IQMS® eLearning

Manufacturing ERP

LIBRARY OF OFFERINGS

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Disclaimer

Contents

General

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

Smart Page

In this lesson, you will learn how to log into Smart Page, create a Dashboard, add shortcuts to a Dashboard, configure a BI Dashboard, configure a Chart, Run queries and KPI charts. You will also learn how to access Crystal Reports, RealTime Production Monitoring and access EnterpriseIQ modules. Topics Included:

1. Create a Smart Page Dashboard
2. Add EnterpriseIQ Module Shortcuts
3. Configure BI Dashboard
4. Create a KPI Chart
5. Access Crystal Reports
6. View RealTime Process Monitoring
7. Access Pending Workflows
8. Access EnterpriseIQ Modules
9. Clone a Smart Page

What's New V16 – Non -Accounting

This lesson provides detailed information about the non-accounting upgrades to EnterpriseIQ version 16. Topics included:

1. Added Security
2. The Inventory Module
3. Inventory Transactions and Locations
4. Labor and Overhead
5. Workflow
6. Forecasting
7. Sales and Distribution
8. View Dataset Information
9. RMA

What's New V16 – Accounting

In this lesson, you'll be introduced to version 16 accounting functionality within Enterprise IQ. Topics Included:

1. Inventory Activity Cost Journal
2. Multi-Currency
3. General Ledger Natural Accounts
4. Retro Pricing Tool
5. Updated Items

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

Implementation

Creating a Sales Order

In this lesson, you will learn how to create a sales order, add line items and complete the releases for the sales order. The fields and options associated with each section will be discussed in detail. Topics included:

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

Generating Sales Order Releases

In this lesson, you will learn how to create a sales order, and create a release manually, dragging and dropping the blanket quantity, copy and paste from a different sales order and by using the release wizard. You will also learn about the difference between append and overwrite. Topics included:

1. Create a New Sales Order
2. 4 Ways to Add a Release
3. Create a Manual Release
4. Copy and Paste an Existing Release
5. Drag and Drop the Blanket Quantity
6. Use the Generate Release Wizard

7. Append to an Existing Release Schedule
8. Overwrite an Existing Release Schedule

Pricing Hierarchy in EnterpriseIQ

In this lesson, you will learn about the five-level pricing hierarchy in EnterpriseIQ. You will also learn how to setup up each level. Topics included:

1. Pricing Hierarchies
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 the System Parameters

Managing the AKA Buying Tab

In this lesson, you will learn how to setup AKA buying breaks, set effective and inactive dates and set VMI locations for AKA Buying. Topics included:

1. Access AKA Buying Breaks
2. AKA Buying Breaks Fields
3. Insert Records
4. Vendor Selection
5. VMI Location
6. User Fields 1 and 2
7. Documents

Managing the AKA Selling Tab

In this lesson, you will learn about the AKA Selling functionality of the Inventory Master module. You will learn how to add, edit, clone and delete AKA information for specific items and customers. Also, how to set up price breaks for specific AKA items and how to set up price breaks for customers not using AKA selling. 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
6. Edit AKA Fields
7. Affect Quantity and Price Information
8. Retire AKA Selling Information
9. Set Buy/Sell Pricing

Managing the List of Lists in System Parameters

In this lesson, you will learn about many of the lists available in IQMS and how to add values to the list. Topics included:

1. Available Menu Options
2. The List of Lists Menu
3. Cost Elements
4. Divisions and Warehouses
5. Downtime Codes
6. Employee Level
7. Employee List
8. Inventory Classes
9. Inventory Locations
10. Inventory Trans Codes
11. Inventory UOM
12. Labor Codes
13. Manufacturing Cells
14. Manufacturing Types
15. Non-Allocate Codes
16. Non-Conform Codes
17. PO Miscellaneous Items List
18. PO Types
19. Reject Codes
20. Salespersons
21. Ship Via
22. Tax Codes
23. Terms

Emailing a PO

In this lesson, you will learn how to email a vendor PO manually and configure IQ Alerts to email the PO automatically. Topics included:

1. Manually Email a Purchase Order
2. Enable a Vendor Contact for Auto Email PO
3. Create an IQ Alert to Generate Auto Email Message
4. Enable Auto Email in Print PO Dialog Box

