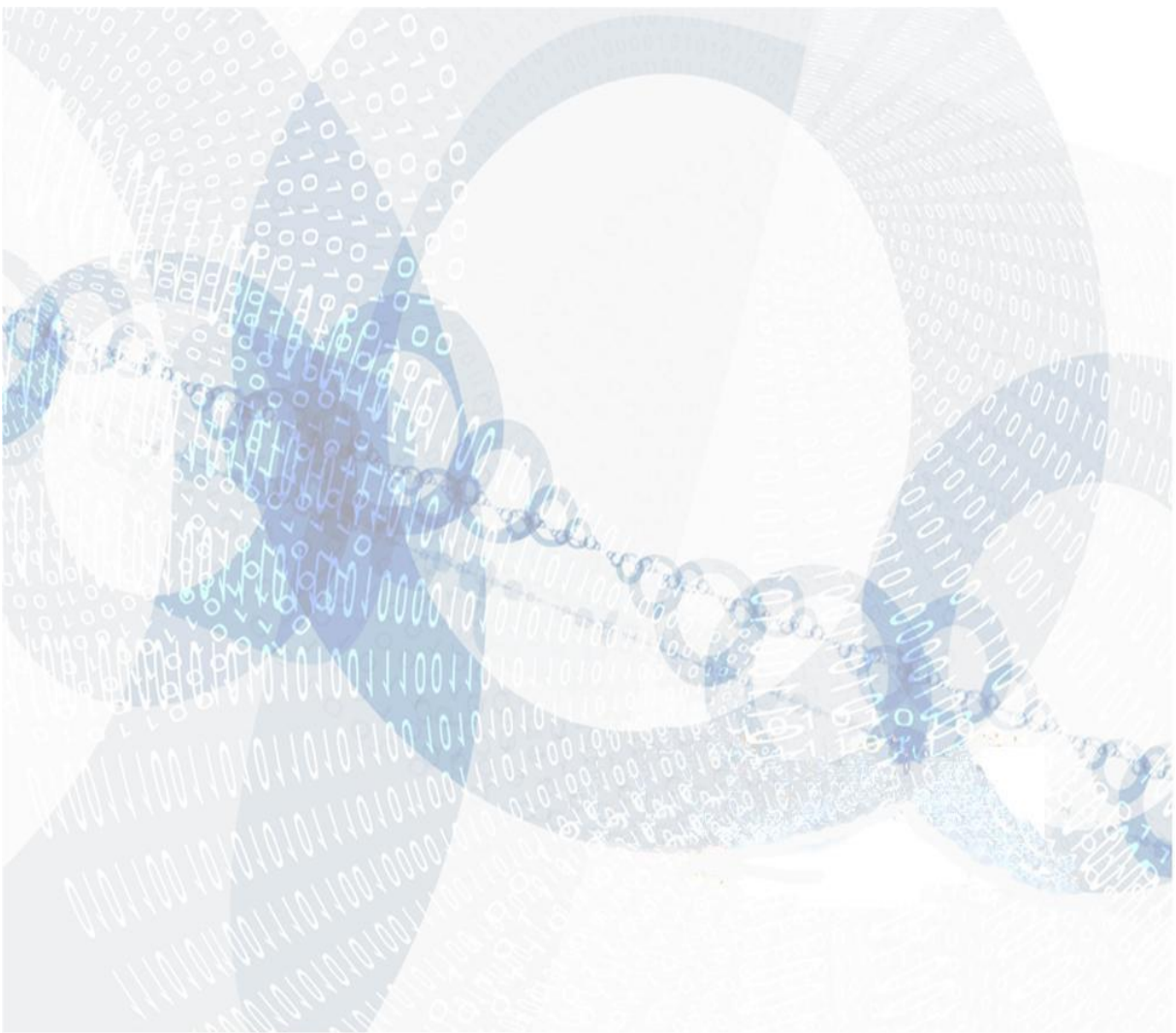


# Advanced Integrators Knowledge Center

## Course Catalog



**Microsoft Office ..... 5**

**Excel ..... 5**

- Excel Fundamentals – 3 Hours \$175 ..... 5
- Excel Data Analysis Tools – 3 Hours \$175 ..... 5
- Excel Select Functions/Formulas – 3 Hours \$175 ..... 5
- Excel Sorting, Filters, & PivotTables – 3 Hours \$175 ..... 5
- Excel Creating & Enhancing Charts – 3 Hours \$175 ..... 5
- Excel Advanced Charting Techniques – 3 Hours \$175 ..... 5
- Excel Database Functionality – 3 Hours \$175 ..... 6
- Excel Worksheet Functionality – 3 Hours \$175 ..... 6
- Excel Working with Macros & Controls – 3 Hours \$175 ..... 6

