COURSE RECOMMENDATION BY PROCESS/WORKFLOW
WINTER 2019
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Below are several common processes and the corresponding eLearning modules that provide education about these processes and how to execute each in EnterpriseIQ.

**Customer Service – Sales Quote Entry to AR Invoice**

I. Order Entry

*Create a Sales Quote for an item, create a Sales Order manually or from the quote.*

**Sales Quotations**
In this lesson, you will learn how to access and create new Sales Quotations, how to associate line items to the quote, basic options available in the sales quotation screen, how to convert a sales quote into a sales order and how to utilize user fields. Topics included:

1. Access and Create Sales Quotations
2. Utilize Sales Quotation Menu Options
3. Associate Items to a Sales Quotation
4. Convert a Sales Quote to a Sales Order
5. Utilize User Fields

**Sales Orders - Create**
In this lesson, you will learn how to create a sales order, how to add information to each area, associating items to the order and how to utilize other available options. Topics included:

1. Access the Sales Order Module
2. Create a New Sales Order
3. Utilize Options in the Header Section
4. Populate the Line Item Section
5. Generate Releases
6. Utilize Sales Order Options

**Sales Orders – Generate Releases**
In this lesson, you will learn how to generate Sales Order releases including the 4 ways to generate a release and how to utilize available options for releases. Topics included:

1. Create a New Sales Order
2. Identify the 4 Ways to Generate a Release
3. Manually Generate a Sales Order Release
4. Utilize the Copy/Paste Option
5. Utilize the Drag and Drop Option
6. Utilize the Release Wizard Option
7. Update Existing Releases
8. Utilize the Overwrite Option

**Capable to Promise**
In this lesson, you will learn about Capable to Promise in EnterpriseIQ including the two methods of accessing and executing CTP, the parameters available, and understanding the CTP Routing Diagram.

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Topics included:
1. Utilize CTP via a Sales Order
2. Understand Parameters Available
3. Utilize Quick Order Entry CTP
4. Understand Parameters Available
5. Understand the CTP Routing Diagram

II. Inventory

*Maintain AKA Inventory records and pricing for inventory items including Standard Cost.*

**Inventory - Pricing Hierarchy**

In this lesson you will have instruction for the pricing hierarchy utilized by EnterpriseIQ including how to configure the different pricing types and accessing options available. Topics included:

1. Understand Pricing Types
2. Setup Tiered Pricing
3. Setup AKA Pricing
4. Setup Buy/Sell Pricing
5. Setup Standard Item Pricing
6. Setup Customer Pricing Override
7. Setup Pricing from System Parameters

**Inventory - AKA Buying Tab**

In this lesson, you will learn how to access AKA Buying Price Breaks, creating AKA Buying Price Breaks, and available options on the AKA Buying tab. Topics included:

1. Access AKA Buying Breaks
2. Overview of AKA Buying tab
3. Create an AKA Buying Price Break — Quantity
4. Associate a Vendor to the Price Break
5. Associate VMI Locations to the Price Break
6. Utilize User Fields
7. Utilize the Documents tab

**Inventory - AKA Selling Tab**

In this lesson, you will learn about the AKA Selling tab including how to add, edit, clone and delete AKA information for specific items and customers, setting up price breaks for specific items and Quantity Breaks. Topics included:

1. AKA Selling Information
2. Locate Material in Master Inventory
3. AKA Selling
4. Create New AKA Selling Items
5. Clone AKA Items

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6. Edit AKA Fields
7. Affect Quantity and Price Information
8. Retire AKA Selling Information
9. Set Buy/Sell Pricing

Standard Costing - Setup
In this lesson, you will learn about the setup required in EnterpriseIQ to calculate the Standard Cost for items including how to create and set default GL Accounts, creating cost elements and assigning GL accounts to them, assigning overhead costs to MFG Types, Cells and inventory items and assigning labor costs to MFG Types, Cells and inventory items. Topics Included:

1. Set System Parameter Settings
2. Create and Set Default GL Accounts
3. Create Cost Elements & Assign GL Accounts
4. Assign Overhead Costs to MFG Types
5. Assign Overhead Costs to Work Centers
6. Assign Cost Elements to Raw Materials
7. Assign Labor Cost Elements & Rates to MFG Types
8. Assign Labor Cost Elements & Rates to MFG Cells
9. Assign Overhead Costs to Items
10. Create Outsource Cost Elements
11. Assign Outsource Cost Elements to OS Items

Standard Costing - Calculation
In this lesson, you will learn how to execute Standard Cost calculations in EnterpriseIQ for purchased and manufactured inventory items and covers available options and filters. Topics Included:

1. Utilize Standard Cost Options
2. Calculate Standard Cost for Purchased Items
3. Calculate Standard Cost for Manufactured Items

III. AR Invoice

*Create an AR Customer Record and manage their Credit Data.*

Customer Maintenance
In this lesson, you will learn how to access the module, how to create a new customer, how to search for existing customers, creating a new contact, creating a customer template and utilizing the various tabs available. Topics included:

