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Contents

General

Basic Navigation

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

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

Onboarding Customer Basics for eLearning

This training session provides detailed instruction for first time eLearning users, including changing their password, accessing course documents, viewing the dashboard, editing their profile and how to filter by specific courses in the eLearning platform.
Topics included:

1. Changing the Default Password
2. Accessing the eLearning Documents
3. Filtering Courses
4. Editing the user Profile
5. Overview of the eLearning Dashboard

Smart Page

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

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 lesson, 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. Topics included:

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

System Parameters – List of Lists

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

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

What's New V16 – Non -Accounting

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

1. Added Security
2. The Inventory Module
3. Inventory Transactions and Locations
4. Labor and Overhead
5. Workflow

6. Forecasting
7. Sales and Distribution
8. View Dataset Information
9. RMA

What's New V16 – Accounting

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

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

What's New V16.2 – Non -Accounting

In this lesson, you'll be introduced to version 16.2 non-accounting functionality within Enterprise IQ. Topics included:
1. Bill of Material – Certified Employee Tab
2. RealTime – RealTime Inspection Frequency
3. Price Book Maintenance

What's New V16.2 – Accounting

In this lesson, you'll be introduced to version 16.2 accounting functionality within Enterprise IQ. Topics Included:
1. AP Invoice Updates
2. AR Invoice Updates
3. Terms Distribution – Configure Installments

What's New DW2020 – Non-Accounting

In this lesson, you'll be introduced to version DW2020 non-accounting functionality. Topics included:
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 DW2020 – Accounting

In this lesson, you'll be introduced to version DW2020 accounting functionality. Topics included:

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 DW2020x – Non-Accounting

In this lesson, you'll be introduced to version DW2020x non-accounting functionality. Topics included:

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 lesson, you'll be introduced to version DW2020x accounting functionality. Topics included:

1. Account Revaluation Options
2. Currency Translation Module

3. IACJ – Inventory Activity Cost Journal
4. WebIQ – Multi Currency Maintenance

Inventory Management

Inventory – Create a New Item

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

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

Inventory - Pricing Hierarchy

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

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

Inventory - AKA Buying Tab

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

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

Inventory - AKA Selling Tab

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

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

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

Inventory - Transactions and Locations

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

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

Inventory - Classes

In this lesson, 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. Topics included:

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

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

Bills of Material - Configuration

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

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

Bills of Material – ASSY Configuration

In this lesson, 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. Topics included:

1. Identify Types of Assembly (ASSY) MFG
2. Create a new ASSY1 or 2 Bill of Material
3. Identify & Utilize ASSY1 & 2 BOM Fields
4. Create an ASSY1 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 lesson, 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. Topics include:

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

Lot Number Tracking

In this lesson, you will learn how to configure lot tracking and how to utilize the Lot Number Tracking Module. Topics Include:

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

Serial Number Tracking

In this lesson, 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. Topics Include:

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

Production

Shop Calendar - Standard Labor Capacity

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

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 lesson, you will learn how to configure the Shop Calendar in DELMIAWORKS including how to schedule holidays, days off and shifts. Topics included:

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

WMSIQ

In this lesson, 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. Topics included:

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

IQRF

In this lesson, 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. Topics included:

1. Overview of IQRF, IQRF and Home Screens
2. Import a Scanner License File
3. Setup for IQRF Users – User Profiles

4. Search Menu Options in IQRF
5. Move Menu Options in IQRF
6. Receive Menu Options in IQRF
7. Ship Menu Options in IQRF
8. Disposition Menu Options in IQRF
9. Transactions Menu Options
10. Physical Inventory Menu Options in IQRF
11. Configure Print Labels Option
12. RealTime Menu Options

Finite Scheduling

In this lesson, 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. Topics included:
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 lesson, you will learn how to enable Floor Backflush for a work center. Topic included:
1. Configure a Work Center's Backflush Settings

Work Centers - Create

In this lesson, 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. Topics included:
1. Create a Work Center
2. Set MRO Exclusions for a Work Center
3. Utilize the Reject & Downtime Code tabs
4. Assign Cost Elements to a Work Center

Work Orders - Create

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

Assembly Track

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

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

RealTime Setup and Monitoring

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

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

RealTime Process Monitoring

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

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

Production Reporting

In this lesson, you will learn how to perform production reporting by shift, work order and by utilizing the Production Reporting Assistant. This lesson will also include steps to manually and automatically

disposition, backflush and reverse disposition items in inventory. Topics included:

1. Production Reporting Parameters by Shift
2. Production Reporting by Shift
3. Production Reporting Parameters by Work Order
4. Production Reporting by Work Order
5. Production Reporting Assistant

ShopData

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

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

JobShop

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

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 lesson, 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. Topics Included:

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 lesson, you will learn about the outsourcing processes available within DELMIAWORKS including Outsource Central and two manual outsource processes. Topics Included:

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

Project Manager

In this lesson, 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. Topics included:

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

Purchasing, Receiving & Returns

Purchase Order- Email

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

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

Purchase Orders – Create and Receive

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

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

Purchase Orders – Color Chips

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

1. Clone a Purchase Order

Purchase Orders – Approve w/ Workflow

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

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

Vendor RMA

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

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

Sales, Shipping & Returns

Sales Orders - Create

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

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

Sales Orders – Generate Releases

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

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

Customer RMA

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

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

Auto EForms in DELMIAWORKS

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

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 EForm Options
7. Print Auto EForm Reports

Capable to Promise

In this lesson, 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. Topics included:

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

Carrier Maintenance

In this lesson, 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. Topics included:

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

Pick Ticket Overview

In this lesson, 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. Topics included:

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

Bill of Lading (BOL)

