 terminology which represents a workstream that involves a number of Unit4 areas/modules, tasks, business processes that cover tasks for creating and processing customer sales orders and invoices for sales of goods and services and the customer payments for invoices.

Customers & Sales / Accounts Receivable (AR)	Covering Sales overview and AR. Setup: products, raise sales orders (desktop & web) & invoicing, free-text invoicing, credit notes, workflow intro and supporting enquiries. For AR: Customers, free-text and posting customer invoices and credit notes, matching, credit control/payment follow-up, record payments and reversals.	2 days
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Fundamentals of Sales to Cash (S2C)	A high-level demonstrational course covering a description of the customer master file, raising sales orders, approving a sales order, invoicing and payments.	1 day
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Asset Management

Asset management is a Unit4 terminology which represents a workstream that involves a number of Unit4 areas/modules, tasks, business processes that cover the processes of purchasing, capitalising, depreciating, maintaining, upgrading, and disposing of assets.

Fixed Assets	Covering the running of Fixed Assets in Unit4 ERP from creating assets, capitalising, depreciation (and simulations), additions/revaluations/sales & disposals, changes and corrections, reversals, supporting enquiries, and year end processes.	1 day
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Estate and Asset Management (previously Field Force)	Designed to introduce you to use the standard Unit4 ERP Field Service Management functionally and provide an overview of its links to other Unit4 ERP modules. It covers the setup required to create service orders, carrying out service orders using U4BW mobile and web, and Invoicing customers.	1 day
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Budget to Control

B2C is a Unit4 terminology which represents a workstream that involves a number of Unit4 areas/modules, tasks, business processes that cover the processes of budgeting, forecasting and reporting (against actuals from the General Ledger for example).

Planner Introduction	Covering an overview of Unit4 ERP Planner module and processes. Understanding and using timeframes, versions, period links, comparisons, entering planner transactions, and an overview of reporting and Excelerator.	1 day
Business Books (Previously Budget Books)	Covering an introduction, how to build and use Unit4 Business Books. Getting ready for, setting up, planning and using Business Books.	1 day
Budgeting & Forecasting	Advanced course and extension to Planner Intro with more hands-on and exercises to include setting up timeframes, period links, versions, comparisons, entering planner transactions, fixed registers setup, forecasting setup, budgets and balance tables setup and updating, import transactions, using Excelerator, and planner workflow overview and usage.	2 day

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Reporting

Reporting is a Unit4 terminology which represents a Workstream that involves a number of Unit4 areas/modules, tasks, business processes that cover the process of producing enquiries, reports and statements which include an organization's financial status to management, budget holders and investors.

Reporting in Desktop	Covering an introduction to all aspects of reporting, including basic and set up enquiries. The course covers a comprehensive description of the traditional Desktop Browser and how to set up its powerful reporting capabilities. The course also covers Balance Tables for financial reporting and Information Pages for setting up dashboards as startup pages.	1 day
Reporting in Web	Covering an introduction to all aspects of enquiry and reporting windows in Web. This course covers a comprehensive introduction to Web's new reporting tool 'Information Browser' and analytic tool 'Analyzer'.	1 day
Balance Tables	Create new balance tables and populate the table with data. Create and generate data warehouses, reporting with balance tables.	0.5 day
Excelerator Basics	This course is an introduction to Excelerator. You will learn how to create new reports based on browser enquiries. How to format the reports and data. Creating crosstab reports and the use of control sheets and parameters.	1 day
Excelerator Advanced	Creating report templates and management report packs, multi-level sub-tototalling and postback.	1 day
SQLBasics	Written by a non technical person, this course is designed to educate finance type users to the basics of SQL to create data enquiries. This is a reporting course, introducing the Report Engine from an ARC/Xtra perspective as well migrating existing ARC report to new Xtra format.	1 day
ARC/Xtra Reporting	This is a reporting course, introducing the Report Engine from an ARC/Xtra perspective as well migrating existing ARC report to new Xtra format.	2 days
Workspace	Workspace is a new Experience Pack (EP) for MS7 that makes Unit4 ERP personal. It allows different users to setup a reporting dashboard that provides easy to use reports and KPIs at a glance – which can be drilled-down into for details and thorough analysis..	1 day

