



Content Catalog
eLearning for DELMIAWorks
2023

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Learning Experience for DELMIAWorks provides eLearning product training for DELMIAWorks MES/ERP software including 5 Foundation & 8 Advanced Certification Tracks.

Please reach out to delmiaworks.elearning@3ds.com for a Certification Exam for any topic once the user has completed content.

We suggest that all users complete the Implementation Foundation Certification first before moving on to any other Certification track topics, however this may vary by users based on skill set and software experience.

DELMIAWorks Foundation Certifications

- Implementation
- Manufacturing
- System Admin
- Quality
- Accounting

DELMIAWorks Advanced Certifications

- Manufacturing I
- Manufacturing II
- Supply Chain I
- Supply Chain II
- Maintenance
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- Finance
- Production Engineer
- QMS I
- Human Resources



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DELMIAWorks Foundation Certifications

These sessions provide a high-level and dynamic introduction to DELMIAWorks topics, processes and common tasks. **We suggest all users, especially those new to DELMIAWorks, complete the DELMIAWorks Implementation Training Learning Path first.** Each topic has 1 Learning Path containing several modules, which are outlined below.

Implementation (Foundation)

Basic Flow & Navigation

In this session, the Basic Flow and Navigation for the DELMIAWorks system is covered, including launcher bar functionality, options & basic system navigation including module navigation & access, utilizing right-click menu options and how to configure user defined forms & user fields throughout the system.

System Parameters I

The first in a two part series regarding the System Parameters module within DELMIAWorks, this foundational overview provides an introduction to module basics, data that is required to be entered, options that will affect business processes and going live on the system.

System Parameters II

The second in a two part series for foundation overview training on System Parameters, users will learn about the extensive List of Lists that provide access to areas required for system setup throughout DELMIAWorks such as MFG Cells, MFG Types and PO Types.

Work Centers

The following session provides foundational instruction for Work Centers, including learning the importance of center types, assigning a Cost Center, and assigning an RT address for Production Monitoring. In addition, learn how to link the Work Center to the MRO module and understand the correlation between capacity planning and Shop Calendar.

Shop Calendar

The following session is the implementation foundation for setting up and maintaining Shop Calendar. Learn about the impact of Shop Calendar and EPlant Options, how Manufacturing Cell and Work Center options affects system capabilities, how to configure holidays and Standard Labor Capacity.

Manufactured Inventory

The following lesson provides an overview of Manufactured Inventory basics for users and covers how to locate manufactured inventory, reviewing MFG Inventory data, how to configure and assign UOM conversions to MFG items, reviewing information within the Inventory module and utilize Inventory Groups.



Purchased Inventory

This foundational overview lesson covers Purchased Inventory functionality within DELMIAWorks including how to define the on-hand amount which influence inventory availability, configuration for purchasing requirements, how to associate pricing via Buy/Sell Pricing and how to utilize the AKA Buying tab to associate vendors with specific price breaks.

Inventory Locations & Transactions

The following session provides a foundational overview for the Inventory Locations & Transactions module. Users will be introduced to module access & navigation basics, available location types and status flags, how disposition designators are configured and assigned throughout the system, when to use Lot#'s and how to read the Transaction Log.

Bills of Material

The following session provides a foundational level outline of the Bill of Material module, including how the manufacturing type affects the BOM structure and the fields required to create BOM's. Also, see how BOM structure affects specific departments and see how inventory & other components are added or linked to a BOM.

Sales Orders

The following session provides a foundational overview for the Sales Order module including module basics, adding items to sales orders, pricing hierarchy in relation to inventory items, how to generate releases with accurate Must Start Dates and the Quick Entry option.

Work Order Management

The following session provides a foundational overview on Work Order Management within DELMIAWorks. Users learn how to review a BOM to generate accurate Work Orders, the difference between manual and system-generated Work Orders, how delivery quantities affect Work Order start dates and Firm Work Orders functionality.

Finite Scheduling

The following session provides a foundational overview of the Finite Scheduling module including a detailed look at data available in the module to help assess scheduling capacity, how to add (schedule) or move (Edit) Work Orders, the System Parameter options that affect scheduling dates and modular relationships within DELMIAWorks.

Material Resource Planning

The following session provides a foundational overview of Material Resource Planning within DELMIAWorks including how demand generation affects material requirements generation, an overview of Projected Exceptions and the Material Exceptions List, how to create Purchase Orders from the requirements screen and system wide modular relationships.

RealTime Production Monitoring

The following session provides an overview about Real Time Production Reporting and Monitoring including understanding how the Shop Calendar & Production Reporting modules interact with RealTime, a demonstration of "custom views" within RealTime, key functions within the Individual Center View, important menu items, speed buttons & right click options and modular relationships throughout the system.



Production Reporting

The following session provides a foundational overview for Production Reporting by Shift including understanding how PRS picks up data from RealTime and the purpose of features found in the PRS screen. In addition, learn the difference between manual and auto-disposition functions and how PRS affects other modules in DELMIAWorks.

Packing Slips

The following foundational session provides users with an overview of Packing Slips (Sales Order) within DELMIAWorks and covers how to create packing slip records, important options & parameters and their use, how to create a shipment, how Pick Tickets and Custom Data are utilized and how shipments influence inventory levels and sales aspects within the system.

Purchasing

The following session provides new users with an overview of Purchase Order functionality including module access, creating new Purchase Orders, how to add items to a Purchase Order (3 methods), how to generate releases with Must Arrive By dates and modular relationships throughout DELMIAWorks.

Receiving

The following session provides a foundational overview of Receiving within DELMIAWorks including the difference between creating and posting receipts, how to review posting functions available, available options & parameters, how to void or reject receipts and viewing receiving tickets and labels.

Customer Maintenance

The following session provides a foundational overview on the Customer Maintenance module including customer record selection, data entry and maintenance, learn where critical accounting data is stored, and review essential parameters & options and modular relationships within DELMIAWorks.

Vendor Maintenance

The following session provides a foundational overview of the Vendor Maintenance module in DELMIAWorks including how to configure new Vendor records with required data, review available options for remittance, contact, accounting, freight, forms/reports and miscellaneous tabs and how those affect processes within the system.

