

Advanced Financials

Agenda

Duration: 3 days
Times: 8:30 AM to 4:30 PM

Who Should Attend?

You should attend this course if you are responsible for building and maintaining the Aprimo financial products. This training is intended for customers or partners who have attended the pre-requisite training or have the equivalent practical experience.

What You Will Learn?

This course provides experience with the advanced features of the Aprimo financial management products. Case studies are used to reinforce key concepts and illustrate solutions for a variety of business requirements. The course concludes with an optional certification exam to demonstrate competency.

- Close out a fiscal period and evaluate the effects the closeout has on forecasts, commitments, and invoices.
- Prepare for year-end closeout by activating next year's plan and performing Forecast Only account mapping and carry forward budget allocation analysis.
- Perform a year-end closeout and learn how to identify financial records that need to be cancelled or carried forward, and identify objects that still have outstanding year-over-year mapping requirements.
- Create financial hierarchies that provide forecast and spend visibility across different Finance Groups.
- Design expense hierarchies for multiple Finance Groups that need to track expenses separately
- Design forecast, commitment, and invoice approval structures that utilize multiple Aprimo Tools system parameters.
- Create multiple currencies and evaluate the implications of exchange rate changes

Participants will also have an opportunity to develop configuration and administration skills using Aprimo tools.

How Will You Spend Your Days?

Day 1

8:30 a.m. – 9:00 a.m.
9:00 a.m. – 10:00 a.m.
10:00 p.m. – 3:30 p.m.
3:30 p.m. – 4:30 p.m.

Budgets and Forecasts

Review Fiscal Year Plans
Working with Multiple Finance Groups and Designing Multiple Hierarchies
Configure Case Study Environment
Present Case Study

Day 2

8:30 a.m. – 9:00 a.m.
9:00 a.m. – 11:00 a.m.
11:00 a.m. – 3:30 p.m.
3:30 p.m. – 4:30 p.m.

Expense Manager

Review
Working with Multiple Currencies and Managing Expenses
Configure Case Study Environment
Present Case Study

Day 3

8:30 a.m. – 8:45 a.m.
8:45 a.m. – 11:30 a.m.
11:30 p.m. – 12:00 p.m.
12:00 p.m. – 2:00 p.m.
2:00 p.m. – 3:00 p.m.

Budgets and Forecasts/Expense Manager

Review
Closing Out and Preparing for the Next Fiscal Year
Lessons Learned Forum
Configure Case Study Environment
Optional Certification Exam

How Do You Register?

To register, visit aprimo.com to access the registration form. Your spot is reserved once Aprimo receives your registration. All registrations must be received two weeks prior to the scheduled course.

Aprimo University reserves the right to cancel any class that does not meet the minimum enrollment size.