1. Access the Customer Maintenance Module
2. Create a New Customer
3. Search for an Existing Customer
4. Create a Customer Contact
5. Utilize the Credit Status Tab
6. Utilize the Auto Invoicing Tab
7. Utilize the Forms/Reports Tab

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8. Utilize the Miscellaneous Tab
9. Create a new Ship To Address
10. Utilize Options on the Details Sub-Tab
11. Associate a Customer to a Ship To Address
12. Utilize Options on the Distribution Sub-Tab
13. Utilize remaining Sub-Tabs for the Ship To Tab
14. Create a new Bill To Address
15. Create a Customer Template

Customer Maintenance - Credit Data Tab
In this lesson, you will learn how to create a customer record, assign an EPlant, assign a group ID, enter customer specific information and complete the credit data information. Topics included:

1. Create a New Customer Number
2. Assign an EPlant
3. Assign a Group ID
4. Enter Customer Information
5. Additional Customer Credit Data Options

Create and post an AR Invoice for a customer.

Accounts Receivable Invoice
In this lesson, you will learn about creating an AR Invoice, fields available in the AR Invoice Screen, moving an invoice to a GL Account, the Invoice Note option, available jump to functionality, using the cost source tool, available options and how to place an AR Invoice on hold. Topics included:

1. Access the AR Invoice Module
2. Understand General Fields
3. Associate Line Items to the Invoice
4. Access All Sales Accounts
5. Utilize an Invoice Note Field
6. Utilize Jump to Functionality
7. Access the Cost Source Tool
8. Utilize Invoice Speed Buttons
9. Access the Options Menu
10. Place an Invoice on Hold

IV. Cash Receipt

Issue a Cash Receipt for payment received against the AR Invoice from the customer.

Cash Receipts
In this lesson, you will learn how to navigate to the Cash Receipts module, create a new payment, select the correct method for entering invoices, apply cash, apply prepayments, and write off bad debt. Topics Included:

1. Navigate to Cash Receipts and Basic Information
2. Create a New Payment
3. Select Method for Entering Invoices

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4. Applying Cash – Show Open Accounts Method
5. Applying Cash – Invoice Number Method
6. Applying Cash – By Packing Slip Method
7. Applying Prepayments – “Enter on Account”
8. Selecting Invoices – VMI Reference Number
9. Write off Bad Debt
10. Viewing Different Totals in Cash Receipts
11. Selecting Options for Module Effectiveness
12. Posting a Cash Receipts Group
Purchaser – Inventory Management to Vendor RMA

I. Inventory Management

*Check inventory items via Transactions and Locations and the Material Exception List to create purchase orders for required materials.*

**Inventory - Transactions and Locations**

In this lesson, you will learn how to access the module, different quantity types, creating inventory locations, managing inventory including how to add, remove and move inventory items, how to utilize the Scrap option when removing inventory, removing locations, viewing the transaction log and other Transactions & Locations options. Topics included:

1. Access the Transactions & Locations Module
2. Identify Quantities Types
3. Create Locations, Add, Move & Remove Inventory
4. Add and Remove MFG Inventory
5. Mark Items Removed as Scrap
6. Remove Locations & View the Transaction Log
7. Utilize other Location Options

**Material Exception List**

In this lesson, you will learn the basic functionality for the Projected Exception, Requirements on Past Due PO’s, Raw Material Below Minimum, Outsource Material Below Minimum and Ideal vs Existing tabs. Topics included:

1. Access the Material Exception List
2. Utilize the Projected Exception Tab
3. Utilize the Requirements on Past Due PO’s Tab
4. Setup for Outsource Material Below Minimum
5. Utilize the Ideal vs. Existing Tab

II. PO / Receiving

*Enter a purchase order for the item.*

**Purchase Orders – Create and Receive**

In this lesson, you will learn how to access the module, an overview of the PO home screen, how to create and receive against a PO and how to post rejects against a PO Receipt. Topics included:

1. Access the Purchase Order Module
2. Understand the Purchase Order Screen
3. Create a Purchase Order and Releases
4. Receive against a Purchase Order
5. Post Rejects against a Purchase Order
Purchase Orders - Clone
In this lesson, you will learn how to clone an existing purchase order to create a new purchase order.
Topics included:

1. Clone a Purchase Order

Approve a PO via workflow - if the person who enters the purchase order cannot approve the workflow it will need to be approved

Quality Basics
In this lesson, you will learn how to create and delete Team Members, how to create a Workflow template, how to delegate and replace workflow responsibilities for Team Members, using Team Member and Workflow options and how to use a workflow template to push a purchase order through the approval process. Topics included:

1. Use Team Members in EnterpriseIQ
2. Create or Delete a Team Member
3. How to Set Team Members Options
4. Use Workflow in EnterpriseIQ
5. Create a Workflow Template
6. How to Set Workflow Template Options
7. Approve a PO with a Workflow Template

Purchase Orders – Approve w/ Workflow
In this lesson, you will learn how to create a PO workflow template, create and delete Team Members, and approving a PO with a workflow template. Topics included:

1. Create a PO Workflow Template
2. Create and Delete Team Members
3. Approve a PO using a Workflow Template

Vendor RMA - If an RMA is required for a PO issued to a Vendor, a Vendor RMA can be created.