Creating and Receiving Purchase Orders

In this lesson, you will learn how to create a PO, insert items for purchase, create releases, receive or reject from the PO and posting the receipt. Topics included:

1. Purchase Orders and Receipts
2. Access the Purchase Orders Module
3. Create Purchase Order and Release
4. Receive From a Purchase Order
5. Reject from a Purchase Order

The Purchase Order Color Chips

In this lesson, you will learn about the purchase order color chips in the details and releases sections. Topic included:

1. PO Color Chips

Clone an Existing Purchase Order

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

1. Cloning a Purchase Order
2. Clone a Purchase Order

Approve a PO Using a Workflow Template

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

Auto EForms in EnterpriseIQ

In this lesson, you will learn how about the different type of EForms which are available in EnterpriseIQ. Topics included:

1. Auto EForms
2. Auto EForms Options
3. AR Invoicing and EForms
4. System Parameters and EForms
5. Order Acknowledgement Options
6. Pack Slip EForm
7. Bill of Lading (BOL)EForm
8. Auto EForm Reports

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

Setting up a Shop Calendar

In this lesson, you will learn how to setup the shop calendar for number of shifts, days of the week and shift start times. You will also learn how to add holidays and days off on the shop calendar. Topics included:

1. Define Shift Information
2. Schedule Holidays
3. Schedule Days Off

Enabling Floor Backflush for a Work Center

In this lesson, you will learn how to enable Floor Backflush for a work center. Topic included:

1. Enabling Floor Backflush for a Work Center

Creating a Material Staging Report

In this lesson, you will learn how to navigate to and create the three material staging reports. Topics included:

1. Access the Daily Material Staging Requirements
2. Run a Material Staging Report
3. Run an Hourly Work Center Material Staging Report
4. Run a Material Staging Requirements Report

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
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

Outsourcing in EnterpriseIQ

In this lesson, you will learn about the outsourcing processes available within EnterpriseIQ including Outsource Central and two manual outsource processes. Topic included:

1. Outsource Central Screen Options
2. Understand Outsource Central Modes
3. Use the Outsource Central Setup Wizard
4. Using Outsource Central – Work Order Based
5. Understand the Manual Outsource Process
6. Manual Outsource Setup
7. Execute the PO Receiving Process
8. Execute the Production Reporting Process

WebBI

In this lesson, you will be introduced to IQMS WebBI, the Production Analytics Dashboard, What is in development, the basics of dashboards and the modeler portion of Oracles Business Intelligence Cloud Service. Topics included:

1. Introduction to IQMS WebBI
2. Production Analytics
3. Current State of Development
4. Dashboards
5. Modeler Portion
6. Complete Version of Training
7. Building of AdHoc Visualizations
8. Including External Data

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 Options

Physical Inventory in EnterpriseIQ

In this lesson, you will learn how to perform a physical inventory count in EnterpriseIQ using the two methods available, Full Physical and By Worksheet. Topics included:

1. Physical Inventory Options Menu
2. Full Physical Inventory Process
3. By Worksheet Inventory Process

System Administration

Creating a System Wide Deny Role

In this lesson, you will learn how to navigate to and create the three material staging reports. Topics included:

1. Deny Role Overview
2. Navigate to Security Manager
3. Create a System Wide Deny Role
4. Apply a Deny Role to a User
5. Verify the Deny Role

Creating an IQAlert Group

In this lesson, you will learn how to create groups in IQAlert. You will also learn how to link actions to an IQAlert group. Topics included:

1. Create IQ Alert Groups
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

Managing User Accounts

In this lesson, you will learn how to create a new user, manage individual passwords, lock a password and configure individual password policies. Topics included:

1. Generate New User
2. Set Security Profile
3. Force Password Change
4. Modify Password Policy
5. Generate New Security Profile

Manufacturing

Vendor RMA

In this lesson, you will learn how to setup RMA codes, create a vendor RMA, return to inventory, create a manual packing slip and debit memo and close an RMA. Topics included:

1. RMA Process
2. Setup an RMA Return Code
3. Create a Vendor RMA
4. Determine Location of Items to Return
5. Create New PO for Reshipped Items from Vendor
6. Create a Manual Packing Slip
7. Create an AP Debit Memo
8. Close a RMA
9. View Closed RMA

