



CRGroup Academy Course Descriptions



Corporate Renaissance Group - Expertise & Solutions for Better Business Performance since 1989.

CRGroup Academy: Local Training in Microsoft® Business Solutions

Organizations make a significant investment in the business technologies you use every day. Corporate Renaissance Group has developed a training curriculum, offered through [CRGroup Academy](#), to help employees make the most out of that investment.

We offer half-day, full-day and two-day training in Microsoft Business Solutions including:

- Microsoft Dynamics™ GP
- Microsoft Power BI™
- Microsoft SharePoint™ Online
- Microsoft Management Reporter™

At CRGroup Academy, you will:

- Participate in classroom training, led by a subject matter expert
- Be provided with training computers/workstations
- Receive comprehensive course materials in soft-copy format
- Obtain a course completion certificate that may be used towards Continuing Education Credits
- Enjoy complimentary refreshments (lunch is also included with full-day courses)



Goal: Our team of experts will give you the knowledge and tools you need in order to maximize your organization's technology investment.



Location: Training sessions are held at our corporate head office located at [6 Antares Drive, Phase 1, Suite 200](#) (at the corner of Hunt Club Rd and Antares Dr. Just look for Hot 89.9, the radio station).

CRGroup Academy Pricing

Practical, hands-on training to help you get more from your investment in Microsoft and Dynamics technologies.

Session Length	Cost for 1 st Registrant	Additional Company Registrants	Academy Pass Vouchers
0.5 days	\$400	\$350	1
1.0 days	\$600	\$550	2

CRGroup Academy Pass (20 vouchers)	\$5,000
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Custom Training Sessions	Contact us for pricing
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* Pricing does not include applicable taxes

Invest in a CRGroup Academy Pass

It has never been more affordable to educate your employees and to ensure that your organization has the knowledge base required to support your key business solutions.

CRGroup Academy offers organizations the opportunity to purchase an **Academy Pass** which provides **20** training vouchers that may be used by any person with the organization. The vouchers may be applied to any of the in-class training that is offered by CRGroup.

The CRGroup Academy pass is valid for one year from the date of purchase at a cost of **\$5,000** plus all applicable taxes. With savings of up to \$3,000 off the standard rate, this is the most economical option to meet your organization's training needs.

Custom Training Sessions Tailored For Your Unique Needs

CRGroup is happy to design and present custom, hands-on training program for your company's business and/or technical users. Custom training sessions are designed to suit your unique needs and are conveniently held in your company's own location. We bring the training to you!

To discuss custom training solutions, please contact crgroupacademy@crgroup.com

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CRGroup Academy Current Course Descriptions:

We are always adding to our list of training sessions. Be sure to check our [website](#) regularly for updated CRGroup Academy courses and schedules.

Microsoft Dynamics GP

CRGroup Academy offers the following training courses related to Microsoft Dynamics GP:



- ▶ [Foundational Overview of Microsoft Dynamics GP 2016](#)
- ▶ [Administration in Microsoft Dynamics GP](#)
- ▶ [Management Reporter](#)
- ▶ [General Ledger Training](#)
- ▶ [Deep Dive into Dynamics GP SmartLists](#)
- ▶ [Receivables Management](#)
- ▶ [Understanding Cubes and Analytics in Dynamics GP](#)
- ▶ [Payables Management](#)
- ▶ [Overview of Fixed Assets in Dynamics GP](#)
- ▶ [Overview of Workflow in Dynamics GP](#)

Foundational Overview of Microsoft Dynamics GP 2016

Days: 1 Audience: Dynamics GP Users

Vouchers: 2

Course Description:

This course teaches students about the basic elements of Microsoft Dynamics GP. Topics covered during this session include: system and company setup procedures, how to use reports and inquiries, how to use SmartList to expand inquiry and analysis capabilities, business alerts, process server and tips for the user to personalize shortcuts and checklists to streamline business practices. **This course is a must for anyone new to Microsoft Dynamics GP 2016.**

