

Learning Catalogue


Access Accountants

APAC Learning Services



Contents

This document contains learning pathway and course information for Access Accountants solutions.

 Click on the topics to the right to quickly navigate to the associated pages.

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Learning Approach



Learning Pathways

Our learning content is positioned within product-based Learning Pathways. These pathways will determine the sequence in which learners need to complete learning content.

Learning Pathways are based on Learning Levels (**Getting Started**, **Core**, and **Elective**), which are designed to guide learners progressively through the information they need to know based on where they sit within the product enablement journey.



Getting Started

What you need to know when accessing the product for the first time.



Core

How to complete the most common tasks and workflows using the product.



Elective

Optional, advanced, or topical content designed to keep your finger on the pulse and become an expert user (*coming soon*).

Workflow and Role Based Learning

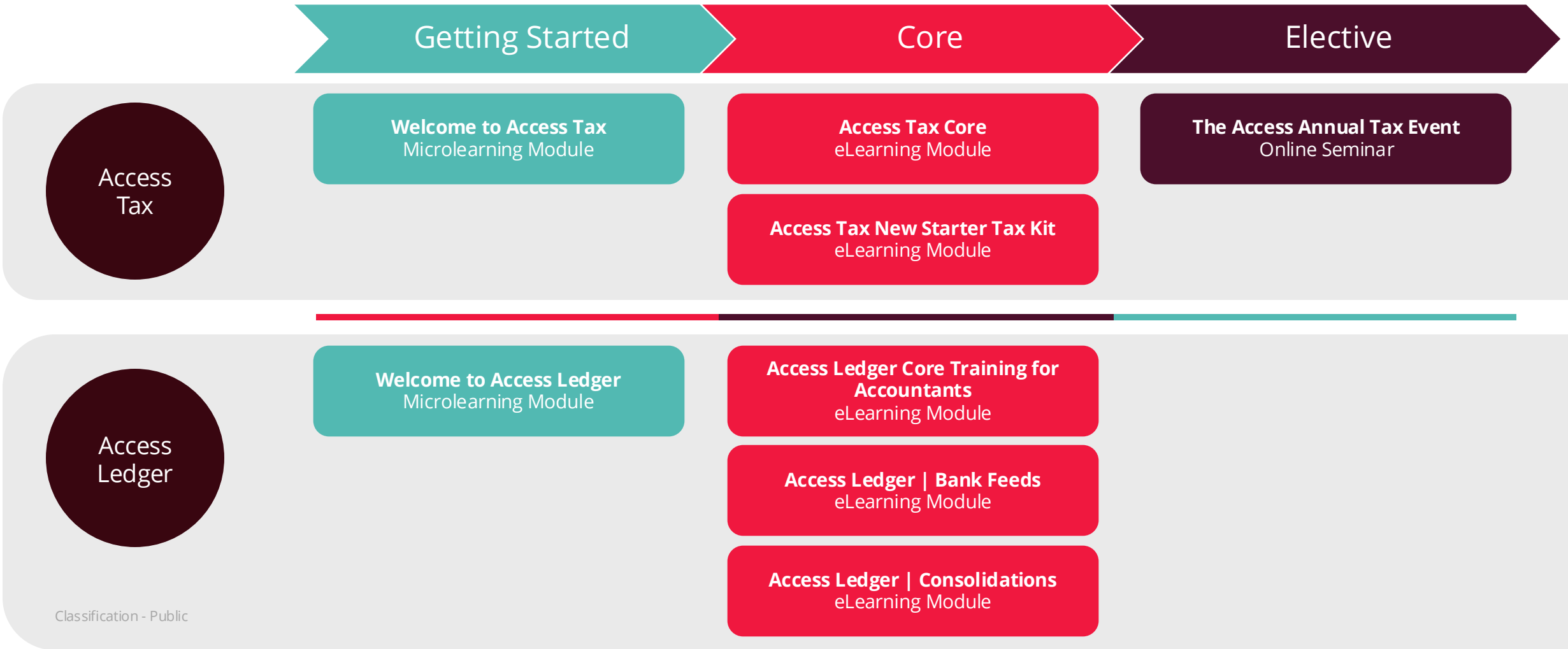
Workflow-based learning emphasises learning by doing, using sequential steps that make up the workflow as a framework for applying knowledge.

Role-based learning customises content to align with specific job roles and responsibilities, concentrating on knowledge and skills pertinent to them. This approach ensures that learning is directly relevant and applicable to the job context.

Look for the **Target Audience** section within a **course outline** to understand the most suitable roles the training will cater for.