GL Account Setup & Maintenance

The following session provides a foundational overview of GL Account configuration and maintenance for account structure, account types, general accounts, reference codes, GL Years and Periods within DELMIAWorks.

GL Defaults / Bank Maintenance Setup

The following session provides a foundational overview for GL Default accounts & the Bank Manager module within DELMIAWorks including how to configure GL Default accounts, their interaction with specific System Parameter options, how to access the Bank Manager and required maintenance tasks including reconciliation of bank accounts.



General Journal Entries (Beginning Balances)

The following session provides foundational information for General Journal Entry setup including how to set up beginning balances, the difference between group vs. batch, and Journal Entry Types. In addition, learn how to utilize templates.

Account Activity & Financial Reports

The following session provides a foundational overview of the module, trial balance reports and Financial Reporting for income statements and balance sheets. This session provides an overview of Account Activity and Financial Reports within DELMIAWorks, which includes reviewing the account activity screen and drill-down options within the module.

AR & AP Priors

The following session provides a foundational overview for Accounts Receivable and Accounts Payable Prior Invoices, including entering, posting, and voiding invoices in the DELMIAWorks system.

Manufacturing (Foundation)

MFG Types & MFG Cells Review

The following provides a foundational outline about Manufacturing Types and Manufacturing Cells within DELMIAWorks including configuration & maintenance tasks for MFG Types & MFG Cells, available MFG Types & how their Parameters affect production within the system, how to create a custom manufacturing type and how to utilize the BOM comparison field option.

Inventory Stocking Options

This training session provides users with a foundational overview regarding Inventory Stocking Options available within DELMIAWorks and includes a review of Reorder Point and Safety Stock options for purchased parts, replenishment features for manufactured items and how the Forecast module interacts with these options to provide valuable inventory stock information.

Inventory - Where Used

The following lesson provides a foundational overview of the "Where Used" Utility which includes, how to access the feature, understanding the relationship between parent and child item numbers, and viewing examples of where items can be traced in the system. In addition, see an example of how Sequential View is used, see a demonstration of the replace, and append features.

Alternate Items

The following session provides users with an overview of how Alternate Items are used in DELMIAWorks. Users will be shown the difference between two input methods and the setup required for an alternate item, how this feature interacts with the BOM and reporting modules and how this functionality can be fully utilized.

Physical Inventory

The following lesson provides a foundational overview for performing a Physical Inventory in DELMIAWorks, including the difference between the methods available, how to complete a Physical Inventory, and identifying the different ways to enter inventory counts. In addition, review how the Physical Inventory affects the transaction log.

Disposition Designators

The following lesson provides a manufacturing foundational overview of Disposition Designators for production in DELMIAWorks. Topics include how to view the disposition hierarchy, learn how to configure shipping and receiving disposition designators, gain a general understanding of how the MFG# and ITEM# default disposition designators differ, how Hard Allocations are marked in the system and viewing Disposition Designators information in the Transaction Log.

UOM Conversions

The following lesson provides a foundational outline regarding Unit of Measure (UOM) Conversion within DELMIAWorks for Inventory. Users will learn about configuration & maintenance tasks including how to convert an item's native UOM, how to access required documents to be updated after a UOM conversion is performed, how UOM affect purchase orders & sales orders, understand the risks associated with UOM conversions and recognize how UOM changes affect other areas of the system.



Assembly Process Maintenance

During this training session, Assembly Process Maintenance for ASSY manufacturing will be covered. Users will learn how to create a new process, be provided an overview of the data fields, parameters & options available and the effects of each on costs, work orders, production and throughput in the system.

Bill of Materials (ASSY)

The following session provides users with an overview regarding Assembly BOMs (ASSY) and covers the difference between ASSY & Generic BOMs, how the item details tab is structured, the importance establishing processes and how changes in the throughput time can affect aspects on the BOM.

Outsource Processes

The following session provides a foundational outline for **Outsource Processes**. Topics include understanding the four system setup steps, understanding the difference between the PO Based outsourcing method and the Work Order based outsourcing method, a demonstration of both these methods, reviewing the responsibilities involved in processing each step in the Outsource Process and understanding what outsourcing does to the associated inventory transactions.

Capable To Promise

The following lesson provides a manufacturing overview of the Capable to Promise & Available to Promise features within DELMIAWorks. Users will gain an understanding of the difference between CTP and ATP, learn what factors affect ATP and CTP and how to interpret CTP dates.

Work Order Hard Allocation

This training lesson outlines the process of Hard Allocating Material to a Work Order within DELMIAWorks and covers the purpose of hard allocating materials, various fields utilized with this process, how to execute hard allocation of materials to a work order and how to remove hard allocated components from a work order.

Finite Scheduling for ASSY Processes

The following lesson provides a foundational outline for setting up and maintaining Finite Schedule for Assembly Processes, which includes understanding the relationship between processes and BOM's on qualified work centers and seeing how Finite Schedule and Assembly Track interact. In addition, see how assembly processes can be added to the schedule and see how Autoload can help schedule processes.

Assembly Track

This training lesson provides a fundamental overview for Assembly Track, including configuration & maintenance tasks. Topics include how to identify Assembly and Generic manufacturing, ASSY work order functionality, reviewing the Processes Section and an overview of right-click options available.

ASSY Dispatch List

This training lesson provides training regarding the Assembly Dispatch List in DELMIAWorks. Users will be shown an overview of the Dispatch List and its functionality and how to add, update or delete assembly processes, how the Dispatch List and ASSYDATA (Assembly Data) modules work together, the steps to run update schedule and update processes and how to use Auto Load for scheduling.



Assembly Line Clearance

During this training session, users will learn about Line Clearance functionality for Assembly Track including an overview of benefits of Line Clearance for Assembly manufacturing, how Line Clearance and AssyData interact, how ASSY processes are used with Line Clearance and an overview of supervisor functionality including employee clock ins and execution of line clearance.

