

Advanced Reporting in The Financial Edge™

Overview

Advanced Reporting in The Financial Edge is an intensive two-day class designed to teach advanced functions in several areas, including Query, Visual Chart Organizer, Dashboards and Reports. The class includes instruction on complex processes using pragmatic scenarios and comprehensive learning to enhance the class experience.

Course Objectives

Upon completion of this class, the attendees will be able to:

- ♦ Create complex queries to group records for use in other areas of **The Financial Edge**.
- ♦ Use Visual Chart Organizer to create multiple chart templates.
- ♦ Export data for use in external applications.
- ♦ Construct financial statements using multiple chart templates and formatting options.
- ♦ Create pivot reports to view their accounting data in an interactive environment.
- ♦ Design dashboards to view up-to-the-minute reports and statistics.
- ♦ Create and schedule queues to automate processes.

Who Should Attend

The ideal attendee of this class is experienced with **The Financial Edge** and familiar with their organization's accounting practices. They have attended the *General Ledger Essentials* or *Transitioning to The Financial Edge* classes at Blackbaud University or regionally. Attendees should be persons responsible for extracting, analyzing, or manipulating data in **The Financial Edge**.

Class Level

Advanced Reporting in The Financial Edge is an advanced-level class. This class builds upon skills taught in the basic-level classes and is most beneficial to users who have an understanding of Query, Visual Chart Organizer, and Reports.

Prerequisites and Advanced Preparation

Before attending this class, attendees should have attended the *General Ledger Essentials* or *Transitioning to The Financial Edge* classes and should be familiar with their organization's accounting practices.

Continuing Professional Education

Advanced Reporting in The Financial Edge (an instructor-led program) is recommended for 14 hours of CPE credit



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Solutions?**

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