**Word ..... 6**

- Word Creating & Enhancing Tables – 3 Hours \$175 ..... 6
- Word Mail Merge – 3 Hours \$175 ..... 6
- Word Document Styles – 3 Hours \$175 ..... 6
- Word Columns & Drawing Features – 3 Hours \$175 ..... 6
- Word Formatting Techniques – 3 Hours \$175 ..... 6
- Word Template Design – 3 Hours \$175 ..... 7
- Word Forms & Macros – 3 Hours \$175 ..... 7
- Word Working with Large Documents – 3 Hours \$175 ..... 7
- Word Document Sharing & Research – 3 Hours \$175 ..... 7

**PowerPoint ..... 7**

- PowerPoint Charts, Graphs, & Embedded Objects – 3 Hours \$175 ..... 7
- PowerPoint Delivering Powerful Presentations – 3 Hours \$175 ..... 7
- PowerPoint Drawing Tools – 3 Hours \$175 ..... 7
- PowerPoint Enhancing Presentations – 3 Hours \$175 ..... 8
- PowerPoint Multimedia Integration – 3 Hours \$175 ..... 8

PowerPoint Template Design & Interaction – 3 Hours \$175..... 8

**Outlook..... 8**

Outlook Fundamentals – 3 Hours \$175 ..... 8

Outlook Calendars, Contacts, & Tasks – 3 Hours \$175 ..... 8

**Microsoft Dynamics GP..... 9**

General Navigation – 3 Hours \$275..... 9

System Administration – 3 Hours \$275..... 9

Company Setup – 3 Hours \$275..... 9

General Ledger Basic – 3 Hours \$275..... 9

General Ledger Advanced – 3 Hours \$275..... 9

Bank Reconciliation – 3 Hours \$275..... 9

Payables Management Processing – 3 Hours \$275..... 9

Payables Management Advanced Features – 3 Hours \$275 ..... 9

Purchase Order Processing – 3 Hours \$275 ..... 9

Accounts Receivable Processing – 3 Hours \$275 ..... 10

Accounts Receivable Advanced Features – 3 Hours \$275..... 10

Sales Order Processing – 3 Hours \$275..... 10

Inventory Setup – 3 Hours \$275 ..... 10

Inventory Daily Processes – 3 Hours \$275..... 10

Advanced Distribution – 3 Hours \$275..... 10

Fixed Assets Setup – 3 Hours \$275..... 10

Fixed Assets Procedures – 3 Hours \$275..... 10

Payroll Setup/Admin – 6 Hours \$495 ..... 10

Payroll Daily Processes – 6 Hours \$495..... 11

Human Resources with Payroll Setup/Admin Basic– 6 Hours \$495..... 11

Human Resources with Payroll Setup/Admin Advanced– 6 Hours \$495 ..... 11

Human Resources with Payroll Daily Processes Maintenance – 6 Hours \$495..... 11

Human Resources with Payroll Daily Processes Procedures – 6 Hours	\$495	11
Seldom Used Features	3 Hours \$275	11
Reconciling and Troubleshooting	3 Hours \$275	11
Professional Service Tools Library & Other tools	3 Hours \$275	11
Year End Closing with Basic Reporting – 3 Hours	\$275	11
Project Series Setup – 3 Hours	\$275	12
Project Series Maintenance I – 3 Hours	\$275	12
Project Series Maintenance II – 6 Hours	\$495	12
Project Series Daily Procedures– 6 Hours	\$495	12
Print Boss – 3 Hours	\$275	12
SmartList	3 Hours \$275	12
SmartList Builder	6 Hours \$495	12
Integration Manager I – 6 hours	\$495	12
Integration Manager II – 6 hours	\$495	12
Management Reporter Overview (For FRx Users)	3 Hours \$275	13
Management Reporter	6 Hours \$495	13
FRx Basics I – 6 Hours	\$495	13
FRx Basics II: – 6 Hours	\$495	13
FRx Advanced I – 6 Hours	\$495	13
FRx Advanced II – 6 Hours	\$495	13
Report Writer Basics I – 3 Hours	\$275	13
Report Writer Basics II – 6 Hours	\$495	13

**Cancellation and Refund Policies..... 14**

**Class Times ..... 15**

**Who We Are ..... 15**

**How We Operate..... 15**



# COURSES

## MICROSOFT OFFICE

All of the following Office courses are available for the latest version available.