Capacity Planning

The following are the manufacturing foundations of Machine and Labor Capacity Planning that includes understanding the overlapping functionality of Shop calendars, BOMs, and Work Orders. In addition, learn how to set up available hours for Labor Capacity and the importance of changing start dates and time periods in the Machine and Labor Capacity Planning modules.

Material Staging

The following session provides a foundational overview for Material Staging for manufacturing processes in DELMIAWorks including how to access staging functionality, understanding the difference between each view, understanding speed button functionality for date range & update schedule and how to execute reports to gain more insight into material requirements.

ASSY Data

This foundational training session outlines the ASSY (Assembly) Data executable used for assembly manufacturing within DELMIAWorks. Users will learn how AssemblyData works with Assembly Track to provide information regarding scheduling & production, how the task clock and time clock interact with one another, how employees clock in and out while reporting production and rejected parts and other key ASSY Data functionality.

Production Reporting Options

The following training sessions provides a foundational outline covering Production Reporting Options within DELMIAWorks. Users will learn the different options for reporting production against work orders & the modules tied to each, gain understanding of differences between each option, view a demonstration of commonly used production reporting options and review production reporting items within the Transaction Log.

Final Assembly Reporting

This training lesson outlines Final Assembly Reporting for Assembly Manufacturing within DELMIAWorks. Users will learn how Final Assembly interacts with Assembly Track to provide production & reject information, be shown the differences between reporting in Final Assembly and process level reporting, how work orders & processes get updated after reporting and how Final Assembly functions effect on-hand inventory values.

Pick Tickets

This foundational training session provides an overview for Pick Tickets in DELMIAWorks. Users are shown how to access Pick Ticket records, how to create a Pick Ticket with items and locations to ship from, learn the difference between Sales Order & Inventory Availability modes, important options and converting Pick Tickets to a Packing Slip.

Bill of Lading (BOL)

The following training session provides an overview for Bill of Lading (BOL) functionality within DELMIAWorks. Users will learn how to configure master data required, gain an understanding of the various methods to generate BOL data, learn how packing slips display BOL data and how to associate multiple packing slips with a BOL record.

PO Approval

The following lesson provides foundational training about Purchase Order Approvals within DELMIAWorks. Topics covered include system configuration for PO approval processes, overview of the available approval methods, how the PO hierarchy affects workflow and provide a demonstration of Purchase Order Approval execution with workflow.

Rework Process in Assembly Track

The following session provides a foundational outline for the Finite Schedule with Assembly Processes. Topics include understanding the relationship between processes and BOM on qualified work centers, understanding how Finite Schedule and Assembly Track interact, understands how assembly processes can be added to the schedule and how Autoload can help schedule processes.

System Administration (Foundation)

IQAlert

This training session covers IQAlerts and reviews the multifunction purposes that enable the System Administrator and hands-free automated tool. Ideal for generating database backups, emailing reports, and evaluating various areas of the system.

IQEvent Log

This training session covers IQEvent Log and reviews the various error codes, access steps, how to view data available including date range filters, time stamps and brief error code descriptions.

IQStatus

This training session covers the purpose and function of IQStatus, as well as the relationship between IQStatus and the Oracle Client. Manage the local directories, executables that will be accessed, and concepts of Master and Local Homes.

IQTrace

This training session outlines IQTrace including configuration of tables and the effect on overall system performance, how to view traced data and the best fields to monitor within the system.

Security Inspector Groups

This training session introduces a part of Security Inspector called Groups. This course will review the convenience of managing security roles by groups. Use custom groups for custom roles as well as standard roles that are default in the system

Security Inspector Users

This training session introduces the primary function of Security Inspector called Users. This course will review how to create new users, assign roles, clone user roles, and assign unique password policies.

WMS/IQRF Setup Profiles

This training session covers User Profiles for WMS and IQRF systems including an overview of how to manage transaction permissions and types, how to print labels by configuring and granting access to shop floor users and a demonstration of basic options available for User Profiles.

Team Members

This training session covers the Team Members module including how it is utilized for DELMIAWorks record approvals in conjunction with workflow.

Templates / Workflows

This training course outlines Templates and Workflows to approve records within DELMIAWorks. Learn how to configure & execute workflow templates, review routing functionality & learn about parameters and how they affect approvals.

Troubleshooting 101

This training session covers troubleshooting of common software error messages and how to resolve them, configuring security access, how to manage user accounts, how and when to grant DBA access to a user, how to update PO Limits and how to manage database instances

Label Maintenance

This training session covers Label Maintenance functionality including label configuration, options and parameters including the difference between the different label types, an overview of the Label Hierarchy utilized within DELMIAWorks and a demonstrations of printing labels throughout the system.

Eplant Setup

This training session covers EPlant Setup with DELMIAWorks. Learn about how and why a company utilizes EPlants, differences between EPlants and Divisions and how to configure then implement EPlants in the system.

Quality (Foundation)

Team Members

This training session covers the Team Members module including how it is utilized for DELMIAWorks record approvals in conjunction with workflow. In addition, users will learn how to configure users, review how access & security are addressed, how and why a file path is configured and various options including Out of Office and delegations.

Templates / Workflows

This training course outlines Templates and Workflows to approve records within DELMIAWorks. Learn how to configure & execute workflow templates, review routing functionality & learn about parameters and how they affect approvals.

Doc Control

This training session introduces the purpose and function of Document Control. Understand the process of creating Libraries, Doc revisions, and the ability to link documents directly to any module within the system. In addition, learn the different features and functions that provide easy management tools for maintain secure and non-secure libraries.

MRB

This training session covers Material Review Board (MRB) functionality. Learn how to create an MRB, create a workflow approval template, associate an item, non-conform locations, customers or vendors to an MRB record, Repair Work Order & MFG Rework Order and Bill of Material functionality and how to approve an MRB with workflow.

CAR/CAPA

The following training module reviews Corrective Action Reports (CAR/CAPA) functionality including system wide modular interactions, how to create a new CAR/CAPA record, an overview of why and how to utilize and execute CAR/CAPA based on your business needs and a demonstration of configuration and execution of approval templates and workflow.