Course Name	Description	Duration
Supporting functions		
Supporting functions is a Unit4 terminology which represents a workstream that involves a number of Unit4 areas/modules, tasks, business processes that cover all Unit4 ERP modules that are used to support and maintain Unit4 ERP and the running and configuration of your system.		
System Administration	Covering a review of Unit4 ERP cornerstones and their management, system management monthly and non-monthly, managing and understanding workflow, reports, resources, users, roles, data control, batch input, IntellAgent overview, Flexi-Fields, forms, document archive and dynamic zoom.	2 days
Workflow Basics	Introduction to Unit4 ERP workflow and its importance, its main elements/cornerstones of process definition, element types, distribution rules, users and roles, creating a basic workflow, and an introduction to managing workflow.	1 day
Workflow Advanced	This course builds on the Workflow Basics course and include master file workflows, adding multi-level approvals via OR-Splits and/or distribution rules priorities, adding deadlines, escalations and email alerts.	1 day
IntellAgent	Understanding the types of IntellAgent (IA), how used/ integrated within Unit4 ERP, creating simple/personal IA alert and advanced IA, understand IA directory polling, amendment logging, SQL with IA, AG16s & basic enquiries.	1 day
Flexi-fields & Forms	Designed for users who need to create and maintain flexi-fields and forms in support of the various workstreams.	1 day
Data Import	Designed to take users through different data import options covering BIF (Batch Input Formatter), Dataload, Flexi-Fields, Excel/Excelerator, and a basic introduction to BIF9 Web services*.	1 day
Technical Foundation Course	Introduction to and Installing Milestone 7 using the demo database, UK Product Installation, Testing UBW is working as expected, Report Engine Installation (Server and Client), SQL Server Tips, Web Server Optimisation Tips, Business Server Optimisation Tips, Maintenance Mode, IntellAgent.	1 day
MS7 Differences	Designed for users to gain an overview of some of the features of UBW Milestone 7 (MS7). Including Information Browser & Analyzer, Project Workspaces, Dynamic Forms, Communities & Knowly, UBW Web - Procure to Pay (P2P) end-to-end and Web – Core differences.	1 day

Course Name	Description	Duration
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Supporting Functions cont....

Modeler and Structures	This course provides a thorough understanding how to build structures in Unit4 ERP and displaying and maintaining them in Modeler. This course is designed for customer super users and assumes an in-depth knowledge of BW functionality including a solid understanding of the Unit4 ERP attribute and relation setup.	1 day
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Project Lifecycle

Project lifecycle is a Unit4 terminology which represents a workstream that involves several Unit4 areas/modules, tasks, business processes that cover the process of setting up, planning, executing, controlling, and closing the work of a team based on internal/external projects - to achieve project reporting goals, success and invoicing customers for external projects

Projects (PCB) Basics	Covering an introduction and understanding of Unit4 ERP Projects (PCB module), integration with other Unit4 ERP modules, structures, basic project setup, using U4BW Web for Project, introduction to Project workflow, and standard Project enquiries.	1 day
Project Timesheets	Learn how to build, maintain and setup timesheet entry within Unit4 ERP from the common setup all the way through to entry, processing time and posting the time to the General Ledger.	1 day
Project Billing	Learning the setup behind the PCB invoice process in Unit4 ERP & understanding how to manage the invoice process. From an overview to creating the invoice and additional tools for PCB invoicing this course will cover all you need to know about setting up and using PCB Invoicing.	1 day

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HR

HR as a workstream is a Unit4 terminology which involves a number of Unit4 areas/modules, tasks, business processes that covers the entire hire to retire process, enabling an organisation to effectively recruit, develop people and managing their performance.