In this lesson, 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. Topics included:

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

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

Packing Slip Overview

In this lesson, 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. Topics included:

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

Sales Quotations

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

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

MRP – Material Resource Planning

Daily Material Staging Requirements

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

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

Daily Parts Projection

In this lesson, 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 lesson, 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. Topics included:

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

Maintenance, Repair and Overhaul

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

1. Navigating to the MRO Module
2. Equipment and Classes
3. Create Equipment in MRO
4. Hierarchy of MRO Work
5. Create Skills
6. Create Checklists
7. Create Tasks
8. Create Templates

9. Assign Tasks to Equipment
10. Add a Template to Equipment
11. Total Unit Section
12. Creating Work Orders

Material Exception List

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

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

Rough Cut Capacity and Daily Projected Requirements

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

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

Whiteboard Capacity and Labor Whiteboard Capacity Planning

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

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

System Administration

Security Inspector – System Deny Role

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

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

IQAlert - Groups

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

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

IQAlert - Actions

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

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

Security Inspector – Create New Users

In this lesson, you will learn how to create a new user, how to configure a security profile for a new user and how to configure passwords. Topics included:

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

Security Inspector – Lower Tabs

In this lesson, 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. Topics included:

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

Troubleshooting 101

In this lesson, 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. Topics included:

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

Quality

CAR – Corrective Action Report

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

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

Document Library 1 – Creating a Document Library

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

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

Document Library 2 – Adding Documents

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

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

Document Library 3 – Workflow

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

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

Document Library 4 – Team Members

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

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

Quality Basics

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

1. Use Team Members in 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 lesson, you will learn how to create different ECO's, ECO Workflow Approval Templates and approving an ECO via Workflow. Topics included:

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

MRB – Material Review Board

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

1. Create an MRB – Two Methods
2. Create an MRB Workflow Approval Template
3. Associate an Item and Non-Conform Location

4. Associate a Customer or Vendor
5. Create a Repair Work Order for Labor/Materials
6. Associate a Failure Code
7. Close the Repair Work Order
8. Create a MFG Rework Order and BOM
9. Associate a Non-Conform Location to the WO
10. Production Report against the Rework WO
11. Approve the MRB via Workflow
12. MRB Options and Filters

Inspection Setup

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

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

Deviation

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

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

Gages and Devices

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

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

Quick Inspection

In this lesson, 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. Topics included:

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 Reports

Accounting

Vendor Maintenance

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

1. Vendor Maintenance
2. Access the Vendor Maintenance Module
3. Vendor Basic Information
4. Vendor Rating Tab
5. Vendor Freight Tab
6. Vendor Miscellaneous Tab
7. Vendor Forms/Reports Tab
8. Vendor EPlant Specific Settings
9. Vendor Remittance Tab
10. Vendor Contact Tab
11. Vendor User Field Tab
12. Vendor Documents Tab
13. Vendor Speed Buttons and Menus

Customer Maintenance - Credit Status Tab

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

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

Customer Maintenance

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

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

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

Customer Maintenance - Credit Data Tab

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

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

Finance Charges - Configure

In this lesson, 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. Topics included:
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

Accounts Receivable Invoice

In this lesson, you will learn about creating an AR Invoice, fields available in the AR Invoice Screen, moving an invoice to a GL Account, the Invoice Note option, available jump to functionality, using the cost source tool, available options and how to place an AR Invoice on hold. Topics included:
1. Access the AR Invoice Module
2. Understand General Fields
3. Associate Line Items to the Invoice
4. Access All Sales Accounts
5. Utilize an Invoice Note Field
6. Utilize Jump to Functionality
7. Access the Cost Source Tool
8. Utilize Invoice Speed Buttons
9. Access the Options Menu
10. Place an Invoice on Hold

Accounts Receivable - Processing

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

1. Create a New Invoice
2. Adding a Packing Slip to an Invoice

3.   Adding an Invoice Note
4.   Posting the Invoice

Account Type Maintenance

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

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

Bank Maintenance

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

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

Accounts Receivable – Auto Invoicing

In this lesson, 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. Topics included:

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

General Ledger – Create a Fiscal Year

In this lesson, you will learn how to setup a fiscal year. Topics included:

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

General Journal

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

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

Financial Reports

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

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

General Ledger - Account Structure

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

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

Cash Receipts

In this lesson, 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. Topics included:

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

Cash Disbursements

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

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

Fixed Assets

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

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

Accounts Payable Invoice

In this lesson, you will learn how to generate, post or void an AP Invoice, utilizing the Auto Invoicing option, generating a Quick AP Invoice and the basics of the AP Invoice screen. Topics Included:

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

Budgets

In this lesson, 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. Topics Included:

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

Chart of Accounts

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

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

Standard Costing - Setup

In this lesson, 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. Topics Included:

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 lesson, you will learn how to execute Standard Cost calculations in DELMIAWORKS for purchased and manufactured inventory items and covers available options and filters. Topics Included:

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

Posting Inventory Transactions (PIT) at Standard

In this lesson, 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.

Topics included:

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

Month End Closing Procedures-Periodic Inventory Method

In this lesson, 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.

Topics included:

1. An 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

Month End Closing Procedures-Perpetual Inventory Method for Standard Costing

In this lesson, 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.

Topics included:

1. An 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

IACJ – Inventory Activity Cost Journal

In this lesson you will learn about the IACJ module available in versions 16.0 and higher which is utilized to post transactions and their associated costing and GJ entries to the system. Topics included:
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

Human Resources

Time & Attendance

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

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

Payroll

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

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

Customer Relationship Manager-CRM

In this lesson 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. Topics included:

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

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 Code

Webinars

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 Eform.

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.

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.

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.