Deviation

This training session is an introduction to purpose and use of Deviations. Learn how to create and track Deviations for ECOs, or CARs. Leverage the Templates and Workflow functionality to maintain all electronic records.

ECO

This training session is an introduction to the Engineering Change Order (ECO) module. Learn how to set up ECOs using Workflow and Templates. Leverage this tool to manage and document change to product, process, or records, plus more.

Vendor RMA

The following video provides information on managing Inventory returns via the Vendor RMA module in the DELMIAWorks system. This lesson includes information on linking returns by PO Receipts, tracking returns, and return codes.

Customer RMA

The following video provides information on how to process and manage returns for Customer RMAs that provide a system to track inventory items, quantities, packing slip information and outcomes for Customer purchased products that request a return.

Cost of Quality

The following training session covers Cost of Quality functionality and includes module access steps; instructions configure and execute groups & queries along with a demonstration outlining module flow and functionality.

Control Plans

This training session reviews Control Plan functionality for DELMIAWorks. Review modular interactions throughout the system with Control Plans, how to execute and utilize Control Plans based on your business needs and available parameters.

Risk Assessment (FMEA)

This training course covers FMEA and FMEA Risk Assessment functionality including a detailed overview regarding the differences between FMEA & Risk Assessment and their functionality, FMEA Document features and a discussion of general best practices.

APQP / PPQ

This training course covers Advanced Product Quality Planning (APQP) in DELMIAWorks. Learn about how to utilize APQP based on your business needs, template configuration, how to minimize risks during product launch and executing an approval using workflow.

PPAP / PPQ

The following training course covers Production Part Approval Process (PPAP) functionality within DELMIAWorks with an overview of configuration & execution of templates and workflow for record approvals, a demonstration of PPAP and basic workflow and reviews available resources to ensure customer satisfaction.

Quality Projects

This training session covers Quality Project module functionality. Users are provided an overview of Quality Projects and how to utilize them within your group, how to create a new record including how to link FMEA, CAR, PPAP, APQP or Control Plans and an overview of module parameters and options.

Track and Trace

This training session is a foundational overview of the Track and Trace tool, learn how set up user security for Track and Trace, how to utilize order status query, and the Recall and Analysis feature.

Accounting (Foundation)

Tax Codes and Parameters

This training session reviews the areas of setup for Tax Codes, Tax Elements and how they are linked. In addition, the Terms tables is explored and how to create unique Terms.

Standard Costing

This training session reviews the steps for setup and use of the Standard Costing functionality in the DELMIAWorks system. In order to better understand how manufacturing impacts the costs to produce parts, this lesson will show us how to create Cost Elements, assign correct GL Accounts, assign to Inventory items, and evaluate the Recipe Card.

Process Costing

This training session introduces the Process Costing module as part of the financial suite of Costing methodologies. Process Costing provides a quick view of those cost contributions being introduced by cost elements and transactions.

Inventory Activity Cost Journal (IACJ)

This training session explains the purpose and functions of IACJ or Inventory Activity Cost Journal. Learn the requirements for Recipe Cards, the type of transactions that are supported, and posting those Journal entries.

Salesperson & Commissions

This training session explains the setup and processing of Salespersons, Groups, and the Commissions earned. Learn how the Commission Hierarchy is setup, and follow the Commission History.

Vendor 1099 Form

This training session explains the purpose and functions of the Vendor 1099 Form. Learn how to setup appropriate Vendors to enable tracking and generating forms.

AR Invoices

This training session outlines the features and functions of creating AR Invoices. As part of the financial suite of modules, AR Invoices are used in order to process payments received.

Cash Receipts

This training session outlines the features and functions of Cash Receipts. As part of the financial suite of modules, Cash Receipts is used to enter payments from AR Invoice activity.

AP Invoices

This training session outlines the features and functions of creating AP Invoices. As part of the financial suite of modules, AP Invoices are used in order to process payments.

Cash Disbursements

This training session outlines the features and functions of Cash Disbursements. As part of the financial suite of modules, Cash Disbursements are used to process payments for AP Invoice activity.

Cash Analysis

This training session explains the purpose and functions of the Cash Analysis module. Learn how to generate cash flow projections, the options and ability to chart or export this data for extended financial reporting.



Month End - Periodic

This training session provides instruction for the end of month closing procedures for the Periodic Inventory method including setting the GL Status for the current period, what reports to run to help determine account balances, end of month Financial Statements, closing the GL Status for the current period, in addition to opening the next period's GL Status. Also included is the Year End Closing Procedure.

Month End - Perpetual

This training session provides instruction for the end of month closing procedures for the Perpetual Inventory at Standard Costing method including setting the GL Status for the current period, what reports to run to help determine account balances, posting the inventory transactions, end of month Financial Statements, closing the GL Status for the current period, in addition to opening the next period's GL Status. Also included is the Year End Closing Procedure.

Fiscal Year Closing

This training session reviews the steps for Fiscal Year End Closing. As part of any financial process, closing year-end books is a critical aspect to getting year-end reports. This lesson will review those steps as well as those in preparation for future financial periods.

DELMIAWorks Advanced Certifications

After completing Foundation Training, users can access this library. If you have taken any Learning Path and need an exam, please email our team at delmiaworks.elearning@3ds.com.

Manufacturing I Adv.

Assembly / Complex Lines

This training session covers Assembly Complex Lines used with ASSY Manufacturing. Learn how and why complex lines are used, how to configure ASSY2 and ASSY3 complex lines and Bills of Material and review the differences for reporting ASSY2 and ASSY3 production in DELMIAWorks.

Visual BOM Routing

This training session covers Visual BOM Routing functionality and reviews the differences between visual and Text-based bills of material, outlines NEW and LIKE NEW functions and color codes, how to use to Cost/Quote speed button and how BOM details and work order routing functionality work together.

Daily Projected Reqs & Parts Projection

The following training session covers how to access and analyze the daily projected requirements for production needs as well as the planned production by part and estimated quantities for Inventory in the DELMIAWorks system.