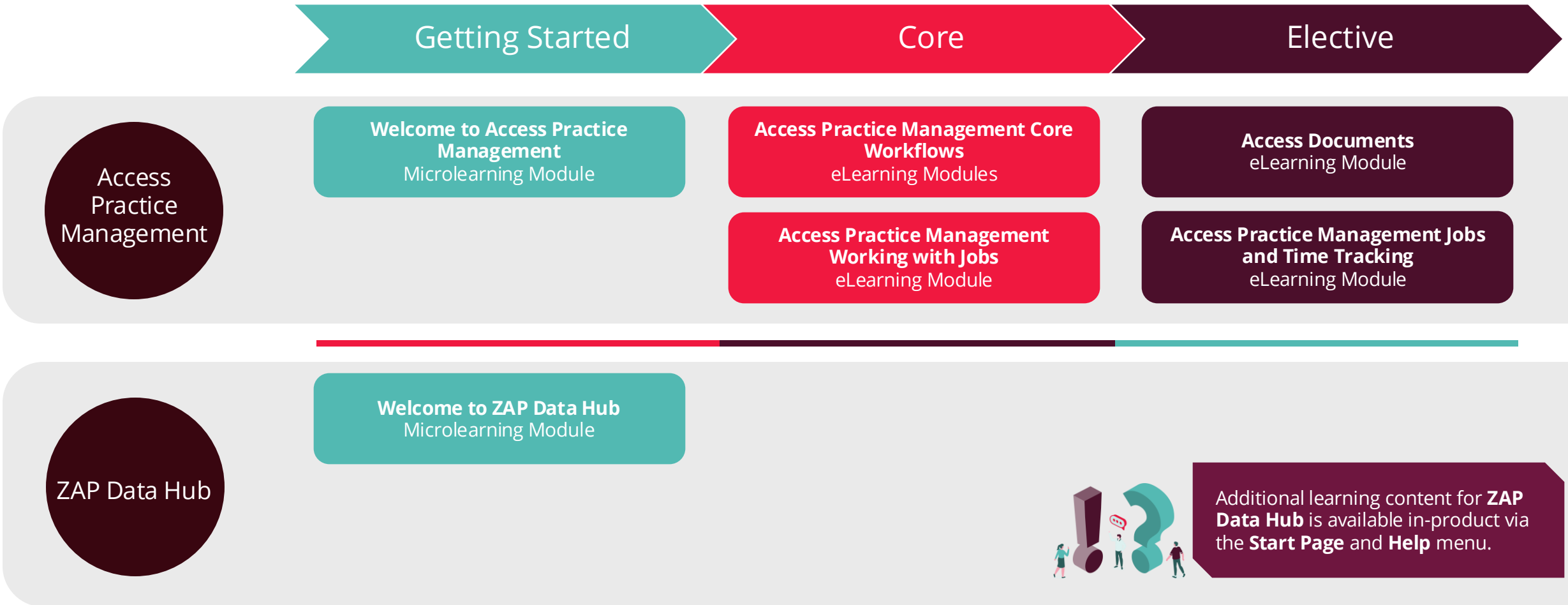


Learning Pathways: Access Accountants





Learning Pathways: **Access Accountants**



Course Outlines

Welcome to Access Tax

Overview:

This is the first learning module of the Access Tax Learning Pathway and is designed to introduce new users to the product. Completion of this module is required before moving on to future Access Tax learning modules.

Delivery Method

Interactive microlearning module. This module will take approximately 15 minutes to complete.

Target Audience

New users of the Access Tax product.

Prerequisites and Requirements

This online module requires audio capability and an active internet connection.

What does this course cover?

In this [Getting Started](#) module, you will learn how to:

- Log into Access Tax for the first time
- Set up Multifactor Authentication
- Reset your Password
- Navigate the product
- Seek product support

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the key features of Access Tax and how to navigate to them.



Access Tax Core Learning

Overview:

This is the second learning module of the Access Tax Learning Pathway and is designed to take users through core-level tasks and workflows.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 60 minutes to complete.

Target Audience

New users of the Access Tax product. Existing knowledge and understanding of Accounting principles will be useful.

Prerequisites and Requirements

Prior completion of the Welcome to Access Tax module is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

In this **Core** module, you will learn how to:

- Navigate the Practice Settings menu
- Create and link a new Practice
- Create Client Reports
- Manage Clients and Client Information
- Create a New Tax Form
- Filter Data and Tax Forms
- Create an Activity Statement
- Lodge a Return
- Run Standard Reports
- Build a Custom Report using Report Builder
- ATO Reporting

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with using the key features of Access Tax to complete common tasks.



Access Tax New Starter Tax Kit

Overview:

This interactive eLearning module is designed to guide new users through the steps required to complete individual tax returns, and associated activities, using Access Tax.