Vendor RMA
In this lesson, you will learn an overview of the Vendor RMA process, creating RMA Return Codes, creating a Vendor RMA and the options available for inventory, creating a manual packing slip via the Vendor RMA, issuing a debit memo against the Vendor RMA, how to close a Vendor RMA and view closed Vendor RMA’s. Topics included:

1. RMA Process
2. Setup an RMA Return Code
3. Create a Vendor RMA
4. Return or Scrap Inventory
5. Return Inventory via Manual Packing Slips
6. Update the PO on the RMA
7. Create an AP Debit Memo
8. Close the Vendor RMA
9. View Closed Vendor

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Accounting – GL Setup, AR and AP General Functions

I. General Ledger

Account, Bank and General Ledger Creation for use throughout accounting modules with the General Journal.

Account Type Maintenance
In this lesson, you will learn how to access the account maintenance screen, create a sub account. Topics included:
1. Identify Major Account Types
2. Access Account Type Maintenance
3. Understand Account Type Maintenance Functions
4. Understand Sub-Account Functionality
5. Create a Sub-Account

General Ledger - Account Structure
In this lesson, you will learn an overview of the standard structure of General Ledger (GL) accounts including an explanation of the structure and how to set up a new GL account structure. Topics included:
1. Understand GL Account Structure
2. Access GL Account Structure
3. Define a GL Account Structure
4. General Ledger Account Structure Example
5. Save the Account Structure

Bank Maintenance
In this lesson, you will learn how to access the Bank Manager, various fields available, how to create new bank and bank account records, how to reconcile a bank account, utilizing the check register, how to print bank reports. Topics included:
1. Access the Bank Manager Module
2. Utilize Bank Information Fields
3. Create Bank and Bank Account Records
4. Utilize the Reconcile Option
5. Utilize the Check Register
6. Print reports

General Ledger – Create a Fiscal Year
In this lesson, you will learn how to setup a fiscal year. Topics included:
1. Create a New Fiscal Year
2. Assign an EPlant to a Fiscal Year

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3. Access the GL Year Picklist

General Journal
In this lesson, you will learn how to create three of the four types of general journal entries and explaining their purpose and functionality. Topics included:

1. General Journal Entry Types
2. Access the General Journal Entry Module
3. Creating a Free Form General Journal Entry
4. Review Unposted Journal Entries
5. Posting Journal Entries
6. Create a Journal Entry Using Templates
7. Creating Recurring Journal Entries
8. Creating Reversing Journal Entries

Create Financial Reports to be utilized throughout the fiscal year.

Financial Reports
In this lesson, you will learn the different report types available, creating detail and summary financial reports and how to print financial reports. Topics included:

1. Understand Financial Report Types
2. Create a Detailed Financial Report
3. Create a Summary Financial Report
4. Print Financial Reports

II. AR Functions

Create an AR Invoice, manage customer credit data, process AR Invoices, issue cash receipts and issue a Customer RMA as needed.

Customer Maintenance - Credit Data Tab
In this lesson, you will learn how to create a customer record, assign an EPlant, assign a group ID, enter customer specific information and complete the credit data information. Topics included:

1. Create a New Customer Number
2. Assign an EPlant
3. Assign a Group ID
4. Enter Customer Information
5. Additional Customer Credit Data Options

Accounts Receivable Invoice
In this lesson, you will learn about creating an AR Invoice, fields available in the AR Invoice Screen, moving an invoice to a GL Account, the Invoice Note option, available jump to functionality, using the cost source tool, available options and how to place an AR Invoice on hold. Topics included:

1. Access the AR Invoice Module
2. Understand General Fields

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3. Associate Line Items to the Invoice
4. Access All Sales Accounts
5. Utilize an Invoice Note Field
6. Utilize Jump to Functionality
7. Access the Cost Source Tool
8. Utilize Invoice Speed Buttons
9. Access the Options Menu
10. Place an Invoice on Hold

Accounts Receivable - Processing
In this lesson, you will learn how to create an invoice, add a packing slip, add an invoice note and post an invoice. Topics included:

1. Create a New Invoice
2. Adding a Packing Slip to an Invoice
3. Adding an Invoice Note
4. Posting the Invoice

*When payment is received against the AR Invoice, a Cash Receipt will be issued to the customer.*

Cash Receipts
In this lesson, you will learn how to navigate to the Cash Receipts module, create a new payment, select the correct method for entering invoices, apply cash, apply prepayments, and write off bad debt. Topics included:

1. Navigate to Cash Receipts and Basic Information
2. Create a New Payment
3. Select Method for Entering Invoices
4. Applying Cash – Show Open Accounts Method
5. Applying Cash – Invoice Number Method
6. Applying Cash – By Packing Slip Method
7. Applying Prepayments – “Enter on Account”
8. Selecting Invoices – VMI Reference Number
9. Write off Bad Debt
10. Viewing Different Totals in Cash Receipts
11. Selecting Options for Module Effectiveness
12. Posting a Cash Receipts Group

*A Customer RMA can be issued as needed against a shipment or AR Invoice.*

Customer RMA
In this lesson, you will learn about the Customer RMA (Return Material Authorization) module including creating an RMA, assigning an item to the RMA, utilizing the Repair Work Order and MFG Rework Order tabs, posting a receipt against the RMA, creating Failure and Return Codes and issuing a credit memo.