Creating and Managing a Work Center

In this lesson, you will learn how to create a work center and be introduced to the main data fields on the work center record. Topics included:

1. Work Centers
2. Create a Work Center
3. Set MRO Exclusions
4. Additional Work Center Information
5. Assign Cost Elements

Creating a Packing Slip

In this lesson, you will learn how to create a packing slip from the packing slip module. Packing slips are important because they begin the invoicing process and close the production loop. Topics included:

1. Navigate to the Packing Slip Module
2. Packing Slip Record
3. Create a Packing Slip from PS Module
4. Create a Packing Slip from Sales Module
5. Create a Certificate of Conformance
6. Print a Packing Slip
7. Void a Packing Slip

Pick Ticket Overview

In this lesson, you will learn how to create a picket ticket from the pick ticket module as well as from the sales module. It will also cover how to convert a pick ticket into a packing slip. Topics included:

1. Pick Tickets Overview
2. Adding Pick Tickets from the Pick Ticket Module
3. Adding Pick Tickets for the Sales Module

Inventory Transactions and Locations

In this lesson, you will learn how to add locations to an inventory item, move inventory from one location to another, add and remove inventory from locations, empty and delete locations and mark inventory as either Non-Conform, Non-Allocate or No Ship. Topics included:

1. Navigate and Select Inventory to Manage
2. Inventory Quantities Defined
3. Locations
4. Add a Location and Move Inventory
5. Add and Remove Inventory from Locations
6. Empty and Delete locations and View Transaction Logs
7. Mark Inventory as Non-Conform, Non-Allocate and No-Ship

Creating BOM's

In this lesson, you will learn how to create a generic BOM, create an injection BOM, determine backflush parameters, select the correct extrusion manufacturing type and create an extrusion BOM. Topics included:

1. Navigate to the BOM Module and Important Information
2. Create a Generic BOM
3. Select Backflush Parameters
4. Create an Injection BOM
5. Identify the Types of Extrusion BOM's
6. Create an Extrusion BOM

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 included:

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

Creating a Work Order

In this lesson, you will learn how to create a manual work order, create a one-off work order, hard allocate resources firm a work order and print a work order. Topics included:

1. Three Types of Work Orders
2. Navigate to the Work Order Module
3. Navigate a Work Order Form
4. Create a Manual Work Order
5. Create a One-Off Work Order
6. Hard Allocate Resources for a Work Order
7. Firm a Work Order
8. Print a Work Order

Setting up an Inventory Item

In this lesson, you will learn how to create a new inventory item, populate the required fields and clone an existing item. Topics included:

1. Six Standard Inventory Classes
2. Navigate and Create a New Record
3. Populate Required Fields
4. Inventory Quantities – Defined
5. Inventory Sub-Tabs
6. Inventory Tabs
7. Clone an Inventory Item

Maintenance, Repair and Overhaul

In this lesson, you'll learn how to create equipment, gages and devices and tools. How to create tasks, skills, checklists and MRO templates. How to assign tasks and templates to equipment and how to create and close MRO work orders. Topics include:

1. Navigating to the MRO Module
2. Equipment and Classes
3. Create Equipment in MRO
4. Hierarchy of MRO Work
5. Create Skills
6. Create Checklists
7. Create Tasks
8. Create Templates
9. Assign Tasks to Equipment
10. Add a Template to Equipment
11. Total Unit Section
12. Creating Work Orders

Label Hierarchy and Label 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

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

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

ShopData

In this lesson, you will learn about the available menu options, configuration and tasking in and out of work orders to report production and backflush materials. Topics included:

1. Understand ShopData Menu Options
2. Configure the ShopData Screen
3. RTScan to Inventory
4. Floor Disposition
5. Pallet Builder
6. Report Rejects
7. Downtime
8. Print RealTime, Sales Order or Inventory Labels
9. Quick Inspection
10. Serial Number Tracking
11. Inventory Transactions & Locations
12. MRO Work Orders
13. How to Task into a Work Order
14. Report Production, Reject Components & Parts
15. Task Out – Report Production

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

4. Production Reporting by Work Order
5. Production Reporting Assistant

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

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

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. 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