During this course, students will cover the following topics:

- Using basic elements such as lookup windows, browse buttons and zooms to access data in Microsoft Dynamics GP
- Entering records and window level notes
- Attaching Documents
- Using SmartList to export data to Microsoft Word or Microsoft Excel for further analysis
- Using the Posting Setup options to define posting processes
- Customizing system and company setup procedures using the Setup Checklist
- Assigning and tracking the completion of setup tasks using the Setup Checklist
- Setting up fiscal periods, account formats, credit cards and payment terms
- Using inquiries and reports to get at the information needed
- Customizing Microsoft Dynamics GP toolbars, home pages and display settings
- Describing the benefits of using Business Alerts and Process Servers
- Viewing and using resource descriptions for tables and fields in Microsoft Dynamics GP
- Using the SQL backup system to back up a company database

Management Reporter

Days: 1 Audience: Dynamics GP Business Users Business Analysts
Vouchers: 2 Finance Managers Controllers

Course Description:

This course teaches students about Management Reporter and report design. Management Reporter is a powerful and flexible reporting tool that extends the value of financial data by providing timely financial and management reporting to business managers and report users. This reporting tool is for GL Financial reporting in Microsoft Dynamics GP.

This training course is designed for users who are new to Management Reporter or those who would like to reinforce their knowledge of basic and advance report design. This class will provide you with the knowledge to create and generate simple as well as complex financial reports.

During this course, students will cover the following topics:

- How to export the sample reports as a template for their own report design
- Design basic report building blocks in Report Designer including:
 - Row definitions
 - Column definitions
 - Reporting tree definitions
- Associate the building blocks in a variety of report definitions including:
 - Trial Balance reports
 - Income Statements
 - Variance reports
 - Balance Sheets
 - Statements of Cash Flow
 - Consolidation reports
- Discover the power and flexibility of reporting trees to present financial results at the responsibility level (i.e. by dimensions)
- Apply worksheet linking to report on data maintained in Microsoft Office Excel
- Use report output and distribution options including Report Viewer
- Implement security including customized roles, groups, and users
- Design reports that support XBRL
- Use the Report Wizard to create reports

Deep Dive into Microsoft Dynamics GP SmartLists, SmartList Builder and Report Designer

Days: 1 Audience: Dynamics GP Users Accounting Managers
Vouchers: 2 Controllers Finance Clerks

Course Description:

This course teaches students about the fundamentals of SmartLists, SmartList Builder and Report Designer. Put everyone in your organization in touch with vital business information with the more than 200 built-in SmartLists that are available in Microsoft Dynamics GP 2016. Learn what SmartLists are available and what they can do for your company. Also learn how SmartList functionality can be extended with SmartList Builder and Report Designer.

SmartList Builder and Report Designer are tools that substantially increases the power and range of SmartList, and gives you access to all the information that you capture within Microsoft Dynamics GP. This one day training will cover the fundamentals of using SmartList Builder and Report Designer including: finding tables, selecting fields, adding calculations, and restrictions.

During this course, students will cover the following topics:

- Introduction to SmartList , SmartList Builder and Report Designer
- Review of available SmartLists within Microsoft Dynamics GP 2016
- Creating New SmartLists
- Adding Restrictions
- Creating Calculated fields
- Generating Advanced Go To's
- Formatting fields
- Importing and Exporting SmartLists
- SmartList Builder security
- Other SmartList functionalities
- View, export and print data

Administration in Microsoft Dynamics GP

Days: 0.5 Audience: Dynamics GP Users
Vouchers: 1 IT Professionals

Course Description:

This course teaches students about the different administrative roles and tasks available to Microsoft Dynamics GP users and IT support. Students will have the opportunity to learn about common administrative tasks within Microsoft Dynamics GP.

