

Classroom course

Financial Reporting and Dashboards



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.

Class details

Audience	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.
Prerequisite(s)	<ul style="list-style-type: none">• Knowledge of basic accounting• Knowledge of financial and statutory reporting• Getting Started with Sage Intacct
Class length	Classroom: 2 days
What you need	<p>This is a hands-on course. Sage Intacct provides a sample environment for the activities. For the course, you need:</p> <ul style="list-style-type: none">• A laptop (not a tablet) with a supported browser.• Internet.• Microsoft Excel 2013 or later.
CPE credits	<ul style="list-style-type: none">• This course is eligible for 10 CPE credits.• This course program level is beginner.• The field of study is Computer Software & App.• The delivery method is Group Live.• To earn CPE credits you must attend the entire course and complete the course evaluation.

Course objectives

After completing 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

Run financial reports

- Run financial reports
- QuickStart library
- Accounts and account groups

Create financial reports

- Create financial reports
- Report permissions
- Row and column settings
- Formatting options

Compare financial data

- Compare columns by time periods
- Expand columns by dimensions
- Expand columns by time periods
- Expand rows by dimensions

Filter by dimensions

- Create a dimension group
- Filter a financial report

Create account groups

- Create account groups
- Create groups of account groups

Add statistical data

- Create statistical accounts and journal entries
- Automatic dimension counts

Perform row and column calculations

- Add a row calculation
- Add a summary on column
- Add a column calculation
- Add a percentage of amounts column

Create actual-to-budget financial reports

- View budget data
- Create actual-to-budget financial reports

Manage financial reports

- Report management options
- Create and run a report group

Create financial graphs

- Create financial graphs
- Data series and period comparison

Dashboards and performance cards

- Create a dashboard
- Add record, chart, report, and performance card components

More information

For more information regarding refunds, concerns, and program cancellation policies, please see our FAQ at www.sageintacct.com/training or contact us at training.sageintacct@sage.com.