Topics included:

1. Create the Customer RMA
2. Understand the RMA screen
3. Set the RMA Limit for a User
4. Assign an Item to the RMA
5. Utilize the Repair Work Order tab
6. Utilize the MFG Rework Order tab
7. Utilize the Return to Inventory Option
8. Utilize the Scrap Option
9. Utilize the Repair Option
10. Utilize the Pending Evaluation Option
11. Create Failure Codes
12. Create Return Codes
13. Issue a Credit Memo for the RMA

III. AP

Issue an Cash Disbursement against an Invoice from a Vendor and manage the Vendor record.

Accounts Payable Invoice
In this lesson, you will learn how to generate, post or void an AP Invoice, utilizing the Auto Invoicing option, generating a Quick AP Invoice and the basics of the AP Invoice screen. Topics Included:
   1. Understand the AP Invoice Screen
   2. Generate and Post an AP Invoice
   3. Utilize the Auto Invoice Option
   4. Generate a Quick AP Invoice
   5. Void an AP Invoice

Cash Disbursements
In this lesson, you will learn how to create a new cash disbursement group, create manual and system generated checks, make prepayments to a vendor, print checks and post the cash disbursement group. Topics included:
   1. Access the Cash Disbursement Module
   2. Create a Cash Disbursement Group
   3. Generate a Quick Check
   4. Generate a Check for a Vendor
   5. Generate a Check with “Select All Vendors”
   6. Generate a Check with “Select from Invoice”
   7. Print Checks and Post Group

Vendor Maintenance
In this lesson, you will learn about the Vendor Maintenance module. It will cover the rating, freight, miscellaneous, forms and reports, remittance, contacts, user fields, and documents tabs located in the vendor module. Topics included:
   1. Vendor Maintenance
   2. Access the Vendor Maintenance Module
   3. Vendor Basic Information

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4. Vendor Rating Tab  
5. Vendor Freight Tab  
6. Vendor Miscellaneous Tab  
7. Vendor Forms/Reports Tab  
8. Vendor EPlant Specific Settings  
9. Vendor Remittance Tab  
10. Vendor Contact Tab  
11. Vendor User Field Tab  
12. Vendor Documents Tab  
13. Vendor Speed Buttons and Menus
Production Scheduler / Supervisor – Scheduling to Production Reporting

I. Schedule

Configure the Shop Calendar to generate work orders based on the shifts configured.

Shop Calendar – Configure
In this lesson, you will learn how to configure the Shop Calendar in EnterpriseIQ including how to schedule holidays, days off and shifts. Topics included:

1. Configure Shop Calendar Shifts
2. Configure Holidays
3. Configure Days Off

Set the Standard, Whiteboard and Whiteboard Labor Capacity to establish the schedule of hours and labor hours available.

Shop Calendar - Standard Labor Capacity
In this lesson, you will learn how to configure standard labor hours for manufacturing types as well as analyzing actual labor hours vs available hours. Topics included:

1. Access the Standard Labor Capacity Tool
2. Navigate the Standard Labor Capacity Tool
3. Add and Edit Line Items
4. Apply Line Items in Labor Capacity Planning

Whiteboard Capacity and Labor Whiteboard Capacity Planning
In this lesson, you will learn about Whiteboard Capacity and Labor Whiteboard Capacity Planning tools available including setup, calculations utilized and screen descriptions for each. Topics included:

1. Set Capacity Whiteboard Thresholds
2. Set Standard Labor Capacity
3. Understand the Capacity Planning Screen
4. Understand the Labor Capacity Planning Screen

Determine if materials will be required to produce work orders to be placed on the schedule.

Daily Material Staging Requirements
In this lesson, you will learn how to access and how to run several Material Staging reports. Topics included:

1. Access Daily Material Staging Requirements
2. Run a Material Staging Report

Material Exception List

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In this lesson, you will learn the basic functionality for the Projected Exception, Requirements on Past Due PO’s, Raw Material Below Minimum, Outsource Material Below Minimum and Ideal vs Existing tabs. Topics included:

1. Access the Material Exception List
2. Utilize the Projected Exception Tab
3. Utilize the Requirements on Past Due PO’s Tab
4. Setup for Outsource Material Below Minimum
5. Utilize the Ideal vs. Existing Tab

II. Work Orders

*Generate work orders via running update schedule or manually create a work order to place on a work center in the Finite Schedule, RealTime Production Monitoring or Assembly Track.*

**Work Orders - Create**

In this lesson, you will learn how to create a work order, how to firm work orders, the differences between the three types of work orders, hard allocating materials to a work order, creating a manual work order, printing a work order and utilizing the Sub MFG # option. Topics included:

1. Identify the Three Types of Work Orders
2. Access the Work Order Module
3. Understand the Work Order screen
4. Create a Manual Work Order
5. Firm a Work Order
6. Utilize the Sub MFG# Option
7. Hard Allocate Material to a Work Order
8. Print a Work Order

**Finite Scheduling**

In this lesson, you will learn how to schedule jobs, manually enter a work order into the schedule, run auto load, and edit and move work orders. Topics include:

1. Navigate the Finite Manufacturing Scheduling Module
2. Scheduled Jobs Details
3. Manually Enter Work Order into Schedule
4. Run Auto Load
5. Edit and Move Work Orders

**Assembly Track**

In this lesson, you will learn how to create an Assembly process, attach a process to a BOM, schedule a work order, report production, report rejects, and backflush materials consumed. Topics include:

1. Identify Three Assembly Manufacturing Types
2. Create an Assembly Process
3. Add an Assembly Process to a BOM
4. Add a Work Order to Assembly Track
5. Finite Schedule Process Work Orders

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6. Report Labor, Rejects and Backflush Components
7. Report Good Parts and Close the Work Order

III. **RealTime**

*To utilize RealTime Monitored work centers, they must be connected to RealTime before work orders can be visible in the RealTime Production Monitoring screen.*

*RealTime Process Monitoring can also be utilized to view charts for machines and set alarms, additional setup is required.*

RealTime Setup and Monitoring

In this lesson you will learn how to import a RealTime license, assign a RealTime address to a work center, schedule a work order for a RealTime monitored work center, report production, backflush components and report rejects. Topics include:

1. Import a RealTime License
2. Assign a RealTime Address to a Work Center
3. Schedule Work Order on a RealTime Work Center
4. Basics of RealTime Monitoring Screen
5. Report Production in RealTime
6. Backflush Options for RealTime Production
7. Reject Parts and Components
8. Close Downtime Intervals in RealTime

RealTime Process Monitoring

In this lesson, you will learn how to perform RealTime Process Monitoring including RT Charts, Capabilities, Alarms, Historic Charts, SPC Charts, Machine Setup, Monitor, Material Setup and RT Charts Security. Topics included:

1. Overview
2. RT Charts
3. Capabilities
4. Alarms
5. Historic Charts
6. SPC Charts
7. Monitor
8. Material Setup
9. Machine Setup
10. RT Charts Security

V. **Production Reporting**

*Production can be reported against work orders in the various modules below. The Production Reporting by Shift and Production Reporting by Work Order are the most popular but Assembly Track, RealTime, WMSIQ and IQRF are other utilities that can be used to report production.*

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Production Reporting
In this lesson, you will learn how to perform production reporting by shift, work order and by utilizing the Production Reporting Assistant. This lesson will also include steps to manually and automatically disposition, backflush and reverse disposition items in inventory. Topics included:

1. Production Reporting Parameters by Shift
2. Production Reporting by Shift
3. Production Reporting Parameters by Work Order

Assembly Track
In this lesson, you will learn how to create an Assembly process, attach a process to a BOM, schedule a work order, report production, report rejects, and backflush materials consumed. Topics include:

1. Identify Three Assembly Manufacturing Types
2. Create an Assembly Process
3. Add an Assembly Process to a BOM
4. Add a Work Order to Assembly Track
5. Finite Schedule Process Work Orders
6. Report Labor, Rejects and Backflush Components
7. Report Good Parts and Close the Work Order

RealTime Setup and Monitoring
In this lesson you will learn how to import a RealTime license, assign a RealTime address to a work center, schedule a work order for a RealTime monitored work center, report production, backflush components and report rejects. Topics include:

1. Import a RealTime License
2. Assign a RealTime Address to a Work Center
3. Schedule Work Order on a RealTime Work Center
4. Basics of RealTime Monitoring Screen
5. Report Production in RealTime
6. Backflush Options for RealTime Production
7. Reject Parts and Components
8. Close Downtime Intervals in RealTime

WMSIQ
In this lesson, you will learn how he basic functionality of WMSIQ, known as Warehouse Management System for EnterpriseIQ including an overview of the configuration of User Profiles and Menu Access, importing a scanner license file and available actions for the Search, Move, Receive, Ship, Disposition, Transactions, Physical Inventory, Print Labels and RealTime options from the home screen. Topics included:

1. Overview of WMSIQ, IQRF and Home Screens
2. Import a Scanner License File
3. Setup for WMSIQ Users – User Profiles
4. Search Menu Options in WMSIQ
5. Move Menu Options in WMSIQ

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6. Receive Menu Options in WMSIQ
7. Ship Menu Options in WMSIQ
8. Disposition Menu Options in WMSIQ
9. Transactions Menu Options
10. Physical Inventory Menu Options in WMSIQ
11. Configure Print Labels Option
12. RealTime Menu Options

IQRF

In this lesson, you will learn how the basic functionality of the IQRF System for EnterpriseIQ including an overview of the configuration of User Profiles and Menu importing a scanner license file and available actions for the Search, Move, Receive, Ship, Disposition, Transactions, Physical Inventory, Print Labels and RealTime options from the home screen. Topics included:

1. Overview of IQRF, IQRF and Home Screens
2. Import a Scanner License File
3. Setup for IQRF Users – User Profiles
4. Search Menu Options in IQRF
5. Move Menu Options in IQRF
6. Receive Menu Options in IQRF
7. Ship Menu Options in IQRF
8. Disposition Menu Options in IQRF
9. Transactions Menu Options
10. Physical Inventory Menu Options in IQRF
11. Configure Print Labels Option
12. RealTime Menu Option
Quality (Q&A) – Setup to Utilizing Quality Modules

I. Team Members and Workflow Setup

Setup Team Members and Workflows to be used throughout Quality modules in EnterpriseIQ.