During this course, students will cover the following topics:

- Administration for Microsoft Dynamics GP Power Users and IT Resources
 - Creating new user
 - Giving access to companies
 - User Security
 - Security Model
 - Security Tasks — Roles
 - Maintaining Alternate Forms and Reports dictionaries
 - Customization maintenance (Import and export packages)
 - Manual backup from Microsoft Dynamics GP
- Administration Tasks for IT Resources
 - Review of database maintenance plan
 - Monitoring maintenance plans
 - SQL Server Agent and scheduled jobs
 - Manual Backup from SQL Management Studio
 - Restoring databases
 - Manually restoring production on top of test database
- Advanced Administration for IT Resources
 - Monitoring performance of SQL Server
 - SQL Server tools and Management Studio
 - Using SQL Profiler to create a trace file

General Ledger Training

Days: 1 Audience: Dynamics GP Users Accounting Managers
Vouchers: 2 Controllers Finance Clerks

Course Description:

This course provides students with a general overview of the features and benefits of using the General Ledger in Microsoft Dynamics GP 2016. It explores the accounting cycle and the processes required to enter financial data into Microsoft Dynamics GP.

During this course, students will cover the following topics:

- The features available in General Ledger and their benefits
- General Ledger Setup
- Account Structure
- Chart of Accounts setup, including posting, unit and allocation accounts
- Review budgets and quick journals
- Recording and posting General Ledger transactions
- The difference between transaction level and batch level posting, and the methods for posting batches
- How to use Multidimensional Analysis, enter Intercompany transactions and set up Organizational Structures to use account security
- The functionality available to maintain General Ledger records
- Perform key inquiries and print reports from GL
- The process of closing an accounting period and the fiscal year

Receivables Management

Days: 1 Audience: Dynamics GP Users Accounting Managers
Vouchers: 2 Controllers Finance Clerks

Course Description:

This course teaches students how to use the Microsoft Dynamics GP Receivables Management module, including credit memos, prepayments, small balance write off, printing customer statements, entering and voiding scheduled payments, and month-end closing procedures. Students will also learn how to set terms for calculating document discount dates, use balance forward and open-item statement, and to apply any mix of the comprehensive service and finance charges available.

During this course, students will cover the following topics:

- Receivables Setup Options
- Set up and maintain customer records, including customer classes
- Set up salespeople and territories, entering and posting sales transactions
- Review Scheduled Payments
- Handling cash receipts
- Managing NSF cheques and voiding transactions
- Aging customer accounts
- Assessing finance charges
- Printing statements and other reports
- Creating and printing invoices for customers
- Applying payments to customer accounts
- Completing period-end procedures

Payables Management

Days: 1 Audience: Dynamics GP Users Accounting Managers
Vouchers: 2 Controllers Finance Clerks

Course Description:

This course teaches students how to use the Microsoft Dynamics GP Payables Management module. Students will learn how to create and set up vendor records, handle daily and period-end procedures such as entering invoices and credit memos, and printing vendor cheques.

During this course, students will cover the following topics:

- Completing the setup necessary to start using Payables Management
- Setting up vendor records and classes
- Performing all Payables Management related data entry functions including vendor invoicing, cheque processing, recurring vouchers, and manual checks
- Performing maintenance on Payables Management documents and other records such as vendors and recurring invoices
- Selecting documents for payment and make appropriate adjustments to payment amounts prior to check processing
- Generating computer and manual cheques for vendors
- Applying Documents
- Placing or releasing holds
- Voiding vouchers and payments
- Identify Posting options and information flow within Payables Management
- Using reports and inquiries to access needed payables information
- Completing period-end and year-end procedures

Bank Reconciliation

Days: 0.5 Audience: Dynamics GP Users Accounting Managers
Vouchers: 1 Controllers Finance Clerks

Course Description:

This course teaches students about the accounting cycle and the processes required to manage cash receipts, cash disbursements, and other transactions that affect checkbook balances. You will learn how to perform the reconciliation process, ensuring accuracy of your financial data and its relation to your financial institution. A thorough understanding of these topics allows you to reconcile your checkbooks with your bank statements, keeping information consistent and accurate. You will learn to use comprehensive reporting features to preview data in different ways prior to performing the reconciliation process, as well as how to use the Checkbook Register report, which may be printed at any time. This course also teaches you how to define default values that automatically populate data fields and gather the information you need to make better business decisions by exploring powerful inquiry and lookup functions.