## EXCEL

### EXCEL FUNDAMENTALS – 3 HOURS ..... \$175

Understanding Excel, Navigating a Worksheet, Keyboard Shortcuts, Creating and Saving a Workbook, Entering and Editing Data, Arranging Cells, Creating Formulas, Formatting Cells, Printing and Previewing, Managing Workbooks

### EXCEL DATA ANALYSIS TOOLS – 3 HOURS ..... \$175

Data Validation Techniques, Conditional Formatting, Using Goal Seek, Scenario Management, Using Solver, Conditional Sum Wizard, Data Modeling & Sensitivity Analysis Overview, The One-Variable Data Table, How to Create a One-Variable Data Table, How to Modify a One-Variable Data Table, Adding Formulas, Data Table Formatting, The Two-Variable Data Table, Using Charts to Enhance Data Tables, Working with External Data Sources, Importing Data, Importing Web Queries, Importing Database Queries.

### EXCEL SELECT FUNCTIONS/FORMULAS – 3 HOURS ..... \$175

Formula Construction & Function Wizard, Selected Functions: Database Functions, Date & Time Functions, Engineering Functions, Financial Functions, Information Functions, Logical Functions, Lookup Functions, Math and Trigonometry Functions, Statistical Functions, Text Functions, User-Defined Functions.

### EXCEL SORTING, FILTERS, & PIVOTTABLES – 3 HOURS ..... \$175

Overview of Basic Sorting, Complex Sorting, Using AutoFilters, Custom Criteria AutoFilters, Advanced Filters, Pivot Tables Overview, Creating PivotTables, Analyzing Data with PivotTables, Formatting PivotTables, PivotTable Charts, PivotTable Toolbar, Adding Calculated Fields, Using Page Fields.

### EXCEL CREATING & ENHANCING CHARTS – 3 HOURS ..... \$175

Chart Basics, Rules for Successful Charting, Chart Types, Chart Wizard, Editing & Enhancing Charts, Formatting Chart Elements, Chart Toolbar, Printing Charts, Copying Charts to MS-PowerPoint, Charts & Drawing, Drawing Toolbar, AutoShapes and ClipArt.

### EXCEL ADVANCED CHARTING TECHNIQUES – 3 HOURS ..... \$175

Chart Axes Scaling, Category Axes Scaling, Value Axes Scaling, Using a Secondary Axis, Creating Combination Charts, Adding Trend Lines, Adding Error Bars, Troubleshooting Suggestions.

**EXCEL DATABASE FUNCTIONALITY – 3 HOURS ..... \$175**

Database Overview, Automated Data Entry Forms, Creating Subtotals, Groups & Outlines, Consolidating Worksheets, Parsing Data, Transpose Command, Database Functions/Formulas, Working with Lists, Performing Database Queries in Microsoft Access from Excel.

**EXCEL WORKSHEET FUNCTIONALITY – 3 HOURS ..... \$175**

Worksheet Linking, File Linking, Object Linking, Troubleshooting Linked Data, Workbook Workspaces, Auditing Worksheets, Auditing Toolbar, Adding Comments, Importing & Exporting Data, Data Protection, Tracking Changes.

**EXCEL WORKING WITH MACROS & CONTROLS – 3 HOURS ..... \$175**

Macro Overview, Building & Recording Macros, Enhancing Macros, Editing & Updating Macros, Creating Macro Icons, Creating Macro Toolbars, Worksheet Controls, Creating & Enhancing Forms, Control Toolbar.

**WORD**

**WORD CREATING & ENHANCING TABLES – 3 HOURS ..... \$175**

Create Tables, Table Navigation, Table Formatting, Setting Tabs in Tables, Table Headings, Tables Toolbar, Working with Borders, Sorting Information, Performing Calculations, Adding Charts/Graphs, Inserting MS-Excel Data, Troubleshooting Tables

**WORD MAIL MERGE – 3 HOURS ..... \$175**

Mail Merge Setup, Creating a Mail Merge Document, Mail Merge Data, Mail Merge Toolbar, Using Excel/Access as Data Source, Create Mailing Labels, Create Envelopes, Using Merge Fields, Sorting Mail Merge Data, Filtering Mail Merge Data

