XYZ Generator – Reporting Made Easy

Course Outline

Objective

The purpose of the training session is to:

- Provide an overview of the features and functionality the XYZ Generator.
- Demonstrate how to manage data and content in the Generator tool.
- Review how data can be rolled over to the next year.
- Outline support and help available.

Learning Outcomes

At the end of this session the participant will be able to:

- Access the Generator in Checkpoint
- Load and map trial balances
- Save and load report templates and mapping files
- Know how to navigate through the report template and add information where required.
- Identify how to make changes to the template, including how to hide or edit content
- Roll-over last year's data and add/amend data in existing reports
- Know how to access help.

Audience

For users that subscribe to the XYZ Generator or XYZ Generator Plus.

Session Duration

30 minutes (0.5 CPD points). CPD certificates are available upon request from your Training Specialist

Session Delivery

The training session will be delivered online via Microsoft Teams, which allows the participant to view the trainer's computer screen.

Training Specialist

Allison Patrick is a Training Specialist for TR's Australian and New Zealand Tax and Accounting customers and is focussed on ensuring they get the most out of their Checkpoint subscription.