Learning Experience for DELMIA WORKS

Portfolio Catalog

2022

Learning Experience for DELMIAWorks

Technical Modules

Update Content

Technical Summary Modules

Webinars

Role Based Learning

General Role Categories

Accounting & Finance	Production Control & Management
Human Resources (HR) Management	Quality Assurance & Control
Inventory Control & Management	Sales & Customer Service
Maintenance Repairs & Management	Shipping & Returns
MRP - Material Resource Planning	System Admin & IT

Role Track Modules

Licensed Learning Paths

By Module Learning

Assembly Data & Track

Inventory, Transactions & Locations

RealTime Production & Process Monitoring

Document Control

Purchase Orders

Customer Maintenance & Relationship Management (CRM)

Finite Scheduling

Quick Inspection

Work Orders & Work Centers

MRO (Maintenance Repair Overhaul)

WMS & Advanced WMS

Labels in DELMIAWorks

BOM (Bills of Material)

Sales Orders

Team Members

ShopData & JobShop

Production Reporting

By Skill Level Learning

Introductory Learning

Fundamental Learning

Advanced Learning

Advanced Certifications by Role

By MFG Type Learning

Generic, Injection & Stamping

Assembly (ASSY)

Advanced Certifications by Role

Overviews

Software

Packing Slips	Advanced WMS	AssyData
Pick Tickets	Assembly Track	What's New 2020x

Roles

Advanced Learning

WebIQ

Library Key & Navigation

Please see our New User Guide for additional library and navigation information.

Learning Experience for DELMIAWorks Library

Technical Modules

Basic Navigation

In this module, you will learn how to log into DELMIAWorks, 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 DELMIAWORKS for assistance.

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

6.

3DExperience Edu Space – Full User Guide

This training session provides detailed instructions regarding the 3DExperience Edu Space eLearning platform available for DELMIAWorks customers and clients.

1. Log In, View User Agreement, Update User Password
2. Access DELMIAWorks Library & Favorites
3. Access and Navigate Assignments
4. Access Help and Support
5. Admin Functionality

Smart Page

In this module, 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 DELMIAWORKS modules.

1. Create a Smart Page Dashboard
2. Add DELMIAWORKS 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 DELMIAWORKS Modules
9. **Clone a Smart Page**

Crystal Reports Basics with DELMIAWORKS

In this module, you will learn the basics of using Crystal Reports with DELMIAWORKS 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

Inventory – Create a New Item

In this module, you will learn how to identify the 6 standard inventory classes, creating a new item, understanding required fields for inventory items, utilizing tabs available and cloning an inventory item

1. Identify the Six Standard Inventory Classes
2. Create a New Item
3. Understand Required Inventory Fields
4. Understand Inventory Quantities
5. Utilize Inventory Sub-Tabs
6. Utilize Main Inventory Tabs
7. Clone an Inventory Item

Inventory - Pricing Hierarchy

In this module, you will have instruction for the pricing hierarchy utilized by DELMIAWORKS including how to configure the different pricing types and accessing options available.

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

Inventory - AKA Buying Tab

In this module, you will learn how to access AKA Buying Price Breaks, creating AKA Buying Price Breaks, and available options on the AKA Buying Tab.

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

Inventory - AKA Selling Tab

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

1. AKA Selling Information
2. Locate Material in Master Inventory
3. AKA Selling
4. Create New AKA Selling Items
5. Edit AKA Fields
6. Affect Quantity and Price Information
7. Retire AKA Selling Information
8. Buy/Sell Pricing

Inventory - Transactions and Locations

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

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

Inventory - Classes

In this module, you will learn about Inventory Classes available in DELMIAWORKS including configuration of inventory classes, an overview of the 6 standard inventory classes and options available.

1. Access the Master Inventory Class List
2. Identify the 6 Standard Inventory Classes
3. Create a new Inventory Class
4. Utilize Inventory Class Options

Physical Inventory in DELMIAWORKS

In this module, you will learn how to perform a physical inventory count in DELMIAWORKS using the two methods available, Full Physical and by Worksheet.

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

Bills of Material - Configuration

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

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

Serial Number Tracking

In this module, you will learn detailed instructions for the Serial Tracking Module including a detailed overview of the Serial Number Tracking Screen, how to reprint labels and void labels.

1. Understand the Serial Number Tracking Screen.
2. Utilize the Reprint and Void functions

Bills of Material – ASSY Configuration

In this module, you will learn the differences between the 3 types of ASSY manufacturing, how to create a new ASSY bill of material and the fields and tabs available, creating and adding processes to ASSY BOM's, creating an assembly line and how to access and utilize the Process Dependency Chart and Throughput Map.

1. Identify Types of Assembly (ASSY) MFG
2. Create a new ASSY   or 2 Bill of Material
3. Identify & Utilize ASSY   & 2 BOM Fields
4. Create an ASSY   Work Center
5. Create a new Process/Operation
6. Utilize Fields and Tabs for Processes
7. Create an ASSY3 Bill of Material
8. Create an Assembly Complex Line
9. Access and Edit the Process Dependencies Chart
10. Access and Launch the Throughput Map

Label Hierarchy and Label Designer

In this module, you will learn how to create a label using the Label Designer within DELMIAWORKS and the hierarchy DELMIAWORKS uses to determine which label to print.

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

Lot Number Tracking

In this module, you will learn how to configure lot tracking and how to utilize the Lot Number Tracking Module.

1. Understanding How Lot Numbers Are Assigned
2. Setting Up How to Require Lot Numbers
3. Navigating the Lot# Tracking Module

Shop Calendar - Standard Labor Capacity

In this module, this training session provides an overview of the standard labor capacity tool located within the shop calendar module.

1. Access and Utilize the Standard Labor Capacity Tool
2. Navigate the Standard Labor Capacity Tool
3. Locate Standard Labor Hours in the Finite Scheduling Module

Shop Calendar – Configure

In this module, you will learn how to configure the Shop Calendar in DELMIAWORKS including how to schedule holidays, days off and shifts.

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

WMSIQ

In this module, you will learn how he basic functionality of WMSIQ, known as Warehouse Management System for DELMIAWORKS 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.

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

IQRF

In this module, you will learn how the basic functionality of the IQRF System for DELMIAWORKS 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.

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

Finite Scheduling

In this module, you will learn how to access the module, understand scheduled job details, schedule a work order, utilize Auto Load to schedule work orders, edit and move work orders.

1. Access the Finite Scheduling Module
2. Understand Schedule Job Details
3. Schedule a Work Order & Add Downtime
4. Schedule Work Orders with Auto Load
5. Edit or Move Work Orders

Work Centers – Enable Backflush

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

1. Configure a Work Center's Backflush Settings

Work Centers - Create

In this module, you will learn how to access the work center module, how to create a work center, setting MRO Exclusions for a work center, utilizing the Reject & Downtime Code tabs an assigning Cost Elements to a work center.

2. Create a Work Center
3. Set MRO Exclusions for a Work Center
4. Utilize the Reject & Downtime Code tabs
5. Assign Cost Elements to a Work Center

Work Orders - Create

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

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

Assembly Track

In this module, 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.

9. Identify Three Assembly Manufacturing Types
10. Create an Assembly Process
11. Add an Assembly Process to a BOM
12. Add a Work Order to Assembly Track
13. Finite Schedule Process Work Orders
14. Report Labor, Rejects and Backflush Components
15. Report Good Parts and Close the Work Order

RealTime Setup and Monitoring

In this module 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.

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

RealTime Process Monitoring

In this module, 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.

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

Production Reporting

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

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

ShopData

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

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

JobShop

In this module, you will learn about the JobShop module including configuration requirements, creating projects, item production and archiving projects.

1. Configure JobShop
2. Understand the General Tab of the Project
3. Create a Project
4. Understand the Detail Tab of the Project
5. Archive a Project

AssemblyData

In this module, you will learn about the task required for the configuration and operation of the AssemblyData (AssyData) executable. This includes how to clock in and out of tasks, report line clearance and report Final Assembly. As well as how to utilize Pallet Builder, Serial Number Tracking, MRO Work Orders and Quick inspection.

1. Understand the Foundation of Assembly Data
2. Understand AssyData Menu Options
3. Configure the AssyData Screen
4. Configure Employee Maintenance
5. Configure Assembly Processes for Line Clearance
6. Configure Work Order Setup
7. Task in and Out of Work Order Tasks
8. Report Line Clearance
9. Utilize Pallet Builder and Serial Number Tracking
10. Utilize the MRO Work Order Option
11. Utilize the Quick Inspection Option
12. Report Final Assembly

Outsourcing in DELMIAWORKS

In this module, you will learn about the outsourcing processes available within DELMIAWORKS including Outsource Central and two manual outsource processes.