**WORD DOCUMENT STYLES – 3 HOURS ..... \$175**

Style Basics, Defining & Creating Styles, Style Names & Options, Updating Styles, Deleting Styles, Transferring Styles between Documents, Merging Styles, Troubleshooting Styles, Styles & Paragraph Numbering, Outline Numbering, Styles & Bullets, Using List Styles, Styles Tips & Tricks

**WORD COLUMNS & DRAWING FEATURES – 3 HOURS ..... \$175**

Creating Columns, Column Formatting, Column Navigation, Troubleshooting Columns, Using Drawing Toolbar, Drawing Canvas, Inserting & Formatting Clipart/Pictures, Using AutoShapes, Creating WordArt, Creating Watermarks

**WORD FORMATTING TECHNIQUES – 3 HOURS ..... \$175**

Paragraph Indents (left, right, hanging, first line), Ruler Settings, Tab Setting (left, right, center, decimal, bar), Line Formatting (spacing, line breaks, non breaking spaces, line numbers), Hyphenation, Headers & Footers, Section Breaks, Borders & Shading Options, Borders & Shading Toolbar

**WORD TEMPLATE DESIGN – 3 HOURS..... \$175**

Creating Templates, Modifying & Formatting Templates, Using AutoText, Working with Toolbars, Adding Icons to Existing Toolbars, Creating New Toolbars, Copying Toolbars to other Templates, Using Fields in Templates

**WORD FORMS & MACROS – 3 HOURS ..... \$175**

Using Macros to Automate Tasks, Creating Macros, Running a Macro, Editing a Macro, Creating Forms, Form Design, Form Fields, Text Fields, Drop-down Fields, Forms Toolbar, Completing Forms

**WORD WORKING WITH LARGE DOCUMENTS – 3 HOURS ..... \$175**

Using large documents features, such as: Tables of Contents, Table of Contents Styles, Outline View, Document Map, Table of Figures, Table of Authorities, Footnotes, Endnotes, Cross-References, Bookmarks and Index Entries, Outline View & Toolbar, Working with Subdocuments

**WORD DOCUMENT SHARING & RESEARCH – 3 HOURS ..... \$175**

Tracking Changes & Revisions, Reviewing Toolbar, Reviewing Pane, Accepting/Rejecting Changes, Merging Tracked Changes, Troubleshooting Tracked Changes, Using Comments, Highlighting Text, Document Versions, Formatting & Editing Restrictions, Document Security, Performing Research (Reference Books, Language Translation, Thesaurus, Reference Sites), Conducting File Search, Using Help Resources.

## **POWERPOINT**

**POWERPOINT CHARTS, GRAPHS, & EMBEDDED OBJECTS – 3 HOURS..... \$175**

Creating Organization Charts, Formatting Organization Charts, Working with Data Charts, Formatting Data Charts, Inserting Excel Charts, Enhancing Charts & Chart Content, Object Linking & Embedding to Other Applications, Adding Diagrams, Diagrams Toolbar, Working with Flowcharts

**POWERPOINT DELIVERING POWERFUL PRESENTATIONS – 3 HOURS ..... \$175**

Effective Presentation Recommendations: What and Why and When and How and Where and Who, Knowing Your Audience, Achieving a Balanced Presentation, Bringing Your Data to Life with Multimedia Choices, Selecting the Correct Chart Type, Optimizing Color & Text in Your Presentations, Using the Best Medium for Your Message, Delivery Recommendations, Audience Participation Tips & Tricks, Sharing & Distributing Presentations, Presentation Security

**POWERPOINT DRAWING TOOLS – 3 HOURS ..... \$175**



Drawing Tools Overview, Drawing Toolbar, The Draw Menu Elements, Working with & Aligning Objects, Inserting & Formatting ClipArt/Photographs, Formatting Pictures, Using AutoShapes, Creating WordArt, Working with Diagrams, Working with Color Combinations, Useful Drawing Tips, Adding Shadows and 3-D Effects, using Microsoft Clip Organizer

**POWERPOINT ENHANCING PRESENTATIONS – 3 HOURS ..... \$175**

PowerPoint Views, Creating Slide Transitions, Animating Slide Content, Custom Animations, Creating Self-Running Presentations, Adding Notes During Presentations, Exporting Presentations To Word/HTML, GIF & Flash Animation Support