HR Employee	This training course aims to provide you with an in-depth understanding of Unit4 Human Resources, that is, the elements which make up the HR module of Unit4 ERP, the tools available which enhance the functionality of the HR Module and how HR integrates with other modules in Unit4 ERP.	2 days
Training and Competence Management	This is a training course to consider the initial design and setup of the Training administration module and its basic operation. Including : Course setup, Course scheduler, Competence, Gap analysis, Assigning course participants, Course maintenance and completion, evaluation forms, Web functionality, Enquiries and reporting.	1 day
Expenses	Working through the various ways that expenses can be setup in Unit4 ERP and understanding the why / how of each process. Working through the setup and maintenance of expenses to entering them in the various different screens within the web client.	1 day
Absences	Designed to look at the business processes, related system requirements, and business benefits for the Absence module. You will gain an understanding of the basic structure of the Unit4 ERP Absence Management module and its interaction with other components of Business World.	1 day
HR Reporting	This course is designed to gain an understanding of the HR Reporting capabilities. The course looks at Enquiry and Reporting functionality in both Web and Desktop.	1 day web 1 day Desktop
People Planner	Please contact for further details...	1 day

Course Name	Description	Duration
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Payroll

Payroll as a workstream is a Unit4 terminology which involves a number of Unit4 areas/modules, tasks, business processes that looks at gathering employee time information for a selected time period, managing benefits & deductions, and distributing employee pay for that time period.

Maintaining Payroll	Starting with personnel registration, employment, relations configuration and setup. Resource rate and balance handling, new starters and leavers, payment and deductions, payment inputs, tax and NIC, student loans, court orders, maternity, adoption and paternity, sickness and absence payments, value references, value reference rates, PD formulas.	2 days
Processing Payroll	Covering the overview of personnel readiness for Payroll & the input elements pre-payroll running. The processing of Payroll, payments, BACS, adjustments, period end routines & reporting on the new Payroll transactions.	1 day
Payroll Reporting	Please contact for further details...	1 day
Yearend Payroll	Designed to provide you with all the steps required to process your Unit4 ERP (Agresso) UK Payroll module from one Payroll year to the next. With focus on closing your year end successfully, final transmissions, reconciliation and reporting. The loading and setup of the new Payroll year and the understanding of the new Payroll year elements.	1 day
Yearend Payroll Refresher	A 2-hour virtual update session for those already familiar with Payroll.	2 hours

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<https://embridgeconsulting.com/training-booking-terms/>

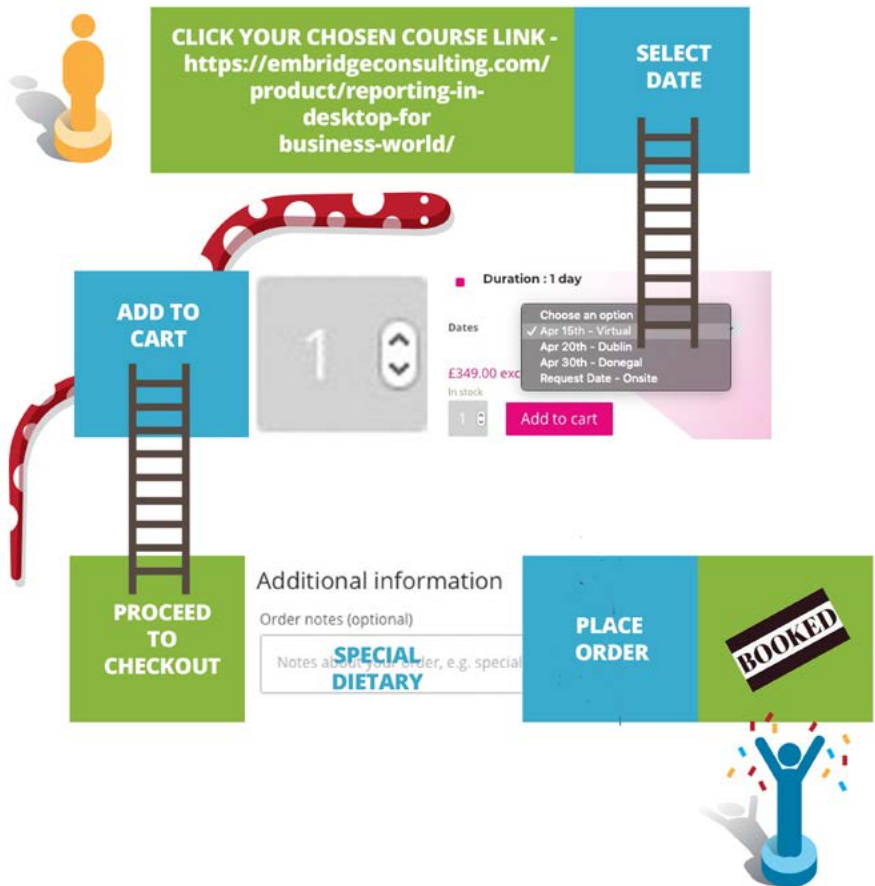
Embridge Consulting reserves the right to cancel or reschedule courses dependent on the number of bookings received. In such circumstances, you will be offered alternative dates. We will not be liable for any loss or expense of the customer arising out of such a cancellation.