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

Project Manager

In this module, you will learn about the Project Manager module in DELMIAWORKS including accessing options and parameters, creating and assigning Project Types, overview of the Tasks tab including creating and assigning Tasks to the Project, assigning an RFQ to the Project, generating planned and actual dates for Tasks, utilizing predecessors, assigning cost elements to Tasks, assigning labor and employees to Tasks, converting the Project to a work order, assigning production work orders to the Project, calculating Project price and printing the Quote Letter.

1. Access Options & Parameters
2. Create a New Project
3. Create and Assign Project Types
4. Link an Existing RFQ to the Project
5. Create Tasks and Subtasks
6. Create and Apply Task Templates
7. Generate Planned and Actual Dates for a Task
8. Assign an Employee to a Task
9. Add a Default Predecessor
10. Assign a Cost Element to a Task
11. Apply Actual Labor
12. Assign Labor to a Project Task
13. Convert to a Work Order
14. Assign Production Work Orders
15. Calculate Project Price & Print Quote Letter

Purchase Order- Email

In this module, you will learn how to manually email a PO, configuring a contact for Auto EForms, enabling the Auto Email option when printing a PO, and creating an IQAlert Action for Auto EForms PO.

1. Manually Email a Purchase Order
2. Configure a Contact for Auto EForms PO
3. Enable Auto Email in the Print PO Dialog Box
4. Create a PO Auto EForms IQAlert Action

Purchase Orders – Create and Receive

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

1. Access the Purchase Order Module
2. Understand the Purchase Order Screen
3. Create a Purchase Order and Releases
4. Receive against a Purchase Order
5. Post Rejects against a Purchase Order

Purchase Orders – Color Chips

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

1. Access & Identify PO Color Chips

Purchase Orders - Clone

In this module, you will learn how to clone an existing purchase order to create a new purchase order.

1. Clone a Purchase Order

Purchase Orders – Approve w/ Workflow

In this module, you will learn how to create a PO workflow template, create and delete Team Members, and approving a PO with a workflow template.

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

Vendor RMA

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

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

Sales Orders - Create

In this module, you will learn how to create a sales order, how to add information to each area, associating items to the order and how to utilize other available options.

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

Sales Orders – Generate Releases

In this module, you will learn how to generate Sales Order releases including the 4 ways to generate a release and how to utilize available options for releases.

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

Capable to Promise

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

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

Customer RMA

In this module, 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.

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

Auto EForms in DELMIAWORKS

In this module, you will learn how about various options available and how to access and configure the various types of Auto EForms available in the system.

1. Access Auto EForms
2. Utilize Auto EForms for AR Invoices
3. Utilize Auto EForms for Order Acknowledgements
4. Utilize Auto EForms for Packing Slips
5. Utilize Auto EForms for Bill of Lading
6. Understand Auto EForms Options
7. Print Auto EForms Reports

Sales Quotations

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

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

Pick Ticket Overview

In this module, you will learn how to access the Pick Ticket module, how to create a pick ticket from the module and a sales order and how to convert a pick ticket to a packing slip.

1. Access the Pick Ticket Module & Parameters
2. Create a Pick Ticket from the Module
3. Create a Pick Ticket from a Sales Order

Packing Slip Overview

In this module, you will learn how to access the Packing Slip Module, overview of screen fields, creating a packing slip from the module, creating a packing slip from a Sales Order, calculating and printing Certificate of Conformance against a packing slip, printing and voiding a packing slip.

1. Access the Packing Slip Module
2. Understand the Packing Slip Screen
3. Create a Packing Slip – Module
4. Create a Packing Slip – Sales Order
5. Calculate Certificate of Conformance (CoC)
6. Print a Packing Slip
7. Void a Packing Slip

Bill of Lading (BOL)

In this module, you will learn about bill of lading including how to create NMFC codes, assign bill of lading data to inventory items, available bill of lading calculation options, how to utilize the BOL module and BOL tab via packing slips.

1. Create NMFC Codes
2. Assign NMFC Codes to Inventory Items
3. Assign Bill of Lading Data to Items
4. Set the Bill of Lading Calculation Method
5. Utilize the Bill of Lading Module
6. Utilize the Bill of Lading Tab via Packing Slips

Ship Via Maintenance

In this module, 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.

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

Carrier Maintenance

In this module, you will learn about the Carrier Maintenance module to process shipments via Shipping Manager in DELMIAWORKS including setup for label and report printers, setup for available carriers (UPS, FedEx and USPS), and basic options available.

1. Access Carrier Maintenance
2. Add a Label Printer for Carrier Setup
3. Add a Freight Scale for Carrier Setup
4. Access and Utilize Shipping Settings
5. Utilize Screen Options for Carriers
6. Setup for UPS
7. Setup for FedEx
8. Setup for USPS

Daily Material Staging Requirements

In this module, you will learn how to access and how to run several Material Staging reports.

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

Daily Parts Projection

In this module, you will learn detailed definitions for the Daily Parts Projection screen including how to access the screen and use the filters.

1. Locate the Daily Parts Projection Screen
2. Understand the Daily Parts Projection Screen

Forecast

In this module, you will learn about the Forecast module in DELMIAWORKS including the two types of forecasts available, Forecast screen options, creating a forecast, creating a forecast group and linking inventory items, Forecast parameters, generating Forecast data, setting up formulas, generating Forecast data with formulas, manually entering Forecast data and exporting Forecast data to Excel.

1. Understand Production versus a Sales Forecasts
2. Understand Forecast Screen Options
3. Access Forecast Parameters
4. Create a Forecast
5. Create a Forecast Group
6. Assign Items to a Forecast Groups
7. Generate Forecast Data
8. Generate Forecast Data w/ Formulas
9. Manually Enter Forecast Data
10. Export a Forecast to Excel

Material Exception List

In this module, 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 versus Existing tabs.

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

Rough Cut Capacity and Daily Projected Requirements

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

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

Whiteboard Capacity and Labor Whiteboard Capacity Planning

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

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

Maintenance, Repair and Overhaul (MRO)

In this module, 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.

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

Troubleshooting 101

In this module, you will learn common user access and software error message resolution including access violations, security access, unlocking user accounts, granting DBA access to a user, updating PO Limits for users and starting or restarting database instances.

1. Address Access Violations
2. Grant Security Access – Security Roles
3. Unlock a User Account
4. Grant DBA Access to a User
5. View License Counts
6. Update User PO Limits
7. Start or Restart Database Instances

System Parameters – List of Lists

In this module, you will learn about to access and utilize the various options available on the List of Lists.

1. Access the List of Lists in System Parameters
2. Create Cost Elements
3. Create Divisions and Warehouses
4. Create Downtime Codes
5. Manage Employee Levels
6. Utilize the Employee List
7. Access & Utilize Inventory Classes
8. Access and Manage Inventory Locations
9. Access and Manage Inventory Transaction Codes
10. Access and Manage Inventory UOM's
11. Manage Labor Codes
12. Manage Manufacturing Cells
13. Manage Manufacturing Types
14. Utilize Non-Allocate Codes
15. Utilize Non-Conform Codes
16. Access and Manage PO Misc. Items
17. Create PO Types
18. Access and Manage Reject Codes
19. Maintain Commissions for Salespeople
20. Create a Ship Via
21. Access and Manage Tax Codes
22. Configure Terms

Security Inspector – System Deny Role

In this module, you will learn what a deny role does, how to access Security Inspector, how to create a system wide deny role, how to assign a deny role to a user and how to confirm the deny role is functional.

1. Understand What a Deny Role Does
2. Access Security Inspector
3. Create a System Wide Deny Role
4. Assign a Deny Role to a User
5. Confirm a Deny Role is Functional

Security Inspector – Create New Users

In this module, you will learn how to create a new user, how to configure a security profile for a new user and how to configure passwords.

1. Create a New User
2. Utilize Profile Options for a User
3. Create a Security Profile
4. Utilize the Option "Force Password Change"
5. Utilize the Password Policy Tab

Security Inspector – Lower Tabs

In this module, you will learn about the Security Inspector module in DELMIAWORKS for the lower user tabs. This includes setting up the auto shut off limit, PO limits and access limits.

1. Utilize the General Tab
2. Utilize the CRM Tab
3. Utilize the PO Limit Tab
4. Utilize the RMA/Inv Limit and Excluded Inv Trans Tabs.
5. Utilize the Customer and Vendor Access Tabs
6. Utilize the Accessible EPlants Tabs
7. Utilize the My Alerts
8. Utilize the INV UD Class Access

IQAlert - Groups

In this module, you will learn how to create groups in IQ Alerts. You will also learn how to assign alerts to a specific group.

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

IQAlert - Actions

In this module, 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.