**POWERPOINT MULTIMEDIA INTEGRATION – 3 HOURS..... \$175**

Multimedia Formats, Design & Size Considerations, Adding Music & Sound, Playing a CD During Presentations, Adding Movies & Animation, recording Narration, Rehearsing Delivery, Controlling Media Options, Locating Multimedia Content, Packaging & Distributing Presentations on CD

**POWERPOINT TEMPLATE DESIGN & INTERACTION – 3 HOURS..... \$175**

Template Overview, Design Elements, Creating Templates, Working with Slide Masters, Notes Masters and Handout Masters, Enhancing Template Design, Protecting Templates Design, Distributing Templates, Using Color Schemes, Using Animation Schemes, Creating Interactive Presentations

## **OUTLOOK**

**OUTLOOK FUNDAMENTALS – 3 HOURS..... \$175**

Understanding Layout and Navigation, Sending and Receiving Mail, Message Options, Replying to Email, Forwarding Email, Email Attachments. Managing Email through Search Folders, Find and Advanced Find, Creating Folders, Moving Mail and Deleting Email. Setting Flags and Reminders and Out of Office Assistant.

**OUTLOOK CALENDARS, CONTACTS, & TASKS – 3 HOURS ..... \$175**

Explore Layout and Navigation Options, Setting Up Your Work Week, Creating Appointments, Recurring Meetings and Appointments, Scheduling a Meeting, Planning a Meeting, Editing Appointments and Meetings, Responding to a Meeting Request, Working with Multiple Calendars, Creating and working with Group Schedules, Creating and Editing Contacts, Send Mail Messages to Contacts, Emailing VCards, Searching, Organizing and Filtering, Merging Contacts, Creating and Working with Tasks, Completing Tasks, Changing the Order of and Filtering Tasks, Assigning Tasks to Others and Tracking Tasks, Assigning Categories to Outlook Items, Sharing Calendars, Contacts, and Tasks.

## MICROSOFT DYNAMICS GP

GENERAL NAVIGATION – 3 HOURS ..... \$275

Navigation -Advanced Lookups, Home Page, User Preferences, SmartList, Reports & Inquiries, Letter Writing Assistant

SYSTEM ADMINISTRATION – 3 HOURS..... \$275

User Setup, User Security, Field Level Security, Activity Tracking, Business Alerts, Named Printers, Macros, Creating a Company, Tips & Troubleshooting

COMPANY SETUP – 3 HOURS ..... \$275

Setup for GL, AP, AR, Inv, SOP & POP, Setup Checklists, Posting Setup, Account Level Security, User Setup, User Access

GENERAL LEDGER BASIC – 3 HOURS ..... \$275

Posting Accounts, Fixed Allocation Accounts, Variable Allocation Accounts, Unit Accounts, Account Segments, Daily Procedures

GENERAL LEDGER ADVANCED – 3 HOURS ..... \$275

GL Data Flow and Tracing Transactions, Multi-Dimensional Analysis, Excel Based Budgeting, Intercompany Processing, Maintaining GL Records, Inquiry and SmartList, Reports

BANK RECONCILIATION – 3 HOURS ..... \$275

Checkbook Setup/Maintenance, Bank Transaction Entry, Bank Transfers, Bank Deposit/Receipts, Bank Reconciliations, Maintaining Records, Inquiries, SmartList and Reporting

PAYABLES MANAGEMENT PROCESSING – 3 HOURS ..... \$275

Vendor Setup, Vendor Classes, Invoice Entry, Debit/Credit Memo Entry, Check Printing, Maintaining Records, Inquiries, SmartList and Reporting

PAYABLES MANAGEMENT ADVANCED FEATURES – 3 HOURS..... \$275

Posting Accounts Setup, Transaction Flow, Scheduled Payments, Intercompany Transactions, Refund Checks, Maintaining Records, Inquiry, SmartList and Reports

PURCHASE ORDER PROCESSING – 3 HOURS ..... \$275

PO Entry, PO Receipts, PO/Invoice Match, Maintaining Records, Inquiry, SmartList and Reports

**ACCOUNTS RECEIVABLE PROCESSING – 3 HOURS ..... \$275**

Customer Setup, Customer Classes, Invoice Entry, Credit Memo Entry, Cash Receipts Entry, Maintaining Records, Inquiry, SmartList and Reports

**ACCOUNTS RECEIVABLE ADVANCED FEATURES – 3 HOURS..... \$275**

Posting Accounts Setup, Transaction Flow, Schedule Payments, National Accounts, Refund Checks, Maintaining Records, Inquiry, SmartList and Reports