Label Maintenance

This training session covers Label Maintenance functionality including label configuration, options and parameters including the difference between the different label types, an overview of the Label Hierarchy utilized within DELMIAWorks and a demonstration of printing labels throughout the system.

Lot # Tracking

The following video covers managing inventory with the Lot Number Tracking system in the DELMIAWorks and provides information on inventory movements with using Lot #s, managing Locations with different Lot #s, and Lot # tracking.

Serial # Tracking

The following video provides an overview of Serial # tracking functionality within the DELMIAWorks that is utilized to manage serial numbers as they are generated, scanned, and moved throughout the system for inventory items.

(ShopData) Plant Floor Layout

This training module covers Plant Floor Layout functionality in DELMIAWorks including configuration of a layout with an overview of the toolbox option and best practices.

(ShopData) Print Labels - RT / SO / Inventory

This training session outlines how ShopData Labels are configured & utilized within DELMIAWorks. Users are shown how to configure labels within ShopData, review the differences between the three labels types available, how to disposition RealTime labels and a demonstration of printing labels for each type in ShopData.



(ShopData) RT Scan / Floor Dispo / Pallet Builder

The following video introduces the different disposition transactions that can be conducted through ShopData of the DELMIAWorks system. This lesson includes information on RT Scan to Inventory, Floor Dispositions, and Pallet Builder.

ShopData WO Materials & Components

This training session provides information about ShopData Work Order Materials & Components functionality including an overview of how to find and analyze data, how to review color codes available, the differences between inventory quantities and how to identify pending transactions.

ShopData Locs & Trans

The following video introduces the different transactions that can be conducted through ShopData for specific inventory of the DELMIAWorks system. This lesson includes information on understanding the location status, moving inventory, and increasing or decreasing quantities within the ShopData application.

WMS/IQRF Transactions

The following video introduces the different transactions that can be conducted through Warehouse Management Systems for labeled inventory in the DELMIAWorks system. This lesson includes information on understanding the menu options, moving inventory along with shipping and receiving.

WMS/IQRF Setup Profiles

This training session covers User Profiles for WMS and IQRF systems including an overview of how to manage transaction permissions and types, how to print labels by configuring and granting access to shop floor users and a demonstration of basic options available for User Profiles.

Manufacturing II Adv.

RT Process Monitoring

This training session outlines the **RealTime Process Monitoring** application including configuration & execution steps.

RT Charts Setup

This training session outlines RealTime Process Monitoring - RT Charts Setup functionality including configuration of RealTime Charts, how to use the RealTime Charts Web Application and a detailed overview of add/remove capabilities.

RTPM Device Mapping Setup

This training session outlines the **RealTime Process Monitoring Device Mapping Setup** including configuration steps required, review the technote for important information, how to launch the server and how to log in to the device setup application.

RT Historian /Doc Repository

This training session details a **Secondary Database Install for DELMIAWorks** including how to create a new Oracle instance, installer data fields & settings and their purpose and how to utilize multiple instances for different requirements.

RT Station

This training session provides information about **RT Station**, which includes a discussion about the RT Station interface and a demonstration of the RT Applications.

Serialized Inventory Control

This training session introduces the function and features of **Serialized Inventory Control** and how the system controls and tracks each movement of inventory. By using the WMS/IQRF scanner functions, the system requires a barcode label enforcing strict parameters to ensure accurate tracking.

Supply Chain I Adv.

Label Maintenance

This training session covers **Label Maintenance** functionality including label configuration, options and parameters including the difference between the different label types, an overview of the Label Hierarchy utilized within DELMIAWorks and a demonstration of printing labels throughout the system.

Lot # Tracking

This training session provides detailed instruction for **Lot Number Tracking within DELMIAWorks** including an overview of how lot numbers are utilized within the system and a demonstration of basic navigation and executing transactions with lot number tracking.

Serial # Tracking

This training session provides detailed instruction for the Serial Number Tracking module and includes a detailed overview of the Serial Number Tracking Screen, how to reprint labels and how to avoid unnecessary labels.

(ShopData) Print Labels - RT / SO / Inv

This training session outlines how **ShopData Labels** are configured & utilized within DELMIAWorks. Users are shown how to configure labels within ShopData, review the differences between the three labels types available, how to disposition RealTime labels and a demonstration of printing labels for each type in ShopData.

Material Staging

The following session provides a foundational overview for Material Staging for manufacturing processes in DELMIAWorks including how to access staging functionality, understanding the difference between each view, understanding speed button functionality for date range & update schedule and how to execute reports to gain more insight into material requirements.

Work Order Hard Allocation

This training lesson covers **Work Order Hard Allocation** of materials with DELMIAWorks and covers the purpose of hard allocating materials, various fields utilized with this process, how to execute hard allocation of materials to a work order and how to remove hard allocated components from a work order.

WMS/IQRF Transactions

The following video introduces the different transactions that can be conducted through Warehouse Management Systems for labeled inventory in the DELMIAWorks system. This lesson includes information on understanding the menu options, moving inventory along with shipping and receiving.

WMS/IQRF Profiles

This training session covers **User Profiles for WMS and IQRF** systems including an overview of how to manage transaction permissions and types, how to print labels by configuring and granting access to shop floor users and a demonstration of basic options available for User Profiles.

Vendor RFQ

This training session reviews the **Vendor RFQ module** including how to create a new Vendor RFQ template and quote, a review of source information & important options and an overview of pricing breaks & quantities and how they are calculated within an RFQ.

Sales Quotations

This training session covers **Sales Quotation** functionality and execution including how to access the module to create new Sales Quotations, an overview of adding inventory items or RFQ items to the quote, how basic options within the module can be utilized and the process of converting a sales quotation to a sales order.

Customer VMI

This training session provides details regarding Customer VMI (Vendor Managed **Inventory**) including the required setup for VMI, how sales orders, packing slips & AR Invoices are connected to the VMI Location, and how to process VMI consumption, and the difference between voids and returns.

Vendor VMI

This training course covers **Vendor Managed Inventory (VMI)** processes & configuration for inventory, locations and vendors while including tips on how to identify critical processes and a demonstration of to execute a VMI transaction, gradually.