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

CAR – Corrective Action Report

In this module, you will learn how to access the module, how to create a new CAR, how to associate items to the CAR, how to add an image to the CAR, how to utilize the Documents tab on the CAR, how to create Team Members and approving a CAR with workflow.

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

Document Library 1 – Creating a Document Library

In this module, you will learn about the different document control libraries and how to create and configure the library.

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

Document Library 2 – Adding Documents

In this module, you will learn the different ways to add a document into a library.

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

Document Library 3 – Workflow

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

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

Document Library 4 – Team Members

In this module, you will learn how to access team members, add and configure a team member, provide availability in different DELMIAWorks modules, setup out of office delegates, replace and delete workflow responsibilities and access team member from different modules.

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

Quality Basics

In this module, 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.

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

ECO – Engineering Change Order

In this module, you will learn how to create different ECO's, ECO Workflow Approval Templates and approving an ECO via Workflow.

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 module, 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.

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

Inspection Setup

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

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

Quick Inspection

In this module, you will learn how to how to access Quick Inspections, how to enter data against parameters, available options and how to set the "Sample Comment on Failure" option, how to utilize and access Quick Inspections in other modules of DELMIAWORKS including Inspection Approvals and how to print sample log reports.

1. Access Quick Inspections
2. Enter Data for Quick Inspections
3. Access and Update Calculated Parameters
4. Set the "Sample Comment on Failure" option
5. Utilize Other Available Options
6. Approve Quick Inspections
7. Access Quick Inspections in DELMIAWORKS
8. Print Sample Log Report

Deviation

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

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

Gages and Devices

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

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

Vendor Maintenance

In this module, 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.

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

Accounts Payable Invoice

In this module, 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.

1. Understand the AP Invoice Screen
2. Generate and Post an AP Invoice
3. Utilize the Auto Invoice Option
4. Generate a Quick AP Invoice
5. Void an AP Invoice

Cash Disbursements

In this module, you will learn how to create a new cash disbursement group, create manual and system generated checks, make prepayments to a vendor, print checks and post the cash disbursement group.

1. Access the Cash Disbursement Module
2. Create a Cash Disbursement Group
3. Generate a Quick Check
4. Generate a Check for a Vendor
5. Generate a Check with "Select All Vendors"
6. Generate a Check with "Select from Invoice"
7. Print Checks and Post Groups

Customer Maintenance

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

1. Access the Customer Maintenance Module
2. Create a New Customer
3. Search for an Existing Customer
4. Create a Customer Contact
5. Utilize the Credit Status Tab
6. Utilize the Auto Invoicing Tab
7. Utilize the Forms/Reports Tab
8. Utilize the Miscellaneous Tab
9. Create a new Ship To Address
10. Utilize Options on the Details Sub-Tab
11. Associate a Customer to a Ship To Address
12. Utilize Options on the Distribution Sub-Tab
13. Utilize remaining Sub-Tabs for the Ship To Tab
14. Create a new Bill To Address
15. Create a Customer Template

Customer Maintenance - Credit Status Tab

In this module, 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.

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 - Credit Data Tab

In this module, 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.

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

Accounts Receivable Invoice

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

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

Accounts Receivable - Processing

In this module, you will learn how to create an invoice, add a packing slip, add an invoice note and post an invoice.

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

Accounts Receivable – Auto Invoicing

In this module, you will learn about Auto Invoicing for Customers (AR) including how to set and execute the Auto Invoicing Option, review AR Invoices, post all AR Invoices and how to create and process Cash Receipts.

1. Set and Execute the Auto Invoice Option
2. Review All Invoices
3. Post All Invoices
4. Create and Process Cash Receipts

Financial Reports

In this module, you will learn about financial reports including the different report types available, creating detail and summary financial reports and how to print financial reports.

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

Cash Receipts

In this module, you will learn how to create a new check, how to select a method for entering invoices, how to apply cash, how to write off a "bad debt" invoice, how to utilize cash receipts options, view totals in cash receipts and post a cash receipts batch.

1. Access Cash Receipts
2. Enter a new Check
3. Select Method to Apply Cash
4. Apply Cash with Show Open Accounts
5. Apply Cash by Invoice Number
6. Apply Cash by Packing Slip
7. Apply Cash by Enter on Account/Misc.
8. Apply Cash by VMI Reference Number
9. Write off an Invoice
10. View Total in Cash Receipts
11. Utilize Cash Receipt Options
12. Post a Cash Receipts Batch

General Journal

In this module, you will learn how to create three of the four types of general journal entries and explaining their purpose and functionality.

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

General Ledger – Create a Fiscal Year

In this module, you will learn how to setup a fiscal year.

1. Create a New Fiscal Year
2. Assign an EPlant to a Fiscal Year
3. Access the GL Year Picklist

General Ledger - Account Structure

In this module, you will learn an overview of the standard structure of General Ledger (GL) accounts including an explanation of the structure and how to set up a new GL account structure.

1. Understand GL Account Structure
2. Access GL Account Structure
3. Define a GL Account Structure
4. General Ledger Account Structure Example
5. Save the Account Structure

Account Type Maintenance

In this module, you will learn how to access the account maintenance screen, create a sub account.

1. Identify Major Account Types
2. Access Account Type Maintenance
3. Understand Account Type Maintenance Functions
4. Understand Sub-Account Functionality
5. Create a Sub-Account

Chart of Accounts

In this module, you will learn about the Chart of Accounts module, including how to set up a new chart of account.

1. Understand the Chart of Accounts
2. Create a Chart of Accounts

Budgets

In this module, you will learn about the Budgets Module, including understanding the Budget screen, how to create a new Budget and calculating the Budgets based on Sales and forecast data.

1. Utilize the Budgets Module
2. Create a Budget for an Account
3. Recalculate a budget

Bank Maintenance

In this module, you will learn how to access the Bank Manager, various fields available, how to create new bank and bank account records, how to reconcile a bank account, utilizing the check register, how to print bank reports.

1. Access the Bank Manager Module
2. Utilize Bank Information Fields
3. Create Bank and Bank Account Records
4. Utilize the Reconcile Option
5. Utilize the Check Register
6. Print reports

Finance Charges - Configure

In this module, you will learn how to access the AR and GL Setup tabs in System Parameters, configure charges on each of these tabs and how to configure a customer record to incur finance charges.

1. Access the AR and GL Setup Tabs
2. Configure Charges on the AR Setup Tab
3. Configure Charges on the GL Setup Tab
4. Configure Finance Charges for a Customer

Standard Costing - Setup

In this module, you will learn about the setup required in DELMIAWORKS to calculate the Standard Cost for items including how to create and set default GL Accounts, creating cost elements and assigning GL accounts to them, assigning overheard costs to MFG Types, Cells and inventory items and assigning labor costs to MFG Types, Cells and inventory items.

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

Standard Costing - Calculation

In this module, you will learn how to execute Standard Cost calculations in DELMIAWORKS for purchased and manufactured inventory items and covers available options and filters.

1. Utilize Standard Cost Options
2. Calculate Standard Cost for Purchased Items
3. Calculate Standard Cost for Manufactured Items
4. Utilize the Roll Average Cost to Standard Option

Posting Inventory Transactions (PIT) at Standard

In this module, you will learn instructions for the Post Inventory Transactions at Standard module. Including how to configure system parameters, understand transaction types, utilize the PIT module, view the options available and view posted transactions.

1. Understand System Parameters for Posting Inventory Transactions
2. Understand the Transaction Types in PIT
3. Post Inventory Transactions at Standard
4. View Options in PIT
5. View Posted Transactions in PIT

IACJ – Inventory Activity Cost Journal

In this module you will learn about the IACJ module available in versions 6.0 and higher which is utilized to post transactions and their associated costing and GJ entries to the system.

1. Access the IACJ Module
2. Filter and Access Transactions
3. Understand Recipe Card Creation
4. Understand the GL Distribution Section
5. Understand the Consumed Items Section
6. Post Transactions

Month End Closing Procedures-Periodic Inventory Method

In this module, you will learn about 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.

1. Overview of Month End Tasks
2. Set the GL Status
3. Utilize the "Trial Balance" Report
4. Reconcile Outstanding Purchase Receipts
5. Reconcile AP Invoices
6. Confirm Debit Memos
7. Confirm Cash Disbursements
8. Run the "Accounts Payable Aging- Any Period" Report
9. Close the A/P Status
10. Post Outstanding Packing Slips and Pick Tickets
11. Post Outstanding Shipments Pending Invoices
12. Confirm AR Invoices have been Posted
13. Confirm Credit Memos and Cash Receipts have been entered
14. Run the "Accounts Receivable Aging" Report
15. Close the A/R Status
16. Disposition all Production Reports
17. Reconcile Bank Accounts
18. Post General Journal Entries
19. Run Financial Statements
20. Close the G/L Status
21. End of Year Closing Procedures

Fixed Assets

In this module, 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.