MRP – Rough Cut Capacity and Daily Projected Requirements

In this lesson, you will learn about MRP (Material Resource Planning) driven options including Rough Cut Capacity and Daily Projected Requirements. Topics included:

1. Understand Daily Projected Requirements
2. Understand Rough Cut Capacity

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

Ship Via Maintenance

In this lesson, you will learn about the Ship Via Maintenance module to be used in conjunction with Shipping Manager to process shipments. This includes how to create a Ship Via record and the options available in the Ship Via Maintenance screen. Topics included:

1. Access Ship Via Maintenance Records
2. Understand the Ship Via Maintenance Screen
3. Create Shipping Holidays
4. Utilize Recalculate Must Ship Dates Option

Quality

Creating, Managing and Responding to a Corrective Action Report

In this lesson, you will learn how to create, track and respond to a corrective action report. Topics included:

1. Access the Corrective Action Module
2. Generate a New CAR
3. Enter Header Information in a CAR
4. Specify Items to add to a CAR
5. Add an Image to a CAR
6. Attach Supporting Documents to a CAR
7. Activate a CAR
8. Create a Team
9. Respond to a CAR

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. Document Control Overview
2. Library Types
3. Library Setup – Define Library
4. Library Setup – Workflow
5. Library Setup – File Type
6. Library Setup – Library Location
7. Team Members Only
8. Mandatory Setting

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. Document Check-in
3. Add Multiple Documents
4. Check-In Multiple Documents
5. Using Other Modules to Check-in Documents

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. Workflow Template Overview
3. Workflow Template Fields
4. Workflow Elements
5. Setting a Workflow Template
6. Workflow Process Overview

7. Initiate Workflow
8. Document Sign-off and Review

Document Library 4 – Team Members

In this lesson, you will learn how to create team members, assign responsibilities, place team members out of office and assign team members for other EnterpriseIQ modules. Topics included:

1. Team Member Setup
2. All Used In setting
3. Out of Office Team Members
4. Calendar Setup
5. Replace Delete Workflow Responsivities
6. Accessing Team Members from Other Modules
7. My Workflows Menu

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 Member Options
4. Use Workflow Template
5. How to Set Workflow Template Options
6. Approve a PO 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

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
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

Accounting

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
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

Managing the Credit Status Tab

In this lesson, you will learn about the fields located on the credit status tab of the customer record, including credit limit and discounts, CRM opportunity and the sales analysis tool. Topics included:

1. Access Credit Status Tab
2. Credit Status
3. Credit Status Fields
4. Credit Limit and Discount
5. CRM Opportunity
6. Sales Analysis Tool

Customer Maintenance

In this lesson, you will learn how to create a customer record, assign terms, credit limits, and create contacts and a salesperson. You will also learn how to create a ship to and bill to address. Topics included:

1. Customer Maintenance Module
2. Search for a Customer
3. Create a New Customer
4. Credit Status Tab
5. Auto Invoicing Tab
6. Forms/Reports Tab
7. Miscellaneous Tab
8. Create a Contact
9. Ship To Tab
10. Ship To – Details Tab
11. Ship To – Contacts Tab

12. Ship To Distribution Tab
13. Ship To EDI, Forms/Reports, User Fields, Docs, VMI, Shipping Labels, Carrier Tabs
14. Bill To Tab
15. Create a Customer Template

Managing the 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

Setting up and Assigning Finance Charges

In this lesson, you will learn how to access, setup and generate finance charges for specific customers. Topics included:

1. Access the Finance Charge Setup Tabs
2. Set Finance Charge Parameters
3. Specify a GL Account for Finance Charges
4. Apply Finance Charges to a Customer

Creating and Posting an AR Invoice

In this lesson, you will learn about the customer invoice module. It will cover the general information, line item and notes sections. It will demonstrate how to post invoices for an individual user ID as well as all user IDs. It will also demonstrate how to link an invoice to a work order and place an invoice on hold. Topics included:

1. AR Invoice Introduction
2. AR Invoice General Fields
3. AR Line Item Section
4. Moving an Invoice to a GL Account
5. Invoice Note
6. Jump to Functionality
7. Cost Source Tool
8. Invoicing Speed Buttons
9. Options Menu
10. Placing an Invoice on Hold