**SALES ORDER PROCESSING – 3 HOURS ..... \$275**

SO Entry, Allocating Sales Orders, Picking/Packing, Maintaining Records, Inquiry, SmartList and Reports

**INVENTORY SETUP – 3 HOURS ..... \$275**

Inventory Control Setup, Posting Accounts, Unit Of Measure Schedules, Price Levels/Groups, Item Classes, Item Setup, Transaction Flow

**INVENTORY DAILY PROCESSES – 3 HOURS ..... \$275**

Transaction Entry, Transfer Entry, Stock Counts, Use of Serial/Lot Numbers, Maintaining Records, Inquiries, SmartList and Reporting

**ADVANCED DISTRIBUTION – 3 HOURS ..... \$275**

SOP/POP Link, SOP Workflow for Complete Fulfillment Processing, PO Generator, Quantity Available to Promise, Advanced Picking, Maintaining Records, Inquiries, SmartList and Reporting.

**FIXED ASSETS SETUP – 3 HOURS ..... \$275**

Fixed Asset Setup, Fixed Asset Calendars, Account Groups, Purchase Posting Accounts, Class Setup, Book Set, Optional Setups, Inquiry, SmartLists and Reports

**FIXED ASSETS PROCEDURES – 3 HOURS ..... \$275**

Adding Assets, Adding Asset Book Record, Linking Assets to AP Purchases, Depreciation, Projections, Depreciate One or Many Assets, Maintaining Records – Transfers, Retirements, Etc., Inquiry, SmartLists and Reports, Period End Processing

**PAYROLL SETUP/ADMIN – 6 HOURS ..... \$495**

Payroll Setup Options, Payroll Posting Accounts, Department Setup, Position Setup, Pay Codes and Types, Deduction Codes and Sequencing, Local Tax Codes, Unemployment Tax, Payables Integration, Direct Deposit, Routines/Utilities

**PAYROLL DAILY PROCESSES – 6 HOURS ..... \$495**

Employee Maintenance, Payroll Transaction Entry, Build Payroll Checks, Calculate Checks, Print Checks, Generate ACH File, Void Payroll Checks, Payroll Month-End

**HUMAN RESOURCES WITH PAYROLL SETUP/ADMIN BASIC– 6 HOURS ..... \$495**

Integration Overview, Human Resources Preferences (System and User Setup), Payroll Preferences, Organization Setup, HR & Payroll Benefits and Deductions Setup, Payroll Setup: Earnings Codes, Garnishments, Deduction Sequence, Taxes, Pay Codes, etc., Payables Integration, HR Attendance Setup, Direct Deposit, Posting Accounts.

**HUMAN RESOURCES WITH PAYROLL SETUP/ADMIN ADVANCED– 6 HOURS ..... \$495**

Other HR Setup: Extra Fields, User Defined Fields, Interview, Orientation, Property, Skills, Training, Tests, Salary Matrix, Position/Paycode, Termination, etc., Routines, Letters, Utilities.

**HUMAN RESOURCES WITH PAYROLL DAILY PROCESSES MAINTENANCE – 6 HOURS ..... \$495**

Employee Maintenance *including* - Employee I-9, Record Additional Position History, Employee Pay Codes & Time Codes, Employee Vacation & Sick Accrual Schedules, Employee Tax Records, Employee Garnishment Deduction Records, and Employee Direct Deposit Records. Employee Benefits (with Payroll Integration) *including* - Health Insurance Enrollment, Life Insurance Enrollment, Retirement Enrollment, Miscellaneous Enrollment, FMLA, COBRA, and Benefits/Deductions Summary. Daily Payroll Procedures *including* - Transaction Entry, Build Checks, Calculate Checks, Accrue Transactions, Print Checks, and Generate ACH File.

**HUMAN RESOURCES WITH PAYROLL DAILY PROCESSES PROCEDURES – 6 HOURS ..... \$495**

Payroll Processing, Payroll Month-End, Reports & Inquiries

**SELDOM USED FEATURES 3 HOURS \$275**

Letter Writing Assistant, SmartList with Export Solutions, Business Alerts, Report Lists/My Reports, Macros, Reminders, Tasks, Excel Based Budgeting, Scheduled Payments

**RECONCILING AND TROUBLESHOOTING 3 HOURS \$275**

Running reports and tying the sub-modules (AR, AP, FA and Inventory) to the GL, Troubleshooting out-of-balance items, Using SmartList for reconciling/troubleshooting, Using GP Reconcile Utilities, Reconcile to GL Feature

**PROFESSIONAL SERVICE TOOLS LIBRARY & OTHER TOOLS 3 HOURS \$275**

Review of the Professional Services Tools Library – Changing Vendor IDs, Customer IDs, Employee IDs, Updating 1099 transactions, Other Downloadable Tools from CustomerSource.