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

Month End Closing Procedures-Perpetual Inventory Method for Standard Costing

In this module, you will learn about 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.

1. Overview of Month End Task
2. Set the GL Status
3. Utilize the "Trial Balance" Report
4. Reconcile Outstanding Purchase Receipts
5. Reconcile AP Invoices
6. Confirm Debit Memos
7. Confirm Cash Disbursements
8. Run the "Accounts Payable Aging- Any Period" Report
9. Close the A/P Status
10. Post Outstanding Packing Slips and Pick Tickets
11. Post Outstanding Shipments Pending Invoices
12. Confirm AR Invoices have been Posted
13. Confirm Credit Memos and Cash Receipts have been entered
14. Run the "Accounts Receivable Aging" Report
15. Close the A/R Status
16. Disposition all Production Reports
17. Post Inventory Transactions
18. Run and Compare Inventory Reports
19. Reconcile Bank Accounts
20. Post General Journal Entries
21. Run Financial Statements
22. Close the G/L Status
23. End of Year Closing Procedures

Payroll

In this module, you will learn how to utilize the Payroll module including payroll setup, employee payroll maintenance, and payroll preparation and posting.

1. Configure Payroll Taxes
2. Setup Deductions
3. Utilize the Wages, Taxes, Deductions and Direct Deposit fields in Employee Maintenance.
4. Manage Time Clock Entries
5. Prepare Payroll
6. Utilize Direct Deposit

Time & Attendance

In this module, 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,

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. Tasking In & Out
12. Task Classes
13. Task Clock In/Out Maintenance
14. **Time & Attendance Pre-post Log**

Customer Relationship Manager-CRM

In this module you will learn about basic functionality of CRM including an overview of the CRM module and how to enter in CRM activities and opportunities to assist in tracking interactions with people and companies outside of your organization.

1. Understand CRM Today Basics
2. How to create a CRM activity and Support issue
3. Utilize the Sales and Marketing features
4. Utilize Opportunity Central
5. Utilize CRM options and filters

Workforce

In this module, 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

DELMIAWorks Update Content

What's New V 16 – Non -Accounting

This module provides detailed information about the non-accounting upgrades to DELMIAWORKS version   16

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 V 16 – Accounting

In this module, you will be introduced to version 16 accounting functionality within DELMIAWorks.

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

What's New V 16.2 – Non -Accounting

In this module, you will be introduced to version   16.2 non-accounting functionality within DELMIAWorks.

1. Bill of Material – Certified Employee Tab
2. RealTime – RealTime Inspection Frequency
3. Price Book Maintenance

What's New V 16.2 – Accounting

In this module, you'll be introduced to version   6.2 accounting functionality within DELMIAWorks.

1. AP Invoice Updates
2. AR Invoice Updates
3. Terms Distribution – Configure Installments

What's New DW2020 – Accounting

In this module, you will be introduced to version DW2020 accounting functionality.

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

What's New DW2020 – Non-Accounting

In this module, you'll be introduced to version DW2020 non-accounting functionality.

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

What's New DW2020x – Non-Accounting

In this module, you will be introduced to version DW2020x non-accounting functionality.

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

In this module, you'll be introduced to version DW2020x accounting functionality.

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

What's New DW2021 – Non-Accounting

In this module, you'll be introduced to version DELMIAWorks 2021 non-accounting functionality.

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 DW2021 – Accounting

In this module, you'll be introduced to version DELMIAWorks 2021 accounting functionality.

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 DW2021x

This training session provides information regarding version DELMIAWorks 2021 x updates to accounting and non-accounting features and functionality. It also provides the Know Before You Go and Hardware Requirement documents available for DELMIAWorks 2021x.

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

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 - 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 DELMIAWORKS 2020x Overview

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

What's New DELMIAWorks 2020   Overview

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

Webinars

Webinars are recorded sessions conducted by certified DELMIAWorks Training Specialists and provide an overview style of training for DELMIAWorks topics by addressing day to day operations, common tasks, active troubleshooting and common scenarios while discussing pros and cons of various options.

Bill of Lading (BOL) & Shipping Manager

During this recorded webinar, users will be shown how to utilize the Bill of Lading and Shipping Manager modules including shipping class setup and basic BOL navigation, creating BOL's via the module and packing slips, archiving BOL records, printer & scale setup, configuring Ship Via's, accessing the Shipping Log, running reports in Carrier Maintenance, processing domestic and international shipments and closing shipments in Shipping Manger.

Database Structure

During this recorded webinar, users will be introduced to the basics of a relational database and in particular, the naming conventions and structure of the DELMIAWORKS database including how to write IQAlerts, creating labels, and creating SmartPage gauges, KPI's and BI Dashboards.

Material Exceptions

During this recorded webinar, users will be shown how to utilize the Material Exceptions List in Finite Scheduling, including how to drive material requirements, how to utilize the MRP engine via update schedule, review Daily Projected Requirements functionality, how to navigate and utilize each tab within the Material Exceptions screen and running Material Exceptions reports.

Pick Tickets & Packing Slips

During this recorded webinar, users will be shown the basics of Pick Tickets and Packing Slips including how to create each, adding items to Pick Tickets, options available in each module, converting Pick Tickets to Packing Slips, running reports and how to create Manual Packing Slips.

Purchasing

During this recorded webinar, users will be shown the Purchase Order screen and each section available, AKA Buying functionality and Unit of Measure (UOM) applications, pricing hierarchy, cloning purchase orders, creating Purchase Orders from Material Exceptions directly, archiving Purchase Orders, generating releases for Purchase orders, utilizing boiler plates, printing & emailing Purchase Orders via IQAlerts, and utilizing Auto EForms.

Purchase Order Receiving

During this recorded webinar, users will be shown functionality available in the Purchase Order receiving module including basic navigation within the module, how to receive items and releases, how to print receiving tickets and labels upon posting receipts, posting and voiding receipts, posting and voiding rejects posted against the receipts, how to handle over receiving of items, and how to handle receipt inspection due alerts.

Production Reporting by Shift

During this recorded webinar, users will be shown functionality available in regards to utilizing the Production Reporting by Shift module including how to review new, open and archived production reports, how to disposition RealTime generated and non-RealTime generated production reports, how to view and edit Downtime hours and codes, how to record labor manually and using Time & Attendance, recording good parts and rejects on the production report, setting backflush parameters, utilizing the substitute materials and "Freeze Calc" options, the disposition location hierarchy and how to archive production reports.

Work Order Generation

During this recorded webinar, users will be shown functionality available in regards to Work Order Generation including how sales orders interface with work orders, the MRP Engine functionality, how to schedule work orders, work order parameters that are available, the different types of work orders, work order statuses that are available and tools for interpreting demand including the Finite Schedule and MPS (Master Production Schedule).

Multicurrency

During this recorded webinar, users will be shown how to utilize the Multicurrency within the software including required setup to perform Multicurrency transactions and how to execute the various types of financial transactions including realization of gain/loss and month end revaluation.

Document Control

During this recorded webinar, users will be shown how to utilize the Document Control module including how to create libraries, the differences between the different library types, an overview of library and document security options, how to add documents to a library, how to check documents into and out of a library, how to utilize routing & template based workflow types to approve documents including setup, how to associate documents throughout the software using the Documents tab, reviewing document history and revisions and how to search for text in documents.

Estimating (Generic)

During this recorded webinar, users will be shown functionality available in regards to the RFQ (Request for Quote) module available including reviewing the RFQ Log, Engineering Quote & Visual Route Quoting, how to create, clone and convert an RFQ into a Bill of Material, how to input information on the General tab including labor, overhead and material costs, how to attach components, packaging and operations on the Item Details tab, review parameters available on the Calculations tab along with quantity breaks and extra charge functionality, creating an RFQ for an outsourced item and how to prepare a quote letter for a completed generic quote.

Sales Orders

During this recorded webinar, users will be shown how to utilize the Sales Order module including basic navigation, creation of new sales orders in both basic and quick order entry mode, adding inventory including AKA and miscellaneous items to a sales order, addressing UOM conversions, pricing, how to generate releases, printing order acknowledgements or email a copy of the sales order using Auto EForms and how to archive sales orders.

ShopData

During this recorded webinar, users will be shown functionality available in the ShopData executable including how to access Time Clock functionality and utilizing the following options: RT Monitor and RT Work Centers, Plant Layout, Inventory Transactions & Locations, Rejects & Reject Reporting, Downtime Reporting, Internal & External Documents, Printing Labels, Quick Inspection and MRO Work Orders.

Advanced WMS Overview

During this recorded webinar, users will be shown an overview of Advanced WMS and its functionality including setup and executing transactions.