Intercompany Transfers (ICT)

This training session **covers Intercompany Transfers (ICT's)** functionality including an overview of inventory that can be transferred, how to configure items, locations and options, review Kanban triggers and where they are utilized and a demonstration of how to execute an Intercompany Transfer within DELMIAWorks.

Outsource Processes

The following training session covers **Outsource Processes** within DELMIAWorks. Topics include a review of the four system setup steps, learning the difference between PO Based and Work Order based outsourcing, a demonstration of PO and Work Order based outsource methods, how to handle outsource orders and shipments and an overview of how these transactions affect inventory transactions.

Forecast Generation

This training session covers **Forecast Generation** within DELMIAWorks. Users will learn about Production and Sales Forecasts, how Production Forecasts generate work orders, what modules affect the Forecast module and are provided a demonstration of exploding forecasts and importing/exporting forecasts.

Forecast Basics

This training session covers the basics for the **Forecast** module for DELMIAWorks. Users will review each forecast type and the information it provides, how to filter data, how to configure and execute forecast groups, review speed button and right-click options and be provided a demonstration of creating a forecast with various methods.

Shipping Manager

This training session covers the **Shipping Manager** module & functionality covering mandatory configuration steps, various ways to configure the module, the differences between international and domestic shipments and how to perform End of Day (EOD) processes successfully.

BOL Signature Capture

This training session covers the **Bill of Lading (BOL) Signature Capture** feature within DELMIAWorks for shipments including execution and configuration of the feature including for Android Tablets, review how signatures are captured stored to be utilized within reports

Maintenance Adv.

Work Centers

This training session provides information on **Work Centers within DELMIAWorks**. Users will learn the difference between center types, how to configure a Center Cost, how to assign a RealTime address for production, how to configure MRO work center settings and how Capacity Planning and the Shop Calendar affect work center functionality.

MRO Equipment Setup

This training session covers how to configure equipment to be tracked and utilized in the MRO module and provides a demonstration of equipment setup within DELMIAWorks including all required steps.

MRO Equipment Tasks

This training session outlines Equipment Tasks for the MRO (Maintenance, Repair, and Overhaul) module including basic functionality/options, creating task templates to utilize in the system, and total units for task & equipment status and fields that affect work order functions.

MRO Work Order Basics

This training session covers basics of MRO Work Order functionality including an overview of Task and Work Order interactions, features of MRO Work Orders; available menu options/speed buttons, and accessing essential reports.

MRO Work Order Processing

This training session covers processing Maintenance, Repair and Overhaul (MRO) Work Orders. Users will learn how to generate MRO work orders, how different options affect work order creation, how to access & utilize the work order planner and a demonstration of processing a MRO work order from closing a task to archiving the work order.

Plant Floor Layout

This training module covers Plant Floor Layout functionality in DELMIAWorks including configuration of a layout with an overview of the toolbox option and best practices.

PO Approval

The following lesson provides foundational training about Purchase Order Approvals within DELMIAWorks. Topics covered include system configuration for PO approval processes, overview of the available approval methods, how the PO hierarchy affects workflow and provide a demonstration of Purchase Order Approval execution with workflow.

Inventory Transactions and Locations

The following session provides a foundational overview for the Inventory Locations & Transactions module. Users will be introduced to module access & navigation basics, available location types and status flags, how disposition designators are configured and assigned throughout the system, when to use Lot#'s and how to read the Transaction Log



System Administration Adv.

Data Load Tools

This training session covers **Data Load Tools** available to DELMIAWorks users including an overview of data load types, what to consider when choosing a tool, how to define normalized data and a demonstration of troubleshooting within the tool.

Import External File Utility

This training session outlines how to utilize the **Import External File Utility Tool with DELMIAWorks** including how to view External Source Formats, how to configure an import Schema and an overview of how to identify different import tables and fields.

Label Designer & Hierarchy

This training session provides detailed instructions on how to create a label using the **Label Designer** utility within DELMIAWorks and the hierarchy used to determine which label to print and when.

SSS Query Designer

This training session outlines the **Query Designer add-on Tool for Spreadsheet Server** including how to build queries with Query Designer, navigation within the visual tool, how to utilize import/export pre-configured queries, an overview of parameters and a demonstration of executing dynamic calculations.

RT Process Monitoring Setup

This training session provides detailed instruction for **RealTime Process Monitoring** including RT Charts, Capabilities, Alarms, Historic Charts, SPC Charts, Machine Setup, Monitor including scheduling a work order and RT Charts Security.

RT Device Mapping Setup

This training session outlines the **RealTime Process Monitoring Device Mapping Setup** including configuration steps required, review the technote for important information, how to launch the server and how to log in to the device setup application.

RT Hist / Doc Repos / 2nd Instance

This training session details a **Secondary Database Install for DELMIAWorks** including how to create a new Oracle instance, installer data fields & settings and their purpose and how to utilize multiple instances for different requirements.

WebAPI SDK

This training session outlines the Web API SDK utility available with DELMIAWorks including common tool requirements, sample applications, and programming languages used for the creation of Web API's.

Application Manager & IIS

This training session outlines the Application Manager executable for DELMIAWorks including installation requirements and server setup instructions.



User Migration

This training session provides information on the User Migration Tool available with DELMIAWorks including a review of different methods available that will best facilitate the transfer of Oracle users and a demonstration of how to execute this migration.

IQArchiver

This training session reviews the IQArchiver utility available with DELMIAWorks and covers benefits, best practices, system wide module interactions and a demonstration of the utility in use.

IQPurge

This training session covers IQPurge including how and when to utilize the utility, the difference between archived and purged data, how to identify tables to be purged and how to utilize SQL statements during a data purge.

IQExtension

This training session covers IQExtension functionality including types of extensions, configuring extension types and an overview of the extension script including configuration.

Finance Adv.

Multi-Currency

This training session introduces the process and functions of Multi-Currency. International transactions are tracked and provide financial information needed to evaluate exchange rates between currencies setup in the DELMIAWorks system.