**YEAR END CLOSING WITH BASIC REPORTING – 3 HOURS ..... \$275**

AR Year End Processes, AP Year End Processes, FA Year End Processes, GL Year End, Processes, Inquiry, SmartList and Reports

**PROJECT SERIES SETUP – 3 HOURS..... \$275**

User Project Accounting Setup, Project Accounting Setup, Posting Setup, Timesheet Setup, Equipment Log Setup, Miscellaneous Log Setup, Inventory Transfer Setup, Employee Expense Setup, Purchasing Setup, Billing Setup

**PROJECT SERIES MAINTENANCE I – 3 HOURS ..... \$275**

Customer Maintenance, Project Access List, Equipment Maintenance, Miscellaneous Maintenance, Vendor Maintenance, Cost Category Maintenance, Employee Maintenance, Rate Tables Maintenance, Billing/Revenue Cycle Maintenance, Fee Maintenance

**PROJECT SERIES MAINTENANCE II – 6 HOURS ..... \$495**

Template Maintenance, Contract Maintenance, Project Maintenance, Budget Maintenance, Change Orders

**PROJECT SERIES DAILY PROCEDURES– 6 HOURS ..... \$495**

Project Transactions *including* - Timesheets, Employee Expenses, Equipment Logs, Inventory Transfers, Miscellaneous Logs, Purchase Orders (standard and drop ship), Receiving Transactions, and Vendor Invoices. Project Time & Materials Billing, Project Fee Billing, Progress Billing, Project Revenue Recognition, Cycle Billing, Project Closing Entry

**PRINT BOSS – 3 HOURS ..... \$275**

Installing PrintBoss, Adding Banks, Importing Reports for GP, Setting Default Format in GP, Setting up Named Printers, Configuration and Settings.

**SMARTLIST 3 HOURS \$275**

General Navigation, Adding Columns, Changing Column Names, Queries, Query Options, Sorting, Exporting to Excel & Word, Export Solutions to an Excel Template, Export to Letter Writing Assistant

**SMARTLIST BUILDER 6 HOURS \$495**

Creating Smartlists, Adding\Removing Tables, Non-GP SQL Tables, Field Options, Calculated Fields, Summary Smartlists, Creating & Publishing Excel Reports

**INTEGRATION MANAGER I – 6 HOURS ..... \$495**

Product Overview, Basic Integration Creation using Standard Adapter, Defining Sources, Source Relationships, Selection Destinations, Field Mappings, Integration Restrictions

**INTEGRATION MANAGER II – 6 HOURS ..... \$495**

Data Translations, ODBC Connection Options, Scripting, Scheduling Integrations, Import Utility, SQL Optimized Adapter, Troubleshooting Integrations

**MANAGEMENT REPORTER OVERVIEW (FOR FRX USERS) 3 HOURS.....\$275**

Review New Navigation, Changes in Terminology, Changes in Calculations, Adding Logos, Publishing Options

**MANAGEMENT REPORTER 6 HOURS \$495**

Navigation, Terminology, Use of Rows Columns and Trees, Publishing and Exporting Reports, Learn through creating standard reports – Trial Balance, Income Statement, Balance Sheet.

**FRX BASICS I – 6 HOURS ..... \$495**

FRx Overview, Creating a Trial Balance, Creating an Income Statement, Creating a Balance Sheet, Working with Trees, Working with Drill-Down Viewer

**FRX BASICS II: – 6 HOURS..... \$495**

Transaction Level Detail, Working with Spec Sets, Relational Reporting, Side by Side, Tabular Reporting, Report Distributions, Report Launcher

**FRX ADVANCED I – 6 HOURS..... \$495**

Overview Review, Linking to External , Worksheets, Full Account Code & Multiple Segments, Rotate Building Blocks, Statement of Cash Flows, Allocations via FRx (Soft Allocations)