Delivery Method

Interactive role-based eLearning module. This module will take approximately 90 minutes to complete.

Target Audience

New users of the Access Tax product. Having an existing knowledge and understanding of Accounting principles is strongly recommended.

Prerequisites and Requirements

Prior completion of the Welcome to Access Tax module is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

In this **Core** module, you will learn how to:

- Add and Edit Client Details
- Create and Prepare an Individual Return
- Lodge an Individual Return
- Process an Amendment

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the steps required to update client information, create and then prepare, lodge and amend individual returns.

The knowledge gained through this module can be applied to the creation, preparation, and lodgment of other return types.



The Access Annual Tax Event

Overview

The Access Annual Tax Event is an interactive online seminar where our renowned tax and accounting specialists share crucial updates and insights to deepen your understanding, ensure compliance and prepare your practice for the new tax year.

Delivery Method

This event is an online seminar and runs for approximately 90 minutes.

Target Audience

This session is best suited to those with an existing knowledge and understanding of Accounting principles.

Prerequisites and Requirements

The online seminar is delivered via the GoTo platform. Audio capabilities and an active internet connection are required.

What does this event cover?

The following topics will be covered in detail:

- The latest legislative and compliance changes impacting the Accounting industry
- Industry updates and insights to prepare you for the new tax year
- Federal Budget Review
- Live audience Q&A and polling

Access Accountants Course Outline

Benefits of attending this event

Attending this event will deepen your understanding, ensure compliance and prepare your practice for the new tax year with knowledge that matters!

Handouts and a session recording will be shared with attendees after the event (available to view for three months).



Welcome to Access Ledger

Overview:

This is the first learning module of the Access Ledger Learning Pathway and is designed to introduce new users to the product. Completion of this module is required before moving on to future Access Tax learning modules.

Delivery Method

Interactive microlearning module. This module will take approximately 15 minutes to complete.

Target Audience

New users of the Access Ledger product.

Prerequisites and Requirements

This online module requires audio capability and an active internet connection.

What does this course cover?

In this [Getting Started](#) module, you will learn how to:

- Log into Access Ledger for the first time
- Set up Multifactor Authentication
- Reset your Password
- Navigate the product
- Seek product support

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the key features of Access Ledger and how to navigate to them.



Access Ledger Core for Accountants

Overview:

This is the second learning module of the Access Ledger Learning Pathway. This module covers the most common tasks that make up the key workflows within the product.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 120 minutes to complete.

Target Audience

New users of the Access Ledger Product. Having an existing knowledge and understanding of Accounting principles is strongly recommended.

Prerequisites and Requirements

Prior completion of the Welcome to Access Ledger module is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

In this **Core** module, you will learn how to:

- Understand key terms and workflow journeys
- Manage Client Groups, Entities, and Files
- Prepare Data (Collection and Processing activities)
- Prepare Accounts, including Source Accounts, Account Allocation, and Assets
- Generate and Export Reports, including Special and General Purpose Reports, Tax Reporting, and eSignature

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the key features of Access Ledger, along with the different data preparation journeys and the accounts preparation tasks required to produce a set of accounts.



Access Ledger | Bank Feeds

Overview:

This module focuses on setting up and using Access Bank Feeds in conjunction with the Access Ledger product.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 15 minutes to complete

Target Audience

Users of the Access Ledger product also subscribed to Access Bank Feeds. Existing knowledge and understanding of Accounting principles is strongly recommended.

Prerequisites and Requirements

Prior completion of the Welcome to Access Ledger and Access Ledger Core Training for Accountants modules is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

In this **Core** module, you will learn how to:

- Set up Access Bank Feeds
- Import Transactions into Access Ledger using Access Bank Feeds
- Review imported Access Bank Feeds Transactions

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the key features of Access Bank Feeds when using Access Ledger.



Access Ledger | Consolidations

Overview:

This module focuses on performing consolidations using the Access Ledger product.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 60 minutes to complete

Target Audience

Users of the Access Ledger product. Existing knowledge and understanding of Accounting principles is strongly recommended.

Prerequisites and Requirements

Prior completion of the Welcome to Access Ledger and Access Ledger Core Training for Accountants modules is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

In this **Core** module, you will learn how to:

- Decide what type of consolidation is appropriate for different entity structures.
- Perform entity consolidations within the product.
- Produce reports relevant to consolidated entities.

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will be able to understand how to navigate and use the features of Access Ledger to effectively complete a consolidation. You will learn how to manage client consolidations and generate client reports.



Welcome to Access Practice Management

Overview:

This is the first learning module of the Access Practice Management Learning Pathway and is designed to introduce new users to the product. Completion of this module is required before moving on to future Access Practice Management learning modules.