Advanced WMS Setup

During this recorded webinar, users will be shown setup for Advanced WMS functionality including configuring Inventory Transaction Rules, Inventory Aisles, Location Types, Inventory Zones, Aisle Locations, BOL data, Inventory Groups, Locating & Picking Rules, Inventory Transaction Location Plans and WMS User Profiles.

Finite Scheduling

During this recorded webinar, users will be shown how to utilize the Finite Schedule module including basic navigation, different views available, how to access the MRP engine/material exceptions list/capacity & labor planning, scheduling work orders manually, prioritizing jobs by Must Start Dates, review BOM parameters and Runs Best information and reviewing scheduling parameters.

Forecast

During this recorded webinar, users will be shown how to utilize the Forecast module including how to generate Production and Sales Analysis forecast data, creating groups and assigning items, how to manually enter forecast data or system generate, how to generate work orders based on production forecasts and available options, reviewing material exceptions and machine/labor capacity and using the explode forecast tool.

Physical Inventory by Item

During this recorded webinar, users will be shown how to conduct a Physical Inventory in DELMIAWorks including an overview of the two methods available (Full Physical and Worksheet), a discussion regarding timing and product movement, how to create and maintain inventory tags, how to verify inventory counts and prepare the Adjustment File, confirming and posting inventory counts based on the method utilized, discussing how and why to clear inventory tags and an overview of Cycle Counting.

Kanban Basics

During this recorded webinar, users will be shown requirements for calculating requirements for Kanban cards for purchased and manufactured items, how to link Kanban cards to purchase orders, updating the status of Kanban cards, how to link Firm manual work orders to Kanban cards and utilizing Kanban Supermarket features.

Role Based Learning

Role Track Modules

Role Track Modules contain several technical modules in one convenient location (course) so learners can access content based on general business & manufacturing roles. Progress is automatically saved and quizzes are provided for each module listed.

Getting Started

This module includes the following modules applicable for any job position. The associated modules are presented in the following order with quizzes at the end of each topic:

1. Basic Navigation
2. Smart Page
3. 101   Troubleshooting

Maintenance Technician

This module includes the following modules and their associated modules in the following order:

1. Shop Calendar -Configure
2. IQRF
3. WMSIQ
4. MRO – Maintenance, Repair, Overhaul

Machine Operator

This module includes the following modules and their associated modules in the following order:

1. IQRF
2. WMSIQ
3. MRO – Maintenance Repair Overhaul
4. RealTime Setup and Production Monitoring
5. Shop Data

Production Manager

This module includes the following modules and their associated modules in the following order:

1. BOM - Configuration
2. Work Centers – Creation & Configuration
3. Work Orders
4. Shop Calendar - Configuration
5. Forecast
6. Finite Scheduling
7. RealTime Setup & Production Monitoring
8. RealTime Process Monitoring
9. ShopData
10. Production Reporting

Inventory Manager

This module includes the following modules and their associated modules in the following order:

1. Inventory Item Creation
2. Inventory – AKA Buying
3. Inventory – Transactions & Locations
4. Bill of Material Configuration
5. Outsourcing
6. Physical Inventory
7. Label Designer & Hierarchy
8. Production Reporting
9. Purchase Orders – Create & Receive
10. Pick Ticket Overview
11. Packing slip Overview
12. Customer RMA's
13. Vendor RMA's

Material Handler

This module includes the following modules and their associated modules in the following order:

1. Daily Material Staging Requirements
2. Physical Inventory
3. IQRF
4. WMSIQ
5. Label Designer & Hierarchy

Purchasing & Receiving

This module includes the following modules and their associated modules in the following order:

1. Material Exception List
2. Daily Material Staging Requirements
3. Forecast
4. Vendor Maintenance
5. Purchase Orders – Create & Receive
6. Purchase Orders – Approve w/ Workflow
7. Purchase Orders – Email
8. Vendor RMA

CEO/CFO/COO – High Level Management

This module includes the following modules and their associated modules in the following order:

1. Basic Navigation
2. Smart Page
3. Full User Guide – Learning Experience for DELMIAWorks

Shipping Department

This module includes the following modules and their associated modules in the following **order:**

1. Bill of Lading (BOL)
2. Pick Ticket Overview
3. Packing Slip Overview
4. Ship Via Maintenance
5. Carrier Maintenance
6. Vendor RMA

Customer Service or Sales Representative

This module includes the following modules and their associated modules in the following order:

1. CTP – Capable To Promise
2. Sales Quotations
3. CRM – Customer Relationship Management
4. Sales Orders – Overview
5. Customer RMA's

Human Resources Manager

This module includes the following modules and their associated modules in the following order:

1. CRM – Customer Relationship Management
2. Payroll
3. Workforce
4. Time & Attendance

Quality Assurance Technician

This module includes the following modules and their associated modules in the following order:

1. Overview of Quality Module Relationships
2. Quality Basics – Team Members & Workflow
3. Deviations
4. ECO – Engineering Change Orders
5. CAR – Corrective Action Reports
6. Document Control – Overview
7. MRB – Material Review Board
8. Quick Inspection

Quality Assurance Manager

This module includes the following modules and their associated modules in the following order:

1. Overview of Quality Module Relationships
2. Quality Basics – Team Members & Workflow
3. Inspection Setup
4. Quick Inspections
5. Document Control - Create a Library
6. Document Control 2 – Adding Documents
7. Document Control 3 – Workflow
8. Document Control 4 – Team Members
9. MRB – Material Review Board
10. ECO – Engineering Change Order
11. CAR – Corrective Action Reports
12. Deviations

Controller

This module includes the following modules for a Controller role in the following order:

1. Account Type Maintenance
2. Bank Maintenance
3. Finance Charges – Configuration
4. Financial Reports
5. Budgets
6. General Journal
7. General Ledger
8. Standard Costing – Setup
9. Standard Costing – Calculations
10. Auto EForms
11. IACJ - Inventory Activity Cost Journal

Accounts Receivable

This module includes the following modules and their associated modules in the following order:

1. AR Invoice – Overview
2. AR Invoice – Processing
3. AR Invoice – Auto Invoicing
4. Cash Receipts
5. Customer Maintenance – Overview
6. Customer Maintenance – Credit Data Tab
7. Customer Maintenance – Credit Status Tab
8. Customer RMA

Accounts Payable

This module includes the following modules and their associated modules in the following order:

1. Vendor Maintenance
2. AP – Invoice
3. Cash Disbursements
4. Purchase Orders – Create and Receive
5. Vendor RMA

System Administrator – General

This module includes the following modules and their associated modules in the following order:

1. IQAlerts – Actions
2. IQAlerts – Groups
3. Security Inspector – Create Users
4. Security Inspector – System Deny Role
5. Troubleshooting 101

Licensed Learning Paths

These Learning Paths are created based on Dassault Systemes Licensing. Lessons are listed in the order they appear on the platform. Progress is saved and quizzes are provided at the end of each module within the Learning Paths.

General Role

1. Basic Navigation
2. System Parameters – List of Lists
3. Smart Page
4. Troubleshooting   101

Human Capital Management Role

1. Time & Attendance
2. Payroll
3. Workforce

Maintenance Technician Role

1. Maintenance, Repair Overhaul
2. Project Manage

ERP System Administrator Role

1. System Parameters – List of Lists
2. Security Inspector – Create New Users
3. Security Inspector – Lower Tabs
4. Quality Basics – Team Members and Workflow
5. Webinar – Database Structure

Business Operations Role

1. Vendor Maintenance
2. Accounts Payable Invoice
3. Cash Disbursements
4. Vendor RMA
5. Quality Basics – Team Members and Workflow
6. Purchase Orders – Create and Receive
7. Purchase Orders – Approve w/ Workflow
8. Webinar – Purchasing
9. Webinar – Purchase Order Receiving
10. Customer Maintenance
11. Customer Maintenance – Credit Status Tab
12. Customer Maintenance – Credit Data Tab
13. Accounts Receivable Invoice
14. Accounts Receivable Invoice – Processing
15. Accounts Receivable Invoice – Auto Invoicing
16. Cash Receipts
17. SmartPage
18. Sales Orders – Create
19. Sales Orders – Generate Releases
20. Customer RMA
21. Ship Via Maintenance
22. Lot Number Tracking
23. Inventory – Create a New Item
24. Inventory – Transactions and Locations
25. Webinar – Document Control
26. Document Library   – Creating a Document
27. Document Library 2 – Adding Documents
28. Document Library 3 – Workflow
29. Document Library 4 – Team Members