Manually Process an AR Invoice

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

Managing the Account Maintenance Module

In this lesson, you will learn how to access the account maintenance screen, create a sub account. Topics included:

1. Access Account Type Maintenance
2. Major Account Types
3. Creating a Sub-Account
4. Account Type Maintenance Functions
5. The Function of Sub Account Types

Managing the Bank Manager

In this lesson, you will learn how to navigate to the bank manager module, create a bank and bank account, reconcile an account and access the check register. Topics included:

1. Access Bank Manager
2. Bank Information Fields
3. Creating Banks and Bank Accounts
4. Reconcile Accounts
5. Check Register
6. Print Reports
7. Inactive Banks and Bank Accounts

AR Processing Auto

In this lesson, you will learn how to enable auto invoicing on a specific customer record. Topics included:

1. Set up Auto Invoicing
2. Begin Auto Invoicing
3. Review all Invoices
4. Post All Invoices
5. Create Cash Receipts
6. Add the First Customer
7. Add Additional Customers
8. Review Customer Cash Receipts
9. Post Cash Receipts

Auto EForm PO

In this lesson, you will learn how to setup a vendor to for auto EForm. Topics included:

1. Auto EForm Purchase Orders
2. Setup Auto EForm PO Option
3. Identify a PR Created Through PO Module
4. Routing Based Workflow Approval

Creating a Fiscal Year in the General Ledger

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
3. Access the GL Year Picklist

Creating General Ledger Entries

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

Creating Financial Reports

In this lesson, you will learn how to create detailed and summarized financial reports and how to print them. Topics included:

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

Enable Auto Invoicing for a Specific Customer

In this lesson, you will learn how to enable auto invoicing on a specific customer record. Topic included:

1. Setup Auto Invoicing

General Ledger Account Structure

In this lesson, you will learn about the standard structure of General Ledger (GL) accounts. It also includes an explanation of the structure and how to set up a new GL account structure. Topics included:

1. General Ledger Account Structure
2. Access the GL Account Structure
3. General Ledger Account Structure Definition
4. General Ledger Account Structure Example
5. Save the Account Structure

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

Cash Disbursement

In this lesson, you will learn how to navigate to the Cash disbursements module, 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. Navigate & Introduction to Cash Disbursement
2. Creating a Cash Disbursement Group
3. Create a Check – Quick Check
4. Create a Check – Select from Vendor
5. Create a Check – Select all Vendors – Prepayment
6. Create a Check – Select from Invoice
7. Print Checks and Post Group

Fixed Assets

In this lesson, you will learn how to create book templates, import class lives and recovery periods, enter fixed assets, assign a template to a fixed asset, calculate depreciation on a fixed asset, view posted book information for fixed assets, retire & replace a fixed asset, prepare a GL entry and remove an unposted depreciation. Topics Included:

1. Create a Book Template
2. Import Class Lives and Recovery Periods
3. Enter a Fixed Asset
4. Assign a Template to a Fixed Asset
5. Clone a Fixed Asset
6. Retire a Fixed Asset
7. Prepare a GL Entry
8. View Posted Book Information
9. Remove an Unposted Deprecation

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

Human Resources

Time & Attendance

In this lesson, you will learn how to create pay types, pay groups, pay rules, employee badge logins, System Parameter settings, creating shifts, shift settings, clocking in and out, creating employee messages, tasking in and out, clock in and out maintenance, task in and out maintenance and pre-post log, Topics Included:

1. Setup Pay Types
2. Setup Pay Groups
3. Setup Pay Rules
4. Setup Pay Rules
5. Setup Shifts
6. Setup System Parameter Settings
7. Setup Create an Employee Badge #
8. Clocking In & Out
9. Clock In/Out Maintenance
10. Employee Task Messages
11. Taskin In & Out
12. Task Classes
13. Task Clock In/Out Maintenance
14. Time & Attendance Pre-post Log

Workforce

In this lesson, you will learn how to create training items, skills, job descriptions, training sessions, training records and job requisitions, report completed training for skills and maintain HR status codes.

1. Create a Training Item
2. Create a Skill
3. Create a Job Description
4. Create a Training Session
5. Create a Training Record
6. Create a Job Requisition
7. Report Completed Training
8. Create HR Status Cod