

UNIT4

In Business for You

Success Catalog

Education

June 2025



Education Services Overview

| Success Product | Description |
|--|---|
| ERP - SYSTEM ADMINISTRATION | |
| ERP - System Administration - Fundamentals I – Admin Self-Paced | The System Admin/Super User training is designed to provide advanced knowledge for setting up and configuring the system. You will learn to use Attributes, Relations, and Account rules to post a simple financial transaction. Additionally, you will learn to set up a new company, users, and roles, and to give menu access. |
| ERP - System Administration - Common - Workflow Basic – Admin Self-Paced | The System Admin/Super User training is designed to provide knowledge of setting up and configuring the system. You will learn to design and implement a simple workflow process to approve a GL transaction. |
| ERP - System Administration - Common - Forms Basic – Admin Self-Paced | The System Admin/Super User training is designed to provide knowledge of setting up and configuring the system. You will learn to set up a form using Flexi-fields. |
| ERP - System Administration - Common - Workspace Basic – Admin Self-Paced | The System Admin/Super User training is designed to provide knowledge of setting up and configuring the system. You will learn about the setup needed to build a simple workspace. |
| ERP - System Administration - Reporting - Create ERPx Excelsior reports based on Information Browsers – Admin Self-Paced | The System Admin/Super User training is designed to provide knowledge of setting up and configuring the system. You will learn how to create an information browser template for an Excelsior report and connect an Excelsior report to that template. |
| ERP - System Administration - Configuration Manager – Admin Self-Paced | The System Admin/Super User training is designed to help administrators use Configuration Manager to move data from one client to another. |
| ERP - System Administration - Fundamentals II – Admin Self-Paced | The System Admin/Super User training is designed to provide advanced knowledge for setting up and configuring the system. You will learn how to set up and use Flex-fields, the Document Archive, Modeler, and Workflow. |
| ERP - System Administration - Fundamentals III – Admin Self-Paced | The System Admin/Super User training is designed to provide advanced knowledge for setting up and configuring the system. You will learn how to set up and use personal data anonymization, Workspace, Forms, and Data control. |
| ERP - System Administration - Reporting & IntellAgent – Admin Self-Paced | The System Admin/Super User training is designed to provide advanced knowledge for setting up and configuring the system. You will learn how to work with objects, information browser reports, balance tables, and IntellAgent. |
| ERP - System Administration - ERP Fundamentals & Reporting bundle – Admin Self-Paced | This bundle combines the Fundamentals I-III and Reporting & IntellAgent education products. |
| ERP - System Administration - ERP Fundamentals & Reporting certification – Admin Self-Paced | Take a 50-question exam to test your in-depth ERP knowledge and your ability to use the tool daily. |
| ERP - FINANCE | |
| ERP - Finance - General Ledger - Admin Self-Paced | System Admin/Super User training designed to give advanced knowledge to enable setup and configuration of the General Ledger module. |
| ERP - Finance - Accounts Payable – Admin Self-Paced | The System Admin/Super User training is designed to provide advanced knowledge for setting up and configuring the Accounts Payable module. You will learn how to work with suppliers/vendors, incoming invoices, and remittances. |

| Success Product | Description |
|--|---|
| ERP - Finance - Accounts Receivable – Admin Self-Paced | The System Admin/Super User training is designed to provide advanced knowledge for setting up and configuring the Accounts Receivable module. You will learn how to work with customers, follow up on invoices, and handle payments, including direct debits. |
| ERP - Finance – Admin Self-Paced | This bundle combines the General Ledger, Accounts Payable, Accounts Receivable and education products. |

| Success Product | Description |
|---|---|
| FP&A - FINANCIAL PLANNING & ANALYSIS | |
| FP&A - Reporting, Analysis & Dashboarding - Modeling - Admin Self-Paced | The Power User training shows you how to map cost centres and measures, create sub-plans, and transfer them to a P&L statement. |
| FP&A - Reporting, Analysis & Dashboarding - Reporting - Admin Self-Paced | The Power User training shows you how to set up first-rate worksheets using complex query techniques, actions, and various settings and formatting options. |
| FP&A - Reporting, Analysis & Dashboarding - Reporting 2 - Admin Self-Paced | The Power User training extends your reporting skills by offering new ways to visualise results, format and process data, and present information clearly. |
| FP&A - Reporting, Analysis & Dashboarding - Permission training - Admin Self-Paced | The Power User training helps you become familiar with FP&A permission management, including creating users, user groups, and defining permissions. |
| FP&A - Reporting, Analysis & Dashboarding - Defining data sheets for calculations - Admin Self-Paced | The Power User training helps you define datasheet settings for calculations in different modelling scenarios. |
| FP&A - Reporting, Analysis & Dashboarding - OneClient - Admin Self-Paced | The Power User training shows you how to use the FP&A OneClient interface to create worksheets and data widgets in dashboards. |
| FP&A - Reporting, Analysis & Dashboarding - Understanding modeling concepts - Admin Self-Paced | The Power User training helps you become familiar with advanced modelling techniques, including building period mapping cubes, parameter cubes, and working with external data cubes. |
| FP&A - Reporting, Analysis & Dashboarding - Internal import - Admin Self-Paced | The Power User training shows you how to use FP&A's internal import function and data cubes as an import source. |
| FP&A - Reporting, Analysis & Dashboarding - Power Training - Admin Self-Paced | Learn how to set up a comprehensive FP&A model, create reports, and manage users. |
| FP&A - Reporting, Analysis & Dashboarding - Power Training certification Self-Paced | Take a 35-question exam to test your in-depth FP&A knowledge and daily use of the tool. |
| FP&A - Reporting, Analysis & Dashboarding - Data Visualization Self-Paced | Learn to display data clearly and dynamically using charts and character strings in worksheets and widgets. Set up icons and hotlinks to navigate between reports. |

Notice/Disclaimer

Each packaged service (Service) set out in this catalogue has a detailed Service Description that is provided to you in advance of purchasing the Service, which sets out what Unit4 will deliver, what is expected of you and any assumptions or pre-requisites made in relation to the Service. You will be deemed to have accepted the terms of the Service at the point Unit4 commences delivery. These Services are pre-defined and cannot be adjusted. Unit4 shall not be obliged to deliver anything outside the defined scope or deliverables of the particular Service. In the event (i) Customer requires additional services beyond the defined scope, or (ii) services are required as a result of Customer's failure to fulfil its obligations, or (iii) the assumptions are incorrect or pre-requisites not fulfilled, Unit4 reserves the right to charge at its Prevailing Rates for any additional Services rendered.