Financial Administrator Role

1. Chart of Accounts
2. Financial Reports
3. General Journal
4. General Ledger – Create a Fiscal Year
5. General Ledger – Account Structure
6. Budgets
7. Vendor Maintenance
8. Accounts Payable Invoice
9. Cash Disbursements
10. Vendor RMA
11. Bank Maintenance
12. Customer Maintenance
13. Accounts Receivable Invoice
14. Accounts Receivable – Processing
15. Accounts Receivable – Auto Invoicing
16. Cash Receipts
17. IACJ – Inventory Activity Cost Journal
18. SmartPage
19. Inventory – Transactions and Locations
20. Month End Closing Procedures – Periodic
21. **Month End Closing Procedures – Perpetual**

Production Engineer Role

1. Webinar – Estimating (Generic)
2. Bills of Material – Configuration
3. Bills of Material – ASSY Configuration
4. Inventory – Create a New Item
5. Document Library   – Creating a Document
6. Document Library 2 – Adding Documents
7. Document Library 3 – Workflow
8. Document Library 4 – Team Members
9. Inventory – Transactions and Locations
10. Smart Page

Quality Assurance & Control Role

1. Quality Basics
2. MRB – Material Review Board
3. ECO – Engineering Change Order
4. CAR – Corrective Action Report
5. Deviation
6. Inspection Setup
7. Quick Inspection

Production Planner Role

1. Bills of Material – Configuration
2. Bills of Material – ASSY Configuration
3. Finite Scheduling
4. Material Exception List
5. Daily Material Staging Requirements
6. Daily Parts Projection
7. Work Orders – Create
8. Document Library   – Creating a Document
9. Document Library 2 – Adding Documents
10. Document Library 3 – Workflow
11. Document Library 4 – Team Members
12. Production Reporting (PRS, PRW, PRA)
13. ShopData
14. **Smart Page**

Logistics & Distribution Manager Role

1. Inventory – Transactions and Locations
2. Purchase Orders – Create and Receive
3. SmartPage
4. Vendor RMA
5. Customer RMA
6. Ship Via Maintenance
7. Bill of Lading (BOL) – Module and Packing Slips
8. Webinar – Bill of Lading and Shipping Manager
9. Lot Number Tracking
10. Packing Slip Overview
11. Pick Ticket Overview
12. Webinar – Pick Tickets and Packing Slips

Shop Floor Role

1. ShopData
2. Webinar – ShopData
3. JobShop
4. Assembly Track
5. Webinar – Assembly Track Overview
6. AssemblyData
7. Webinar – AssyData Overview
8. RealTime Setup and Monitoring
9. RealTime Process Monitoring

Inventory & Warehouse Control Role

1. Inventory – Create a New Item
2. Inventory – Pricing Hierarchy
3. Inventory – AKA Selling Tab
4. Inventory – AKA Buying Tab
5. Inventory – Transactions and Locations
6. Pick Ticket Overview
7. Packing Slip Overview
8. Webinar – Pick Tickets and Packing Slips
9. WMSIQ
10. Webinar – Advanced WMS Overview
11. Webinar – Advanced WMS Setup
12. Lot Number Tracking
13. Serial Number Tracking
14. Ship Via Maintenance
15. Bill of Lading (BOL)
16. Shipping Manager
17. Customer RMA
18. Vendor RMA

Technical Summary Modules

Technical Summary modules combine Technical Modules by DELMIAWorks software functionality in one convenient location with extended videos and additional resources such as manuals and webinars.

Document Control

1. General Document Control Information
2. Quality – Document Control Manual
3. Technical Video
4. Webinar – Document Control
5. Quiz

Assembly (ASSY) Manufacturing

1. General ASSY (Assembly) MFG Information
2. Technical Videos
3. ASSY (Assembly) MFG Manual
4. Webinar – ASSY Bills of Material
5. Webinar – Assembly Track

Advanced Certifications by Role

The **Advanced Certification by Role Library** contains certification module content for specific DELMIAWorks roles.

All lessons located in these certification modules are also available in the general Learning Experience for DELMIAWorks library in the Advanced Learning Library..

<u>A certificate of completion is provided to users who complete all content and the Certification Exam with an 80% or higher score.</u>

Please contact delmiaworks.elearning@3ds.com for your exam upon completion of the module.

System Administrator & DBA Specialist

System Admin & Data Tools Overview

Role Based – System Admin

Database Structure

Data Load Tools

Security Inspector- Create New Users/Lower tabs

Team Members

EPlant Setup

Troubleshooting 101

User Migration

Document Control – Webinar

Crystal Report Basics

Label Designer/Label Hierarchy & Designer

Label Maintenance

WMSIQ / IQRF

RT Setup & Monitoring

RT Process Monitoring Setup

RT Device Map

RT Chart Setup

Installing a Second Instance

Spreadsheet Server Power Report Designer - Query Designer

Import External File Utility

DD

IQStatus

IQAlerts & Backups

Smart Page

WebAPI SDK

Application Manager

Solidworks Import Tool

IQTrace

IQArchiver

IQEvent Log

IQPurge

IQExtension

Certification Exam

QMSI – Quality Specialist

QMSI Specialist Overview
Quality Basics
Quality Assurance Technician
Quality Assurance Manager
Team Members
Doc Control
Customer RMA
Vendor RMA
Lot Number Tracking
Track & Trace
MRB
CAR/CAPA
Deviation
ECO
Control Plans
Risk Assement (FMEA)
Quality Audit
Quality Projects
Cost of Quality
Certification Exam

QMSII – Quality Specialist (Advanced)

QMS II (Advanced) Specialist Overview
Role Based - Quality Assurance Manager
Gages & Devices
Inspection Setup
Quick Inspection
Inspection Record Approval
In-Process Inspection Log
SPC - Past Inspections
CMM Import
RT Process Monitoring
RT Chart Setup
RT Historian / Doc Repository
Certification Exam

Manufacturing I Specialist

Manufacturing I Specialist Overview

Work Centers - Backflush

Shop Calendar

BOM Configuration

Outsource

Visual BOM Routing

Work Orders - Create

Finite Scheduling

MRO TASKs/Equipment

MRO WO Processing

MRO Work Order Basics

Rough Cut Capacity & Daily Projected Req

RT Setup & Monitoring

Shop Data

T&A Clock / Task

Print Labels - Inv / RT/ SO

RT Scans / Pallet Builder (Shop Data)

WMS/IQRF

Production Reporting

Label Designer

Label Maintenance / Hierarchy (Barcode Labels)

Lot # Tracking

Serial # Tracking

Assembly Processes

BOM Assembly (ASSY 1 - 3)

Assembly Track Overview (6)

Assembly Track Session

Line Clearance

ASSY Data Overview

ASSY Data Session

Rework Reporting Process

Final Assembly

Certification Exam

Supply Chain I Specialist

Supply Chain I Specialist Overview
Lot # Tracking
Serial # Tracking
Print Inventory Labels
Print RealTime Labels
Print Sales Order Labels
Daily Material Staging
Hard Allocate to Work Order
Work Order Materials & Components
Inventory Transactions and Locations
RT Scan to Inventory
WMS/IQRF
Track and Trace
Sales Quotations
VMI
Outsource & Outsource Central
Forecast
CRM
Carrier Maintenance
Certification Exam

Supply Chain II (Advanced) Specialist

Supply Chain II Specialist Overview
Serialized Inventory Control
Web Order Import
Advanced WMS
AWMS- Directed Task Monitoring
Dock Scheduler
Expected PO Receipts
Inventory Transaction Rules
Receiving by Receipt #
Wave Management Sales Order Picking
Wave Management Work Order Staging
WMS Teams
Carrier Maintenance
Certification Exam

Production Engineer

Overviews

Overview modules provide a high level view of DELMIAWorks software topics and functionality and include the basic modular relationships, basic tasks and workflows and summary information about each topics.

SOFTWARE

Inventory Module

This training session provides an overview look into the Inventory Module including: how to create a new inventory item, search for an existing item, review the main inventory tab, and examine the menu and speed button options available.

Security Inspector Module

This training session provides an overview of Security Inspector including: how to create new users, assign and create new roles & groups, and assign those roles & groups to users.

WebIQ

This training session provides an overview of **WebIQ** including how to reach the WebIQ Landing Page, review the modules offered in WebIQ, navigate the page structures found in WebIQ and see picklists and menu options.

Document Control

This training session is an overview of the Document Control module including how to create and replace team members, how to create libraries, the differences between the different library types, how to add documents to a library, how to check documents into and out of a library, and how workflow works when approving (or denying) a document.

Assembly Complex Lines

This training session is an overview of Assembly Complex Lines, including why a one should utilize complex lines, the difference between ASSY2 and ASSY3 setups, how to structure ASSY2 and ASSY3 BOMs correctly, and how reporting work orders differ for Assembly Complex Lines.