Quality Basics

In this lesson, you will learn how to clone an existing purchase order to create a new purchase order. Topics included:

1. Use Team Members in EnterpriseIQ
2. Create or Delete a Team Member
3. How to Set Team Members Options
4. Use Workflow in EnterpriseIQ
5. Create a Workflow Template
6. How to Set Workflow Template Options
7. Approve a PO with a Workflow Template

Document Control – Maintain documents via Document Control that can be used throughout the system on the External Documents tab available throughout EnterpriseIQ.

Document Library 1 – Creating a Document Library

In this lesson, you will learn about the different document control libraries and how to create and configure the library. Topics included:

1. Know What Doc Control Is
2. Identify the 4 Types of Doc Control Libraries
3. Create a Library
4. Select a Workflow for the Library
5. Convert a Document to PDF
6. Set a Library Path
7. Set the Option Team Members Only
8. Configure Mandatory Settings

Document Library 2 – Adding Documents

In this lesson, you will learn the different ways to add a document into a library. Topics included:

1. Add a Document to Libraries
2. Check In Documents
3. Approve a Document to Add
4. Add Multiple Documents at Once

Document Library 3 – Workflow

In this lesson, you will learn how to create a workflow template for the document authorization within Document Control. Topics included:

1. Access Workflow Templates
2. Understand the Workflow Template
3. Utilize Workflow Elements
4. Assign a Workflow Template to a Library
5. Approve a Document with Workflow
6. Sign Off a Workflow Document

Document Library 4 – Team Members
In this lesson, you will learn how to access team members, add and configure a team member, provide availability in different Enterprise IQ modules, setup out of office delegates, replace and delete workflow responsibilities and access team member from different modules. Topics included:

1. Access the Team Members module
2. Access Team Members from Workflow
3. Configure Team Members
4. Utilize the Option “Check all Used In”
5. Utilize the Option “Out of Office”
6. Configure the Workflow Calendar
7. Modify Workflow Responsibilities
8. Access the My Workflows Menu

Quality Modules – Create a CAR, MRB, Deviation or ECO record in EnterpriseIQ utilizing the Team Members and Workflows created.

CAR – Corrective Action Report
In this lesson, you will learn how to access the module, how to create a new CAR, how to associate items to the CAR, how to add an image to the CAR, how to utilize the Documents tab on the CAR, how to create Team Members and approving a CAR with workflow. Topics included:

1. Access the Corrective Action Report Module
2. Create a new CAR
3. Enter Information for a CAR
4. Associate Items to a CAR
5. Utilize the Documents tab
6. Link an Image to a CAR
7. Approve a CAR w/ Workflow

MRB – Material Review Board
In this lesson, you will learn how to create an MRB via the two methods available, create an approval workflow template, associate an item, non-conform location, customer or vendor, create and close a Repair Work Order, create a MFG Rework Order and Bill of Material, approve the MRB via workflow and available Options and Filters. Topics included:

1. Create an MRB – Two Methods
2. Create an MRB Workflow Approval Template
3. Associate an Item and Non-Conform Location
4. Associate a Customer or Vendor
5. Create a Repair Work Order for Labor/Materials
6. Associate a Failure Code

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7. Close the Repair Work Order
8. Create a MFG Rework Order and BOM
9. Associate a Non-Conform Location to the WO
10. Production Report against the Rework WO
11. Approve the MRB via Workflow
12. MRB Options and Filters

**Deviation**

In this lesson, you will learn how to create a Deviation, create a workflow template, set workflow template options and how to approve a Deviation utilizing workflow templates. Topics included:

1. Create a Deviation
2. Create a Workflow Template
3. Set Workflow Template Options
4. Approve a Deviation with a Workflow Template

**ECO – Engineering Change Order**

In this lesson, you will learn how to create different ECO’s, ECO Workflow Approval Templates and approving an ECO via Workflow. Topics included:

1. Understand Different ECO Types
2. Create an ECO Workflow Approval Template
3. Create an ECO-BOM
4. Approve and Apply and ECO BOM
5. Create and Approve an ECO-Equipment
6. Create and Approve and ECO – JobShop

**Inspection Setup** — Create an Inspection Setup to be utilized in the Quick Inspection module.

**Inspection Setup**

In this lesson, you will learn how to create an Inspection Setup for an inventory item, understanding the Inspection Setup home screen, outlining the different types of Inspections available, how to create different types of parameters, how to approve parameters, how to create an inspection group, how to configure a calculated parameter, and how to select Run Rules for the item. Topics included:

1. Understand the Inspection Setup Screen
2. Know the Different Types of Inspections
3. Select Run Rules for the Inspection Setup
4. Create and Approve Parameters
5. Create an Inspection Group
6. Associate a Gage or Device
7. Configure a Calculated Parameter

**Gages and Devices** — Configure Gages and Devices to be utilized in the Quick Inspection module.
Gages and Devices

In this lesson, you will learn how to create a Gage/Device, create a Gage Repeatability and Reproducibility (R&R), and setup gage calibration...Topics included:

1. Understand the Gage/Device Screen
2. Create a new Gage/Device
3. Configure Repeatability and Reproducibility
4. Configure Calibration for a Gage/Device
MES – Admin to Scheduling

I. Admin

Understanding Basic Navigation in EnterpriseIQ

Basic Navigation
In this lesson, you will learn how to log into Enterprise IQ, search for a record, use the navigation bar to move between records, identify what colors mean in a given module, use the different cursors for additional functionality, use help to search for a specific topic and reach out to IQMS for assistance.
Topics included:

1. Logging in and Navigating the Launcher Bar
2. Searching for Records
3. Navigating Records
4. Cursor Options
5. Help

Create IQAlert Actions and Groups to generate and email reports, evaluate workflow or run update schedule automatically.

IQAlert - Groups
In this lesson, you will learn how to create groups in IQ Alerts. You will also learn how to assign alerts to a specific group. Topics included:

1. Create an IQ Alert Group
2. Link Actions and Groups

IQAlert - Actions
In this lesson, you will learn how to create actions, add an action to the IQAlert screen and popular action functions including Email, Reports, Evaluate Workflow, MRO Work Orders, Update Schedule, Auto Load and utilizing the Replace Email Option. Topics included:

1. Create an Action
2. Add Action to the IQAlert screen
3. Email
4. Reports
5. Evaluate Workflow
6. MRO Work Orders
7. Update Schedule and Auto Load
8. Replace Email Option

Security Inspector – System Deny Role
In this lesson, you will learn what a deny role does, how to access Security Inspector, how to create a system wide deny role, how to assign a deny role to a user and how to confirm the deny role is functional. Topics included:
1. Understand What a Deny Role Does
2. Access Security Inspector
3. Create a System Wide Deny Role
4. Assign a Deny Role to a User
5. Confirm a Deny Role is Functional

Security Inspector – Create New Users
In this lesson, you will learn how to create a new user, how to configure a security profile for a new user and how to configure passwords. Topics included:
1. Create a New User
2. Utilize Profile Options for a User
3. Create a Security Profile
4. Utilize the Option “Force Password Change”
5. Utilize the Password Policy Tab

Security Inspector – Lower Tabs
This training session provides detailed instruction for the Security Inspector module in EnterpriseIQ for the lower user tabs. This includes setting up the auto shut off limit, PO limits and access limits.
1. Utilize the General Tab
2. Utilize the CRM Tab
3. Utilize the PO Limit Tab
4. Utilize the RMA/Inv Limit and Excluded Inv Trans Tabs.
5. Utilize the Customer and Vendor Access Tabs
6. Utilize the Accessible EPlants Tabs
7. Utilize the My Alerts
8. Utilize the INV UD Class Access

II. BOM and Inventory
Create an inventory item and Bill of Material to generate work orders for Inventory items.

Inventory – Create a New Item
In this lesson, you will learn how to identify the 6 standard inventory classes, creating a new item, understanding required fields for inventory items, utilizing tabs available and cloning an inventory item. Topics included:
1. Identify the Six Standard Inventory Classes
2. Create a New Item
3. Understand Required Inventory Fields

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4. Understand Inventory Quantities
5. Utilize Inventory Sub-Tabs
6. Utilize Main Inventory Tabs
7. Clone an Inventory Item

**Bills of Material – Configuration**

In this lesson, you will learn how to access BOM's, set backflush parameters, identify different manufacturing types for Extrusion and how to create a Generic, Injection and Extrusion BOM’s. Topics included:

1. Understand BOM Information
2. Set Backflush Parameters
3. Identify Extrusion MFG Types
4. Create a Generic BOM
5. Create an Injection BOM
6. Create an Extrusion BOM

**III. Labeling**

*Create labels with Label Designer or Crystal Reports, then print labels for the items to be produced.*

**Label Hierarchy and Designer**

In this lesson, you will learn how to create a label using the Label Designer within EnterpriseIQ and the hierarchy EnterpriseIQ uses to determine which label to print. Topics include:

1. Three Locations for Printing Hierarchy
2. Printing from Inventory
3. Printing from RealTime, Packing Slips or Sales/Distribution
4. Printing from IQRF and WMSIQ
5. Label Designer

**Crystal Reports Basics with EnterpriseIQ**

In this lesson, you will learn the basics of using Crystal Reports with EnterpriseIQ including creating the IQORA Database Connection and Alias in IQStatus, connecting to the IQORA database in Crystal Reports, accessing tables and views and their associated data with Data Dictionary, basic table linking and adding a field to a Crystal Report.

