BlackLine Essentials for End-Users
Train-The-Trainer

Whether new to BlackLine or need a refresher, course participants will learn the entire process of preparing, certifying, approving, and reviewing a quality reconciliation. Also, they will be introduced to reconciliation templates, and how items can and should be used to support Account Reconciliations.

Benefits

- Private, live training delivered by a BlackLine Subject Matter Expert
- Provides everything end-users need to know to get started with Account Reconciliations
- Hands-on activities that can be utilized in class or post-session
- Earn Continuing Professional Education (CPE) credits
- Prepare your designated trainers to deliver course content

Learning Objectives

BY THE END OF THIS SESSION, YOU WILL BE ABLE TO:

- Explain the BlackLine Reconciliation Process
- Describe the function of key BlackLine roles
- Locate information essential to completing a reconciliation and navigate within BlackLine Account Reconciliations
- Recognize the importance of a complete Purpose and Procedure
- Complete the steps to prepare, certify, approve, review, or reject an account reconciliation
- Describe the purpose and structure of Reconciliation templates
- Identify the characteristics of a quality reconciliation
- Explain the purpose of Items in the account reconciliation process
- Define the different types of currency used when entering an Item, determine when to use each type of Item Class, and give examples of when to use each of the Item Dates
- Contrast between Supporting Items, Summary Items, Item Sub-Types, and Supporting Documents
- Manually add an Item to an account reconciliation, clone and copy Items, and import, close, and delete Items in bulk
- Evaluate the benefits of using Teams, My Views, Comments, Notebook, Email Alerts, and Reporting
- Define your organization’s BlackLine Training Rollout Strategy
- Explain the five Universal Truths of Successful Training
- Identify opportunities to tailor course content
Train-The-Trainer

The Train-The-Trainer version of this live course includes two full days of training, which can be delivered onsite over two days OR virtually over half-days. Day 1 is spent with a BlackLine instructor delivering the full list of learning objectives as listed above. Day 2 we will prepare your designated trainers to deliver this course at your organization.

Prior to delivery, the BlackLine Global Training and Education Team will schedule an introductory call with you and your team to ensure alignment on the Day 2 agenda.

High-level overview of the Train-The-Trainer Day 2 Topics:

1. The Art of Engaging Instruction
2. Activity: Training Rollout Strategy
3. Class Logistics
4. Lesson Summary Review
5. Activity: Tailoring Opportunities
6. Activity: Test Drive
7. Final Q&A

All Train-The-Trainer Day 2 participants will receive access to the Facilitator Toolkit, which includes the resources listed on the right.

FACILITATOR TOOLKIT

Course PowerPoint Presentation complete with detailed speaker notes that allows for future edits by your team to meet your organization’s requirements

Facilitator’s Guide that provides specific instructions on how to deliver each lesson

Two Use Case Demonstration Videos to avoid complex instance staging

Train-The-Trainer Participant Guide which is a PDF version of the Day 2 presentation used for future reference

Course Activity Guide that helps learners apply course concepts in their own instance

Post-Course Participant Guide which is a PDF version of the Day 1 presentation used for future reference
Frequently Asked Questions

Who is the intended audience for this class?
This course is designed for all end-users (e.g. Preparers, Approvers, and Reviewers) as well as designated trainers that will be delivering this course material at your organization. Administrators are also encouraged to attend.

When should this class be scheduled for my team?
If you are in the implementation phase, we recommend scheduling this class just before User Acceptance Testing OR ~2-3 weeks out from your go-live date. Doing this allows your team to feel confident and prepared to apply what they learned in the course within a reasonable timeframe. For existing customers, it can be scheduled as needed in the cases of refresher training, new user onboarding, or entity expansion. Please work with your BlackLine U primary contact to identify the date for the training at least 4-6 weeks in advance to schedule the necessary resource.

How many students can participate in this class?
There is a minimum of 5 students for a session to run. There us a maximum number of 30 students for a Train-The-Trainer session.

How long is the course?
The Train-The-Trainer version of this class is 12 hours, including all content, activities, and scheduled breaks. For onsite sessions, you team should plan on reserving two full days. For virtual sessions, the course can be delivered over multiple sessions.

Is this course CPE/CPD-eligible?
This class is eligible for CPE/CPD credits. As soon as the participant meets the requirements (e.g. self-enrolls in the course on BlackLine U and completes the CPE survey), the certificate will be available for immediate download.

What instructional methods are used in this course and in what language(s)?
Your instructor will use:
• A PowerPoint slide deck as a point of reference for introduction to key concepts
• A BlackLine training instance for all live demonstrations
• A participant workbook containing optional student activities (that can be completed in your instance)

All training materials will be provided in US English. Any translation of training materials may be quoted at additional fees.

Can the demonstrations be done in my organization’s BlackLine instance?
Since the content and leading practices included in this course are specifically designed to relate to a wide variety of industries and use cases, demonstrations will be conducted in a BlackLine training instance. We combine standard instructor demonstrations with hands-on activities that can be completed in your instance. (Note: the Train-the-Trainer format includes a Facilitator’s Guide that contains information on timing and how to deliver the class in your instance.)

Which BlackLine version will the Train-The-Trainer Toolkit reference?
This toolkit (courseware) is licensed for the BlackLine version at the time of delivery.

To learn more, contact blu@blackline.com.