

# **Role Based Learning Portfolio Catalog 2021**



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# Learning Experience for DELMIAWorks

## 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

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# 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 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**

## 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**

## CEO/CF0/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. **On Boarding Customer Basics for eLearning**

## 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**

## 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**



## 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

# 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

## 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

## 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

## 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

## 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

# 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..

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

Please contact [delmiaworks.elearning@3ds.com](mailto: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 Assessment (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

Production Engineer Overview

SolidWorks Import Tool

JobShop

Project Manager

Assembly Processes

BOM Assembly (ASSY 1 - 3)

Assembly / Complex Lines

Visual BOM Routing

RealTime Process Monitor

Quality Audit

Vendor RFQ

**Certification Exam**

# 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.

## 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.