**FRX ADVANCED II – 6 HOURS..... \$495**

Overview Review, Row Linking, Relational Reporting, Effective Dates, Conditional Statements, Formatting Concepts, FRx Security

**REPORT WRITER BASICS I – 3 HOURS ..... \$275**

Basic modifications of existing reports, Report layout overview, Text, Graphics, Columns, Alignment tools

**REPORT WRITER BASICS II – 6 HOURS ..... \$495**

Planning a Report, Locating data, Array fields, field options and calculated fields, Linking tables, Additional headers and footers, Sort options and page breaks, Report restrictions

# CANCELLATION AND REFUND POLICIES

## **Client Cancellation and Refund Policy**

Advanced Integrators Knowledge Center incurs expenses in preparation of a scheduled class, therefore, when it is necessary for a client to cancel a class he/she is scheduled to attend, notification must be made to the Knowledge Center by phoning 405-946-1774 or emailing the Knowledge Center at [kc@advancedintegrators.com](mailto:kc@advancedintegrators.com) – please include the word “CANCEL” in the subject line. The cancellation policies are stated below.

Cancellation of class(s) at the Knowledge Center requires notice of cancellation by telephone or email five (5) business days (40 hours) prior to a scheduled date of class in order to receive a full refund.

Cancellation less than five (5) business days (40 hours) but not less than three (3) business days (72 hours) prior to a scheduled date of class will be eligible for a 50% refund. Cancellation with less than three (3) business days (72 hours) notice will not receive a refund.

Refund of Registration Fee(s) will be processed by check and mailed within 14 calendar days of receiving cancellation notice from client.

## **Knowledge Center Cancellation and Refund Policy**

The minimum enrollment requirement for each class is three (3) students. The Knowledge Center reserves, as approved by the Oklahoma Board of Private Vocational Schools, the right to cancel any class if the minimum enrollment requirement is not met. You will be notified by telephone or email of a class cancellation at least three (3) business days (72 hours) in advance of the scheduled class.

It is our policy to put your personal safety first. In case of inclement weather, please call 405-946-1774 after 6:30 am for closing information. There will be an alternate greeting that states the current date and whether the center is open as normal or closed for the day. If the center has lost power, there will be no greeting and clients can assume that the center is closed.

In the event a training class is cancelled by the Knowledge Center, the Client will receive a full refund.

Refund of Registration Fee(s) will be processed immediately and check will be mailed within five (5) business days of the notice of cancellation.

## CLASS TIMES

*Class will begin promptly at the scheduled times, so please arrive early to get settled in for class. The Knowledge Center will be open 30 minutes prior to scheduled class time.*

### **MORNING CLASSES**

9:00 am - 12:00 pm

### **AFTERNOON CLASSES**

1:00 pm - 4:00 pm

### **FULL DAY CLASSES (6 HOURS)**

9:00 am - 12:00 pm

Lunch at 12:00 pm (60 minutes)

1:00 pm - 4:00 pm

## WHO WE ARE

Advanced Integrators, Inc., owners of the Advanced Integrators Knowledge Center (the Knowledge Center), is an innovative, full-service software and technology integration and training firm with an emphasis on service. Our company was founded on the fundamental belief that developing trusted relationships with our clients is the key to sustained success.

At the Advanced Integrators Knowledge Center, we provide an innovative, effective, and targeted approach to learning. We offer classes in a feature specific format so that our clients will leave with the knowledge they need, delivered in a time and cost efficient format.

Our goal is to help individuals and companies achieve greater efficiency and effectiveness in the use of the software systems most important to their success. Contact us by email at [KC@AdvancedIntegrators.com](mailto:KC@AdvancedIntegrators.com) for more information.

## HOW WE OPERATE

The Advanced Integrators Knowledge Center operates during normal business hours. We do not schedule classes on any of the following holidays: New Year's Day, Good Friday, Memorial Day, Independence Day, Labor Day, Thanksgiving, and Christmas.

Our classes are offered in three (3), six (6), and twelve (12) hours sessions. The schedule of classes is published monthly on our web site ([www.advancedintegrators.com](http://www.advancedintegrators.com)). You may also receive schedule information by U.S. mail, email, or telephone. Descriptions of available classes, along with their cost, are available in the "Courses" section of this catalog.

The Advanced Integrators Knowledge Center is a professional, adult learning environment in a casual atmosphere. In addition to first class instruction we strive to provide a comfortable environment conducive to learning. We want you to feel at home so dress and conduct policies are dictated by courtesy and common sense.