During this course, students will cover the following topics:

- Customizing the setup of Bank Reconciliation to fit business needs
- Performing all Bank Reconciliation related data entry functions, including bank transactions, bank deposits, and bank transfers
- Performing maintenance on Bank Reconciliation documents and records such checkbooks



- Printing standard reports for audit trail purposes, financial analysis, and to verify data entry
- Identifying the impact of the Bank Reconciliation module on other modules
- Troubleshooting and correcting input errors, including incorrect posting date or incorrect document amounts
- Performing the bank reconciliation process

Understanding Cubes and Analytics in Microsoft Dynamics GP

Days: 1 Audience: Dynamics GP Technical Users
Vouchers: 2 IT Professionals

Course Description:

This course teaches students how to use Analysis Cubes and Pivot Tables to analyze the Business Intelligence needs of an organization. It describes the key features for Analysis Cubes and how to install and use them. It will also explain how to create and use a Pivot Table report using Analysis Cubes.

During this course, students will cover the following topics:

- Using Analysis Cubes
- Features and benefits of Analysis Cubes
- Analysis Services environment
- Installing and configuring Analysis Cubes
- Using Analysis Cubes
- Creating Pivot Table reports
- Using Pivot Table reports
- Review of OLAP technology

Overview of Workflow in Dynamics GP

Days: 0.5 Audience: Dynamics GP Users Accounting Managers
Vouchers: 1 Controllers Finance Clerks

Course Description:

Microsoft Dynamics GP comes with a Workflow system that gives users the ability to create workflows, or approval processes, that are specific to organization's needs. Workflow creates consistent processes for how a document, master record, or batch "flows" through GP by showing who must approve it, and the conditions for its approval. This overview training will show you the workflows that are now available within Dynamics GP and how they might be useful for your organization.

During this course, students will cover the following topics:

- General Overview
 - What's new in Workflow 2.0
- Overview of existing workflows, including:
 - Purchase Order Approval
 - Purchase Requisition Approval
 - Project Timesheet Approval
 - Payables Batch, Accounts Payable Invoices
 - General Ledger Batch
 - Receivables Batch
 - Project Expenses
 - Vendors

Overview of Fixed Assets in Microsoft Dynamics GP

Days: 0.5 Audience: Dynamics GP Users Accounting Managers
Vouchers: 1 Controllers Finance Clerks

Course Description:

Track fixed asset information with greater ease and efficiency with the Fixed Assets module in Microsoft Dynamics® GP. Fixed assets assists in creating and maintaining asset records, including depreciation calculations and entries, physical location tracking, and changes and transfers of assets. Manual tracking of assets and calculations for depreciation will be a thing of the past for your organization by implementing the Fixed Assets module.

Fixed Assets will provide a complete history of all your assets from acquisition to retirement. This training will provide the fundamentals for setting up fixed asset records and depreciations schedules, entering asset information using payables management integration, completing depreciation projections, and running month end procedures.

During this course, students will cover the following topics:

- General Overview and Setup
 - Configure the Fixed Assets Calendar
 - Enter Account Groups
 - Enter Fixed Assets Posting Accounts
 - Create Asset Classes
 - Create Book Records
 - Create Book Class Records
- Daily Procedures
 - Asset General Information using Payables Management Integration
- Maintaining Records
 - Depreciation Projections
 - Using Inquiries
 - Reporting Options
- Period-End Procedures

Microsoft SharePoint Online



CRGroup Academy offers the following training courses related to Microsoft SharePoint

➤ [Introduction to SharePoint Online](#)

Introduction to Microsoft SharePoint Online

Days: 0.5 Audience: SharePoint End users

Vouchers: 1

Course Description:

This introductory SharePoint Online course will lead you through an array of important topics for new or experienced SharePoint end users.