Currency Translation

This training session introduces the process translating any trial balance account in a different foreign currency. Currency Translation is a viewing tool and part of the Foreign Currency tools found the DELMIAWorks system.

Account Revaluation

This training session introduces the concepts of Account Revaluation. The purpose of Account Revaluation provides the ability to update Balance Sheet accounts held in non-native currencies in order to show changes in exchange rates between native and foreign currencies.

Import External File Utility Tool

This training session outlines how to utilize the Import External File Utility Tool with DELMIAWorks including how to view External Source Formats, how to configure an import Schema and an overview of how to identify different import tables and fields.

Cost Source

This training session outlines the purpose of Using Cost Source within DELMIAWorks. This tool allows the user to link various activities or cost sources found in modules like Project Manager, JobShop, and Quotes to the financial activities that provide a value-add to these areas of the system.

Budgets

Let us explore how Budgets are just the beginning of better Financial Oversight. DELMIAWorks supports budgets for every GL Account, as well as multiple budgets for each year. DELMIAWorks then continuously displays the current year (by period) in several financial activities that have budgets configured for those respective GL Accounts.

Query Designer

This training session outlines how to utilize the Query Designer with DELMIAWorks. This tool allows the user to build queries against data in the table to present in an Excel spreadsheet. This allows for a seamless data retrieval tool providing drill-down for multi-level reporting needs.

EPlant Setup

This training session covers EPlant Setup with DELMIAWorks. Learn about how and why a company utilizes EPlants, differences between EPlants and Divisions and how to configure then implement EPlants in the system

Avelera Tax Tool

Explore the setup areas that are required as part of using the Avalara Tax Web Service. This session includes Customer usage, requirements for setting up inventory tax class codes, and where in the system tax calculations occur.

Fixed Assets

This training session provides detailed instruction for the **Fixed Assets** module including 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 how to remove an unposted depreciation.



Production Engineer Adv.

Engineering Quote

The Engineering Quote module is a powerful tool used to fine tune-estimated costs and profit margins. The quote structure is similar to creating a Bill of Manufacture (BOM), but allows the user to run unlimited “what if” scenarios without

This session will take the user from Quote to BOM conversion and back again.

PLM / DHR

This training session covers the Product Life Management or Device History Record (PLM/DHR) tools that are employed at every concept of design, through various engineering changes, pre-production, post-production, and conclusion of every part or product within the DELMIAWorks system. Leverage all that the PLM/DHR modules have to offer.

Project Manager Processes & Tasks

DELMIAWorks Project Manager module provides a robust set of tools to manage all types of projects. This session covers the processing of tasks, work orders, and tracking time and costs for each project.

Project Manager Setup & Use

DELMIAWorks Project Manager module provides a robust set of tools to manage all types of projects. This session covers the setup portion in preparation of using this module. Explore necessary parameters, optional parameters, and common resources. Project Manager leverages Templates and Workflows for added productivity as well.

JobShop

This training session provides an introduction to the JobShop module including configuration requirements, creating projects, item production and archiving projects.

QMS I Adv.

Quick Inspection

This training session is an introduction to the Quick Inspection module. As part of the Quality suite of modules, learn how the setup portion of Inspection setup is critical to using the Quick Inspection area of the system. Once parameters, groups, and devices have been entered and the record approved the user is now ready to enter data collected.

Inspection Approval Process

This training session provides an overview of the Inspection Approval process. As part of the Inspection setup, and Quick Inspection, Inspection Approval is required prior to data entry.

In-Process Inspection Log

This training session is an introduction to **In-Process Inspection Log** module. As part of the Quality suite of modules, learn how this tool can be leveraged for data collection purposes. Unlike Quick Inspection, no data is transferred into the SPC modules but still can be exported.

SPC Inspection Setup

This training session is an introduction to **Inspection Setup** for **Statistical Process Control** module or SPC. As part of the Quality suite of modules, learn how to setup parameters and inspection groups as well as associating them to gauges or devices that may be used to collect that data.

SPC Past Inspections

This training session is an introduction to reviewing **Past Inspections** conducted by Quick Inspections. Past Inspections can be viewed leveraging SPC functionality. As part of the Quality suite of modules, SPC Past Inspections contributes to the overall trending data.

RT Process Monitoring

This training session outlines the **RealTime Process Monitoring** application including configuration & execution steps.

RT Charts Setup

This training session outlines **RealTime Process Monitoring - RT Charts Setup functionality** including configuration of RealTime Charts, how to use the RealTime Charts Web Application and a detailed overview of add/remove capabilities.

RT Historian /Doc Repository

This training session covers the purpose and function of the **RT Historian or Doc Repository** with the DELMIAWorks system. Whether you are creating a second instance for RT Process Monitoring Historian data or for a Doc Repository for Doc Control, this feature can be used for both.

Quality Audit

This training session is an introduction to **Quality Audits** module. As part of the Quality suite of modules, learn how to set up Templates and Workflows, schedule your Audits by leveraging IQAlerts, CRMs, and involve your team for both Internal and External Audits.

Human Resources Adv.

T & A Setup

This training session introduces the purpose and function of Time & Attendance.

Understand the setup requirements for use of this module in tracking labor hours for both Payroll and Labor Cost tracking. In addition, learn the different features and functions that provide easy management tools for Security, Supervisor roles, and HR roles.

T & A Tasking In & Out

Time & Attendance provides the ability to assign and track labor against tasks and jobs in addition to time shifts and shift reporting. This presentation assumes the primary default parameters, shifts, and employees have been set up. This training session instructs the user how to task in and out of jobs, work centers, tasks, or other assignments. In addition, learn the different screens, messages, and production reporting options found within the Task Clock in and out screen.

Document Control

This training session introduces the purpose and function of **Document Control**.

Understand the process of creating Libraries, Doc revisions, and the ability to link documents directly to any module within the system. In addition, learn the different features and functions that provide easy management tools for maintain secure and non-secure libraries.

DELMIAWorks Software Updates

This library provides information regarding updates to functionality for new DELMIAWorks software versions. When a new release becomes available, a corresponding module will be available here.