PPAP/PPQ

This training provides an overview of the **Purpose & Use of Advanced Product Quality Planning (PPAP/PPQ) module in DELMIAWorks** including templates and workflow, a demonstration of utilizing PPAP and how resources are utilized to ensure customer satisfaction.

Intercompany Transfers (ICT)

This training session outlines the Intercompany Transfer (ICT) Process in DELMIAWorks including reviewing what can be transferred, the setup and configuration for successful ICT's, and discuss how Kanban triggers can be used to generate and facilitate these transfers.

ROLES

Manufacturing I Specialist Overview

This training session provides an overview for a **Manufacturing I Specialist** in DELMIAWorks including how to access the SOLIDWORKS add in installation, a review of some of the modules found under the manufacturing and estimating tabs, ShopData and AssemblyData.

Manufacturing II (Advanced) Specialist Overview

This training session is an overview the Manufacturing II Specialist role in DELMIAWorks, including how to access RealTime Information, learn more about how labels function in the software and discuss some of the key shipping & receiving functionality.

System Administrator & DBA Specialist Overview

This training session provides an overview for a System Administrator & DBA Specialist to properly manage DELMIAWorks: including how to install the SOLIDWORKS add-in, IQPurge, IQArchive, how to use the Import External File Utility.

Supply Chain II Specialist Overview

This training session provides an overview for a **Supply Chain II Specialist** within DELMIAWorks including descriptions of Serialized Inventory Control, Web Order Import, AWMS Task Monitoring, and Dock Scheduler.

QMSI Specialist Overview

This training session is an overview of the QMS I Specialist role within DELMIAWorks including descriptions of the quality modules used as a QMS I specialist, what the RMA process is like, and a review of different lot number tracking methods.

QMSII Specialist Overview

This training session is an overview of QMS II Specialist role within DELMIAWorks which includes descriptions of Serialized Inventory Control, Web Order Import, Transactions Rules, AWMS Task Monitoring and Dock Scheduler.

Production Engineer Overview

The following is an overview of the Production Engineer Specialist role as it relates to the DELMIAWorks including, the SolidWorks import tool, how to view & set up different types of Bills of Material, review the Assembly Process & Complex line, as well as a review of several DELMIAWorks Quality modules.

ADVANCED Learning

Advanced Learning content is presented by Training Specialists and covers advanced skill level topics for DELMIAWorks software functionality, and are also available within the Certifications by Role Library.

Team Members

This training session provides an overview of the Team Member Module: including important settings, file paths, delegates, and calendar setup.

EPlant Setup

This training session provides an **overview of EPlant Setup including**: Why a company should use EPlants, the difference between EPlants and Divisions, and how to implement EPlants.

User Migration

This training session provides an overview of the User Migration Tool: including the different methods available to best facilitate the transfer of Oracle users from one Database to another.

Label Designer

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

Label Maintenance

This training session provides an overview of Label Maintenance including: defining label setup, setting up Label Maintenance, understanding the Label Hierarchy, OS Service Credentials, and Linking DELMIAWorks to Label Matrix

RT Device Map

This training session provides an overview of the **RealTime Process Monitoring Device Mapping Setup** including: The Setup Procedure, a detailed review of the tech note, how to launch the server, how to log in to the device setup application using DBA credentials

RT Chart Setup

This training session provides an overview of the **RT Charts setup**: including the installation of RT Charts, the RT Charts Web Application setup, and the add and remove capabilities of RT Charts.

2nd Instance Install

This training session provides an overview of the RealTime Historian/Secondary Database Install: including creating multiple installations of Oracle , using the installer, understanding the data fields and what the different database instances do.

SSS Power Report Designer - Query Designer

This training session provides an overview of the Query Designer add on Tool for Spreadsheet Server including: How to build queries using Query Designer, how to navigate the visual tool, import/export pre-configured queries, use the parameters from a spreadsheet for a query and perform dynamic calculations.

Import External File Utility

This training session is an overview of the Import External File Utility Tool: including how to view External Source Formats, set up Import Schemas, and identify the different import tables and fields.

WebAPI SDK

This training session provides an overview of the Web API SDK feature, including common tool requirements, sample applications, and what programming language can be used for the creation of Web API's.

Application Manager

This training session provides an overview of the Application Manager executable including installation requirements and server setup instructions.

Solidworks Import Tool

This training session provides an overview of the SolidWorks Add-In Tool: including what the tool is and who specifically it is for. How the SolidWorks Add-In Tool is incorporated into DELMIAWorks and how SolidWorks files are created as an extension of Document Control.

IQTrace

This training session provides an overview of the IQTrace including: how setup IQTrace tables and how it affects overall system performance. This training will also take a look at how to view traced data and what fields are best to be monitored.

IQArchive

This training session provides a detailed overview of IQArchiver: including the benefits, best practices, and identifying what modules can be used in conjunction with this tool.

IQEvent Log

This training session provides an overview of the IQEvent Log: including how it displays error codes, where it can be accessed, filtering the log by date range how to view time stamps, and brief error code descriptions.

IQPurge

This training session provides a detailed look at the IQPurge Functionality including: the purpose of IQPurge, the difference between archived and purged data, identifying tables to be purged, and utilizing SQL statements during a purge

IQExtension

This training session provides an overview of IQExtension: including the two types of extensions used, how the extension type is setup, why there is a extension script and how to set that script up.

Dispatch List

This training session provides an overview of Dispatch List Functionality including common features, adding, deleting & removing processes, using Dispatch Lists in conjunction with ASSYDATA, running update schedule for processes, and using auto load.

In-Process Inspection Log

This training session provides an overview of **In Process Inspection Log** functionality in DELMIAWorks including interaction with the Inspection Setup module, how to utilize application parameters and how to enter Data into an In Process Inspection Log.

Line Clearance – Assembly Track

This training session covers **Line Clearance** functionality for Assembly Track including utilization & benefits of Line Clearance, modular interaction with Assembly Data, how processes from Assembly Track are utilized within Line Clearance, supervisor functionality including clearing lines and employee clock in procedures affected.

MRO: Equipment Tasks

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

MRO: Work Order Basics

This training session outlines MRO (Maintenance, Repair Overhaul) module Work Order basics including Task and Work Order interaction, features of MRO Work Orders, general menu options/speed buttons and accessing important reports.

MRO - Work Order Processing

This training session is an overview of processing Maintenance, Repair and Overhaul (MRO) Work Orders including how to generate MRO work orders, options work order creation, utilizing the work order planner, how to close tasks and archive work orders.

Rework Processes – Assembly Track

This training session provides information about Rework Processes for Assembly Track including basic functionality, effects on other rework processes & sequential processing functionality, utilizing rework processing in Assembly Data and how to report against rework processes.

Statistical Process Control (SPC) Past Inspection

This training session outlines Past Inspection for SPC (Statistical Process Control) functionality including a review of the General and Inspection tabs in the SPC module, review speed button options and utilize the SPC Chart wizard.

FMEA & Risk Assessment

This training session covers **FMEA and FMEA Risk Assessment** module functionality including differences between these modules and their functionality, FMEA Document features and a discussion of general best practices.

Quality Audits

This training session outlines the **Quality Audit** module including how to set up templates, types of audits available, how to configure and utilize workflow, scheduling & archiving audit records and how to execute an audit.

Cost of Quality

This training session outlines the Cost of Quality Module including, how to access the Cost of Quality module, set up groups, queries in the Cost of Quality Module, and how to use the module itself.

Visual BOM Routing

This training session outlines the Visual BOM Routing diagram including, the difference between Visual and Text-based BOM's, using the NEW and LIKE NEW functions, understanding the color-coding features, learn how to use to Cost/Quote speed button and the similarities to the BOM details and work order routing functionality.

Control Plans

This training session outlines the Control Plan Module, including its relationship to other modules, a demonstration of how to use the Control Plan module, and the features available while utilizing it.

Corrective Actions (CAR/CAPA)

This training session outlines the Corrective Action - CAR/CAPA Module in DELMIAWorks, including its relationship to other modules, the purpose of corrective action, review templates & workflow routing, and discover how to populate the record.

Vendor Managed Inventory (VMI)

This training session outlines Vendor Managed Inventory (VMI) in DELMIAWorks, including identifying critical processes, understanding the data flow, reviewing initial setup, demonstrating each step in the process, and reviewing VMI Transactions in Inventory.

Forecast – Basics

This training session outlines the Forecast Module basics in DELMIAWorks, including the two types of forecasts available, how to filter data by Forecasts, how forecast groups are used, the different methods used to create forecasts, and how to use speed buttons and right-click options.

Forecast – Generation

This training session outlines Forecast Generation in DELMIAWorks, including the difference between Production and Sales Forecasts, how Production Forecasts generate work orders, what modules affect the Forecast module, and a demonstration of exploding forecasts and importing/exporting forecasts.