During this course, students will cover the following topics:

Part 1: Adding/Changing content

- Sub-sites
- Lists/Libraries
- Web parts
- Pages
- Wikis
- Adding/moving documents
- Navigation options
- Customize look and feel – themes and master pages
- SharePoint Add-ins (Apps)

Part 2: Document Management

- Content types/metadata
- Document recovery
- Search
- Record centre
- Version control
- View/edit draft items
- Workflows

Part 3: Permissions and Security

- Permissions Levels
- How to check and set permissions
- Sharing with external users
- IRM

Microsoft Power BI



CRGroup Academy offers the following training courses related to Microsoft Power BI

- [Introduction to Power BI \(basic\)](#)
- [Deep-Dive into Power BI \(advanced\)](#)

Introduction to Microsoft Power BI (basic)

Days: 1 Audience: Dynamics GP Business Users Business Analysts IT Professionals
Vouchers: 2 Finance Managers Controllers

Course Description:

Power BI is a suite of business analytics tools to analyze data and share insights. The introduction to Power BI will show you how you can monitor your business and access information quickly using rich dashboards on various devices.

During this course, students will cover the following topics:

- Introduction to Power BI
 - Introduction to the Power BI Platform
 - Introduction to the Power BI Service
 - Understanding Power BI Workspaces
 - Creating Datasets, Reports and Dashboards
- Power BI Desktop, overview
 - Getting Started with Power BI Desktop
 - Using Power Query to Import Data
 - Understanding the Built-in Visualization Types
 - Designing static Reports/Dashboards
 - Designing Interactive Reports / Dashboards
 - Publishing Reports / Dashboards
 - Creating different workspaces
 - Natural Language Queries and the Q&A Search Box
 - Sharing Dashboards with Other Users
 - Importing Data from Excel
- Dashboards for Mobile Devices
 - Understanding Power BI Support for Mobile Device
 - Installing the Power BI App on Windows
 - Installing the Power BI App on Tablets and Mobile Devices
 - Designing Dashboards with Mobile Devices in Mind

Deep-Dive into to Microsoft Power BI (advanced)

Days: 1 Audience: Dynamics GP Business Users Business Analysts IT Professionals
Vouchers: 2 Finance Managers Controllers

Course Description:

Power BI is a suite of business analytics tools to analyze data and share insights. This deep dive into Power BI will take you beyond the basics and show you the true power that this tool can bring to your business.

During this course, students will cover the following topics:

- Power BI Advance
 - Using Power Pivot to Model Data
 - Data Sources and Data Discovery
 - Power Query Fundamentals
 - Working with the Query Editor Window
 - Combining Queries
 - Import Data using SQL Tables
 - Import Data using SQL Views
 - Import Data from other sources
 - Data Modeling
 - Creating Calculated Columns
 - Integrating Lookup Tables
 - Creating Measures
 - Transforming Data

- Dashboard Designing and Publishing
 - Download 3rd party / custom visualizations
 - Dashboards
 - Designing Animated Dashboards
 - Natural Language Queries and the Q&A Search Box
 - Deploying Dashboards using Content Packs

- Managing Power BI Gateways and On-premises Data
 - Deciding When to Use DirectQuery Mode
 - Understanding Power BI Gateways
 - Installing and Configuring a Personal Gateway
 - Installing and Configuring an Enterprise Gateway
 - Configuring a Dataset with an Auto Refresh Schedule

Pre-requisites:

A thorough understanding of the topics covered in the Introduction to Power BI (basics) course.

Get Started!

To book your CRGroup Academy training, please contact Angela Gillis or [email us directly here](#).



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