FURTHER INFORMATION

COURSE BOOKINGS:

Once you have selected your course choice, training can be arranged either on site, at one of our training hubs located in Bristol or Kent or virtually.

Many of the public courses will be available in our training schedule open to all Unit4 customers which can be viewed [online](#).



Or book via ur online [booking form](#) or alternatively you can contact the training team by [email](#) or by telephone on +44 (0)1474 555505.



Digital Transformation

For any business you need to be thinking constantly about how to work smarter, how to take advantage of the latest technologies that are available to you. Our digital transformation service not only provides the strategic advice that organisations so often need but will support the selection & implementation of the change ensuring real benefits are delivered.



Project Management

Effective project management is at the heart of any successful project. If your business is about to embark on any change or transformation project – our proven methodology and exceptional project managers could be exactly what you need.



Learning & Development

It is surprising how many businesses forget or do not appreciate the impact a mature learning environment can have on the productivity of their staff. Considering the training resources that are available to a business, the learning platform that is required to support this is critical to the future generation of our businesses. We provide everything from super user classroom training, public courses, bespoke end user training, eLearning through to hosted learning options. Providing engaging learning solutions meeting the needs of a flexible working environment, spread across multiple locations, is crucial in preparing businesses for the future.



ERP Implementation Consultancy

Our ERP Consultancy service will ensure project success, from solution design, implementation to go-live and then beyond – our accredited consultant service gives you peace of mind and the added reassurance your system is being managed by experts.



Unit4 Application Support

Our application support service provides you with a tailored support offering that includes remote consultancy, application support, outsourced training services, technical managed services and cloud hosting. With a team of dedicated consultants covering all Unit4 ERP (Agresso) modules, this offers clients and their internal support teams a flexible and cost effective way of managing your Unit4 ERP solution. Offering pro-active advice in relation to future developments, we will make sure your investment continues to reap the benefits available as new modules are released and new functionality is introduced.



Smart Solutions

Embridge Consulting is able to offer a unique alternative driving real value from your Unit4 ERP investment with our ACT Developed Smart Solutions..

Embridge Consulting was founded in 2009 as an independent consultancy advising businesses who were looking to embark on a change programme where efficiencies and cost savings can be delivered using modern technology.

We work with clients across multiple sectors to understand, design and deliver pragmatic technology and learning solutions along with robust business change programmes. We have the requisite business, project and technical skills to exceed your expectations.

Embridge Consulting has a strategic relationship with Unit4 working closely with both the regional and Global Leadership teams at Unit4, ensuring our services continues to provide value to the Unit4 client base.

GET IN TOUCH

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