1. Create the IQORA Database Connection
2. Access Tables in Data Dictionary
3. Access Views in Data Dictionary
4. Basic Options in Crystal Reports
5. Connect to the IQORA Database in Crystal Reports
6. Understand Basic Table Linking
7. Add a Table/Field to a Crystal Report

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IV. **Schedule**

Configure the Shop Calendar to generate work orders based on the shifts configured.

**Shop Calendar – Configure**
In this lesson, you will learn how to configure the Shop Calendar in EnterpriseIQ including how to schedule holidays, days off and shifts. Topics included:

1. Configure Shop Calendar Shifts
2. Configure Holidays
3. Configure Days Off

*Set the Standard, Whiteboard and Whiteboard Labor Capacity to establish the schedule of hours and labor hours available.*

**Shop Calendar - Standard Labor Capacity**
In this lesson, you will learn how to configure standard labor hours for manufacturing types as well as analyzing actual labor hours vs available hours. Topics included:

1. Access the Standard Labor Capacity Tool
2. Navigate the Standard Labor Capacity Tool
3. Add and Edit Line Items
4. Apply Line Items in Labor Capacity Planning

**Whiteboard Capacity and Labor Whiteboard Capacity Planning**
In this lesson, you will learn about Whiteboard Capacity and Labor Whiteboard Capacity Planning tools available including setup, calculations utilized and screen descriptions for each. Topics included:

1. Set Capacity Whiteboard Thresholds
2. Set Standard Labor Capacity
3. Understand the Capacity Planning Screen
4. Understand the Labor Capacity Planning Screen

*Determine if materials will be required to produce work orders to be placed on the schedule.*

**Daily Material Staging Requirements**
In this lesson, you will learn how to access and how to run several Material Staging reports. Topics included:

1. Access Daily Material Staging Requirements
2. Run a Material Staging Report

**Material Exception List**
In this lesson, you will learn the basic functionality for the Projected Exception, Requirements on Past
Due PO's, Raw Material Below Minimum, Outsource Material Below Minimum and Ideal vs Existing tabs. Topics included:
1. Access the Material Exception List
2. Utilize the Projected Exception Tab
3. Utilize the Requirements on Past Due PO's Tab
4. Setup for Outsource Material Below Minimum
5. Utilize the Ideal vs. Existing Tab

V. **Work Orders**

*Generate work orders via running update schedule or manually create a work order to place on a work center in the Finite Schedule, RealTime Production Monitoring or Assembly Track.*

**Work Orders - Create**
In this lesson, you will learn how to create a work order, how to firm work orders, the differences between the three types of work orders, hard allocating materials to a work order, creating a manual work order, printing a work order and utilizing the Sub MFG # option. Topics included:
1. Identify the Three Types of Work Orders
2. Access the Work Order Module
3. Understand the Work Order screen
4. Create a Manual Work Order
5. Firm a Work Order
6. Utilize the Sub MFG# Option
7. Hard Allocate Material to a Work Order
8. Print a Work Order

**Finite Scheduling**
In this lesson, you will learn how to schedule jobs, manually enter a work order into the schedule, run auto load, and edit and move work orders. Topics include:
1. Navigate the Finite Manufacturing Scheduling Module
2. Scheduled Jobs Details
3. Manually Enter Work Order into Schedule
4. Run Auto Load
5. Edit and Move Work Orders

**Assembly Track**
In this lesson, you will learn how to create an Assembly process, attach a process to a BOM, schedule a work order, report production, report rejects, and backflush materials consumed. Topics include:
1. Identify Three Assembly Manufacturing Types
2. Create an Assembly Process
3. Add an Assembly Process to a BOM
4. Add a Work Order to Assembly Track  
5. Finite Schedule Process Work Orders  
6. Report Labor, Rejects and Backflush Components  
7. Report Good Parts and Close the Work Order  

VI. RealTime  

To utilize RealTime Monitored work centers, they must be connected to RealTime before work orders can be visible in the RealTime Production Monitoring screen.  

RealTime Process Monitoring can also be utilized to view charts for machines and set alarms, additional setup is required.  

RealTime Setup and Monitoring  
In this lesson you will learn how to import a RealTime license, assign a RealTime address to a work center, schedule a work order for a RealTime monitored work center, report production, backflush components and report rejects. Topics include:  

1. Import a RealTime License  
2. Assign a RealTime Address to a Work Center  
3. Schedule Work Order on a RealTime Work Center  
4. Basics of RealTime Monitoring Screen  
5. Report Production in RealTime  
6. Backflush Options for RealTime Production  
7. Reject Parts and Components  
8. Close Downtime Intervals in RealTime  

RealTime Process Monitoring  
In this lesson, you will learn how to perform RealTime Process Monitoring including RT Charts, Capabilities, Alarms, Historic Charts, SPC Charts, Machine Setup, Monitor, Material Setup and RT Charts Security. Topics included:  

1. Overview  
2. RT Charts  
3. Capabilities  
4. Alarms  
5. Historic Charts  
6. SPC Charts  
7. Monitor  
8. Material Setup  
9. Machine Setup  
10. RT Charts Security