What's New DW2020 – Accounting

- | | | |
|-------------------------------------|------------------------|------------------|
| 1. AR Invoice - Rebilling | 4. Customer Price Book | Allow Supervisor |
| 2. Cash Receipt Reversal | 5. Currency – Value | Override |
| 3. Credit Cards – On Account Option | Separators | |
| | 6. Time & Attendance – | |

What's New DELMIAWORKS 2020 - Highlights

During this recorded webinar, users will be shown new functionality available in version DELMIAWORKS 2020 of the software.

What's New DELMIAWorks 2020 Overview

During this recorded webinar, users are shown an overview of new functionality and features for DELMIAWORKS 2020.

What's New DW2020 – Non-Accounting

- | | |
|--|---|
| 1. Bill of Material – Teardown Value | Parameters |
| 2. Customer Maintenance – AKA Inventory | 11. Right to Erasure Tool – RTE Tool |
| 3. Group Codes – Pick Lists | 12. Sales Orders/Packing Slips – Pallet Charge |
| 4. Production Reporting – Disposition Parameters | 13. Ship Via – Local Address |
| 5. MRO Work Order – Email Option | 14. Shipping Manager – FedEx Multi Piece Tracking #'s |
| 6. Purchase Orders – Toggle Closed Items | 15. Shipping Manager – Shipping Batteries |
| 7. Purchase Order Receipts – Parameters | 16. Work Centers – Fixed Machine Rate |
| 8. Quick Inspections – Require Inspection | |
| 9. RealTime Process Monitoring – Device & MFG# Setup | |
| 10. RFQ – New Calculations and | |

What's New DELMIAWORKS 2020 - IACJ (Inventory Activity Cost Journal)

During this recorded webinar, users will be shown how to utilize features and functionality now available in the IACJ (Inventory Activity Cost Journal) module for version DELMIAWORKS 2020 including how to create journal entries, how to filter transaction types and posting journal entries.



What's New DW2020x – Non-Accounting

1. Advanced WMS – Directed Task Features
2. Advanced WMS – Drop Zones
3. Advanced WMS – Transaction Rule Comment Field
4. Bills of Material – Authorized Work Centers
5. BOL – Bill of Lading Functionality
6. Inventory – Add to Location Reason
7. Inventory – Remove from Location Reason
8. Inventory by Location – Last In Date
9. IQRF – On Hold/Ship Hold Alert
10. Packing Slips – Tracking Number
11. Purchase Orders – Sequential Workflow
12. RFQ – Engineering Quote Types
13. RFQ – Workflow Parameters
14. RFQ – Workflow Options
15. RT Station – Inventory Group Code
16. ShopData – Pallet Builder
17. SHOPWORKS
18. System – Employee Level Access
19. WebIQ – Document Control
20. WebIQ – Print Service/Print Resource Manager
21. WebIQ – Security
22. WMSIQ – On Hold/Ship Hold Alert

What's New DW2020x – Accounting

1. Account Revaluation Options
2. Currency Translation Module
3. IACJ – Inventory Activity Cost Journal
4. WebIQ – Multi Currency Maintenance

What's New DELMIAWORKS 2020x Overview

During this recorded webinar, users are shown an overview of new functionality and features for DELMIAWORKS 2020x.

What's New DW2021 – Accounting

1. Pallet Charge- AR Invoicing
2. 1099 Apply Dollar Threshold Form
3. Define Organizational Structure
4. Financial Consolidations
5. Enhanced GL Calendars
6. PO Receiving With Exchange Rate Variance (ERV)
7. Price Book Enhancement

What's New DW2021 – Non-Accounting

1. IQRF- Pallet Count Prompt
2. IQRF- Inspection Required Prompt
3. WMS- Pallet Count Required Prompt
4. WMS- Inspection Required Prompt
5. Auto-MRP Scope in Days
6. Engineering Quote Enhancements
7. Group Codes – Various Areas
8. MRO Out-of-Service Reason
9. Sequential Numbering for Inventory Items in BOMs and Quotes



10. Inspection Setup
11. Inspection Setup
12. RTStation - New Reason Field
13. Inventory Availability
14. Pick Ticket
15. SHOPWORKS Update Overview
16. Customer Maintenance
17. IIS Gateway

18. Oracle 9c Client Installer Enhancements
19. Inventory Transactions Rules
20. WebAPI - Packing Slip Creation
21. Document Control Tags
22. System Parameters
23. WebIQ Security - Role Based

What's New DW2021x

1. What's New Document DW 2020x PDF
2. Know Before You Go PDF
3. CRM – Sales Configuration Template
4. SHOPWORKS Language Settings
5. WEB API Packing Slip Enhancements
6. WebIQ Role Enhancements
7. RealTime Charts Enhancements

8. Inventory Cost Revalue Account for Purchased Items
9. Affordable Care Act Form Enhancements and Changes
10. SHOPWORKS: Licensing Requirements
11. Security Role Enhancements
12. Licensing Enhancements
13. Currency Rate Types
14. Avalara Tax Rates

Learning Experience for DELMIAWorks Library

This library provides access to all modules available within Foundation Training Learning Paths and several shorter training videos that cover basic functionality. Module descriptions are available above.



Filename: NEW NEW Learning Experience for DELMIAWorks Portfolio Catalog
2023.docx
Directory: C:\Users\ath3\Learning\MARKETING and BRANDING\LearnExp -
LIBRARY CATALOG
Template: C:\Users\ath3\AppData\Roaming\Microsoft\Templates\Normal.dotm
Title: Learning Experience for DELMIAWorks Catalog 2021
Subject:
Author: Allison Tish
Keywords:
Comments:
Creation Date: 1/24/2023 11:56:00 AM
Change Number: 60
Last Saved On: 10/16/2023 10:38:00 AM
Last Saved By: TISH Alli
Total Editing Time: 195 Minutes
Last Printed On: 10/16/2023 10:38:00 AM
As of Last Complete Printing
Number of Pages: 42
Number of Words: 11,526 (approx.)
Number of Characters: 65,702 (approx.)