

Certinia xRB Training: Part 1 – Introduction to Analytics & xRB Report Builder

Duration

- 2 Hours

Audience

- New Certinia Report Builder (xRB) users or those needing a refresher on fundamentals

Goal

- Provide foundational understanding and hands-on exposure to xRB setup, lens configuration, and basic report usage

Prerequisites

- Access to the Certinia Analytics Studio and xRB Report Builder
- Familiarity with basic financial reporting concepts
- Optional: Review the Certinia ERP Cloud - Report Builder Academy module
- xRB Version: Summer '24 or higher

Agenda

- **Welcome & Overview (10 min)**
 - Introduce session goals and logistics
 - Explain the learning pathway to Part 2
- **What is xRB? Why Use It? (20 min)**
 - Purpose and power of xRB for financial reporting
 - Pros & cons overview
- **Out-of-the-Box Reports & Report Packs (20 min)**
 - Standard reports included
 - Certinia Winter '24 report pack and customization tips
- **xRB Setup & FRB Lenses App (30 min)**
 - Creating and configuring lenses in the FRB Lenses App
 - Filter and table setup walkthrough
- **End-User Tips & Hands-On Demo (30 min)**
 - Label editing, alias setup, calculations
 - Formatting features and layout management
- **Resources & Practice Recommendations (10 min)**
 - Certinia Academy, Community, Reporting Clinic, xRB Readiness sessions