Assembly Process Maintenance

This training session outlines the Assembly Process Maintenance module in DELMIAWorks including how Assembly Processes are utilized in ASSY (Assembly) BOM's, defining data fields in the process screen and available options, review key functionality in the Processes Maintenance screen, and understand various settings.

AssyData – Main Application

This training session outlines the AssemblyData executable, which includes how AssemblyData works with the Assembly Track module, how the task clock and time clock interact with one another, how employees clock in and out to report and reject parts, as well as important Assembly Data functions.

Application Manager

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

Vendor RFQ

The following module explores how to create a Vendor RFQ as it relates to DELMIAWorks functionality, including sources for Vendor RFQ's, how to create Vendor RFQ templates, understanding critical fields in the Vendor RFQ, and how to affect pricing breaks and quantities when it comes to Vendor RFQ's

APQP - Advanced Product Quality Planning

This training session outlines the Advanced Product Quality Planning module including the purpose of APQP, how to set up templates, how to understand communication in the workflow process and how to minimize risks during product launch.

Statistical Process Control (SPC) Inspection Setup

This training session outlines the Statistical Process Control (SPC) Inspection Setup module, including the SPC measurement structure, review the setup and approval process, discuss SPC documentation, and walk through how to complete a SPC process and deploy the measurements to the shop floor.

Shipping Manager

This training session outlines Shipping Manager including mandatory setup, the various ways to setup Shipping Manager, how to understand what fields are required, learning the differences between international and domestic shipments, and understand what services require End of Day processing

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.

Inspection Approval

This training session outlines the Inspection Approval Module, including the purpose of Inspection Approvals, and how the Inspection Approval module is linked to other areas of the DELMIAWorks system.

Bill of Lading (BOL) Signature Capture

This training sessions provides details regarding the Bill of Lading (BOL) Signature Capture including how to activate this feature, review setup steps, setup Android Tablets, how to capture a signature and where it is stored for report building purposes.

Customer VMI

This training sessions 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, how to process VMI consumption, and the difference between voids and returns.

Work Order - Hard Allocation

This training session outlines the process of Hard Allocating Material to a Work Order, including the purpose of hard allocating materials and what the various fields mean for a Work Order to be Hard Allocated. This session will also demonstrate hard allocating materials to a work order as well as deleting hard allocated components from a work order.

Serialized Inventory Control

This training session outlines Serialized Inventory Control in DELMIAWorks, including defining what serialized inventory control (or SIC) is, and how to use SIC for shipping, receiving, and dispositioning items. In addition, this training will define how to manage SIC inventory and perform Physical inventory for SIC items.

Implementation Methodology for DELMIAWorks

This training session outlines the 4 phases for a full implementation project with DELMIAWorks and the required tasks to complete each and how different DELMIAWorks team members assist with each phase. SMB customers please speak with your consultant.

WebIQ Learning

This library houses all training content for WebIQ functionality including user introduction and overview with individualized role based training.

Getting Started

This training session outlines the basics of WebIQ, including reviewing the features on the main landing page, analyzing the modules available in this version of WebIQ, outlining the navigation tools, highlighting the functions on the picklists, and comparing and contrasting features not carried over from the desktop version. This training best suited for a seasoned DELMIAWorks user, learning WebIQ for the first time.

New User Introduction

This training session outlines WebIQ as an overview for brand new users, including how to reach the WebIQ Landing Page, review the modules offered in WebIQ, navigate the page structures found in WebIQ and see picklists and menu options.

Inventory Master - Manufacturing Roles

This training session outlines the Visual BOM Routing diagram including, the difference between Visual and Text-based BOM's. This session will also cover using the NEW and LIKE NEW functions, understanding the color-coding features, learn how to use to Cost/Quote speed button, and the similarities to the BOM details and work order routing functionality.

Inventory Master - Non-MFG Roles

This training session provides an outline of WebIQ and the Inventory Master for Non-Manufacturing Roles including: how to identify key menu functions, learn the manufacturing purpose of each tab in the module, see how speed buttons operate in the module, learn how buyers and schedulers can use this module, and understand how the various inventory field affect the manufacturing role.

Assembly Processes

This training session outlines Assembly Processes in WebIQ, including how an assembly process is used in BOMs, defining critical fields in the Processes screen, and learn how the dialog checkboxes affect BOM work order reporting. In addition, learn essential functions of the lower sections and see how different process settings affect the throughput and the costs of the item.

Purchase Orders

The following training session outlines Purchase Order Basics in WebIQ, including interpreting the data in each section of this module, learning how to generate a PO in WebIQ, and reviewing the three different 'add item' speed buttons. In addition, learners will understand how releases can be made for each item and learn how other WebIQ modules affect purchasing functions.

Finite Scheduling

The following training session outlines Finite Scheduling in WebIQ, including understanding the data in each section of this module, adding and removing work orders, and learning how system parameters affect scheduling. In addition, you will discover other modules that influence the schedule and learn about other helpful features such as graphic schedule, Auto load, and Capacity calculations.

Bill of Manufacturing (BOM)

The following training session outlines the Setting up the Bills of Manufacture (BOM) in WebIQ, 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 to a BOM.

Transactions and Locations

The following training session is an outline of the Transactions and Locations module in WebIQ, including how to create & assign locations, define the different inventory statuses, how to set up auto disposition locations, demonstrate the add & transfer functions, and see the information in each location for a specific item number.

Inventory by Location

The following training session outlines the Inventory by Location module in WebIQ, including how to interpret the four sections found in the module and what is available in the Inventory by Location module. In addition, learn how to transfer parts from location to location and interpret the color codes to see the status of items in those locations.

Purchase Order History

This training session outlines WebIQ and the Purchase Order History Module, including how to use selection criteria, learning the difference between item and vendor data, and seeing how to logically organize data. In addition, understand how to export the Purchase Order History and learn about other module features.

Visual BOM Routing

This training session outlines Visual BOM Routing in WebIQ, including how to choose a BOM to view, understanding the color codes, and how to view the box details. In Addition, learners will understand the "Explode" BOM function for what-if scenarios and view right-click features.

Assembly Track

This training session outlines Assembly Track in WebIQ, including how to use assembly track, the differences between assembly & generic manufacturing, viewing the Work Order section's features, and the functionality of the process section. In addition, see the right-click features and options available in this module.

Work Orders

The following training session is an outline of the Work Orders in WebIQ, including how to create work orders, understand the main work order screen, and see how BOM information affects how work orders are created. In addition, recognize the difference between planned & manual work orders and see how "firming' work order can change its status.

Customer Status

This training session outlines WebIQ and the Customer Status Module, including how to use the status & Customer Legend Inquiry tabs, understanding the aging information presented and view how the Sales Analysis speed button operates. In addition, understand how to calculate a credit limit and learn how to change the data between invoice date and due date.

Vendor Maintenance

This training session outlines WebIQ and the Vendor Maintenance Module, including understanding the critical information held in the various tabs, learning where necessary accounting data is entered, and viewing where purchasing information is placed. In addition, users will see how this module operates in conjunction with other WebIQ modules, and users will review the options available in this module.

Vendor Status

This training session outlines WebIQ and the Vendor Status Module, including understanding the tabs found in this module, learning the key terms found on the Enterprise Aging Grid, and viewing the invoice detail columns on the Current Status tab. In addition, users will see how to find payment details against an invoice and see a demonstration of the PO Analysis Function.

Vendor RFQ

This training session outlines WebIQ and the Vendor RFQ Module, including viewing various RFQ sources, learning how templates are used, and learning about the key fields in the Vendor section. In addition, understand how to enter data in the pricing breaks section and view a demonstration of how to automatically apply accepted RFQ quantities and prices.

Inventory Availability

This training session outlines WebIQ and the Inventory Availability Module, including the difference between what inventory is available to promise & what inventory is capable to promise, what affects the ATP (available to promise) screen, and what menu options can be used in ATP data. In addition, learn the right-click features and interpret CTP constraints.

Purchase Order Requisitions

This training session outlines Purchase Order Requisitions in WebIQ, including the difference between PO's & PO requisitions, the purpose if the main module and how to approve a requisition. In addition, discover how security is set to interface with the requisition process.

Vendor RMA

This training session outlines WebIQ and the Vendor RMA Module, including the purpose of the module, the function of each of the speed buttons, the other modules affected by the Vendor RMA and see how to add items to the RMA. In addition, users will see a demonstration of how to disposition items in an RMA

Work Centers

This training session outlines Work Centers in WebIQ, including how work orders are scheduled on work centers and what other modules affect work centers in WebIQ. In addition, understand the importance of center types, learn which fields affect work order scheduling, and see how work centers become synced to RealTime.