Delivery Method

Interactive microlearning module. This module will take approximately 15 minutes to complete

Target Audience

New users of the Access Practice Management product.

Prerequisites and Requirements

This online module requires audio capability and an active internet connection.

What does this course cover?

In this [Getting Started](#) module, you will learn how to:

- Log into Access Practice Management for the first time
- Reset your Password
- Salesforce Terminology
- Navigate the product
- Basic Customisation
- Seek product support

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the product layout and how to navigate to key features of Access Practice Management.



Access Practice Management Core

Overview:

This is the second learning module of the Access Practice Management Learning Pathway. This module covers the most common tasks that make up the key workflows within the product.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 90 minutes to complete.

Target Audience

New users of the Access Practice Management product.

Prerequisites and Requirements

Prior completion of the Welcome to Access Practice Management module is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

This **Core** module covers the following workflows:

Administration Workflows

- Administration Settings
- Calendar
- Adding and Editing Employees

Client Management Workflows

- Clients Tab
- Adding and Editing Clients
- Client Communication

Reporting Workflows

- Navigating the Reports Tab
- Running Reports
- Creating Custom Reports

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with some of the key workflows and features within Access Practice Management.



Access Practice Management Working with Jobs

Overview:

This Access Practice Management learning module covers the most common tasks that make up key jobs workflows within the product.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 60 minutes to complete.

Target Audience

New users of the Access Practice Management product.

Prerequisites and Requirements

Prior completion of the Welcome to Access Practice Management module is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

This **Core** module covers the following workflows:

Administration Workflows

- Employee and Client Setup
- Configuring Jobs and Tasks

Jobs and Timesheet Workflows

- Creating and Managing Employee Jobs
- Tracking and Managing Practice Jobs
- Integrating Timesheets with Jobs

Reporting Workflows

- Reporting Basics
- Jobs Reporting

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with some of the key job tracking workflows and features within Access Practice Management.



Access Documents

Overview:

The Access Documents eLearning module covers the most common tasks relating to document management, sharing, and electronic signatures for both practice and client (end) users.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 120 minutes to complete.

Target Audience

New users of the Access Documents product.

Prerequisites and Requirements

This online module requires audio capability and an active internet connection.

What does this course cover?

This Elective module covers the following workflows:

Getting Started

- Navigation in the Product
- Adding Clients

Practice Users

- Managing Documents
- Sharing Documents
- Requesting Signatures

Practice Client Users

- Quick Start Guide

Benefits of completing this learning module

By completing this course, you will become familiar with some of the key Access Documents workflows and features.

Please note that access to the Access Documents product/functionality is dependent on your current product subscription/inclusions.



Access Practice Management Jobs and Time Tracking

Overview:

This is the third learning module of the Access Practice Management Learning Pathway. This module covers the most common tasks that make up the key workflows within the product.

Delivery Method

Interactive workflow-based eLearning module. This module will take approximately 180 minutes to complete.

Target Audience

New users of the Access Practice Management product.

Prerequisites and Requirements

Prior completion of the Welcome to Access Practice Management module is mandatory. This online module requires audio capability and an active internet connection.

What does this course cover?

This Elective module covers the following workflows:

Administration Workflows

- Employee and Client Setup
- Configuring Jobs and Tasks

Jobs and Timesheet Workflows

- Creating and Managing Employee Jobs
- Tracking and Managing Practice Jobs
- Integrating Timesheets with Jobs

Disbursements and Invoicing Workflows

- Processing Disbursements
- Preparing and Issing Invoices

Reporting Workflows

- WIP Ledger Reporting
- Debtors Ledger Reporting

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with some of the key jobs and time tracking workflows and features within Access Practice Management.

Please note that access to the Timesheet and Invoicing functionality in Access Practice Management is dependent on your product subscription inclusions.



Welcome to ZAP Data Hub

Overview

This learning module is designed to introduce new users to the ZAP Data Hub product including first-time sign in and basic navigation.

Delivery Method

Interactive microlearning module. This module will take approximately 15 minutes to complete.

Target Audience

New users of the ZAP Data Hub product.

Prerequisites and Requirements

This online module requires audio capability and an active internet connection.

What does this course cover?

In this [Getting Started](#) module, you will learn how to:

- Sign into ZAP Data Hub for the first time
- Set up Multifactor Authentication
- Reset your Password
- Navigate to key product areas
- Seek product support

Access Accountants Course Outline

Benefits of completing this learning module

By completing this course, you will become familiar with the key features of ZAP Data Hub and how to navigate to them.

You will also be able to utilise our in-product Help menu to access 'how-to' content and videos for the fields and pages you are currently on.



Have a question about learning or want to know more about our courses?

Contact our team today!

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