Web-Based Training

SunSystems Academy

Contents

For available courses, please see inserts at back

SunSystems Academy
Training to meet your needs

Whether you have just purchased SunSystems or are an existing user, your investment can be maximized if your workforce is well trained and using your system as productively as possible.

Motorola estimate that every $ spent on training translates into $30 productivity gains within 3 years.

Even after initial training, you need to keep your users' skills up to date. New starters join and people move to new roles, so the need for some form of training is ongoing.

Delivering flexible training

In response to a growing demand from both employers and employees, a global training program for SunSystems has been established – the **SunSystems Academy**.

Central to the Academy is **web-based training**, providing a flexible, cost-effective means for users to update their skills at a time and place to suit them. Training can be delivered to your workforce without the need for lengthy periods out of the office – and the associated expenses.

Training and more

The SunSystems Academy delivers more than just training courses…

It incorporates well-paced, easily accessible courses (for example, on SunSystems 4, SunSystems 5 and SunSystems Vision), delivered online and to a consistently high standard worldwide.

A "virtual tutor" or e-tutor can provide guidance on the training modules, providing a high level of expertise to users worldwide.

More informal support is provided by other members of the SunSystems Academy, using bulletin boards to exchange information and ideas.

In addition, users can test their knowledge and skills via an online assessment program – to gauge where they may need additional training, and also post-training, to gain a recognized **SunSystems accreditation.**

The accreditation scheme is for SunSystems users, to provide a formal validation of their competency.

Employers can be confident in the ability of their staff to operate their SunSystems implementation efficiently. And when recruiting new staff, an accreditation from SunSystems provides an independent and proven measure of their skills.

Why the training is web-based

Global standard

For the qualifications to be globally recognized and accepted by all SunSystems users around the world, a consistent level of training and testing must be maintained.

By delivering the training courses from a single source via the web, the same exacting standards can be achieved whenever, or wherever, the training is undertaken.

Likewise, the testing that leads to accreditation is administered centrally. The questions are compiled by a team of SunSystems experts and scoring is automated to ensure total objectivity.

Any qualifications awarded by the SunSystems Academy can therefore be accepted as a true and independent measure of that person's skill level.

Personal training plan

How many times have you been on a training course only to find that the majority of the course was not relevant? With the SunSystems Academy there is no need to search through vast amounts of training material to find what is required.

By taking a short multi-choice test, the system will devise a training plan for each individual, outlining specific modules that are needed to meet the training goals.

Personal learning style

Because the web-based training is broken down into small modules, training can be undertaken at the time of day, and for the length of time that suits each user's learning style and personal circumstances. The rate of learning can be increased or decreased depending on workload, and modules can be repeated as often as necessary.

This means that unlike traditional training courses, users can revisit material and can repeat infrequently used functions as a means of revision.

Research shows that this method of training is more effective than classroom-based training.

"Staff are trained more quickly and retention of knowledge is significantly higher" – KPMG

Training when it is needed

New staff or those moving to new roles do not usually start in convenient class-size numbers. With web-based training, there is no need to wait for the next scheduled training course, so your workforce can gain the necessary skills when you need them to.

Web-based training can be made available immediately, for any number of trainees. No longer will you have unproductive periods while waiting for new starters to be trained, and because of the progress testing, you can be sure that the training has been effective.

Training where it is needed

There is no need to travel to training centers, as web-based training is available from a desktop anywhere with Internet access. Whether users are in the office, or working from another office, they can continue with their training program. They can even continue the training at home!

Higher return on investment

Because of the increased efficiency and lower cost (travel, accommodation, expenses, opportunity cost) this method of training realizes a higher return on investment.

IBM realized a 2248% ROI from their Basic Blue e-learning initiative.

What does the training include?

Pre-training assessment

There are currently over 20 modules, with 160 lessons covering more than 600 topics, in the full SunSystems training catalogue, with ongoing additions. Time is precious, so to use it effectively, users need to identify the topics on which to concentrate.

By taking the short multi-choice test to identify knowledge gaps, users will be directed by the system to modules where their effort should be concentrated.

Training modules

Each training module begins by outlining what should be achieved from the lessons. It also indicates how long each lesson is expected to take and any pre-requisites.

The majority of topics are designed to take no more than 10 minutes to complete, allowing users to study a lesson in a spare moment, put aside more time to study several lessons, or return to a particular topic to reinforce their learning.

The lessons are interactive, requiring users to respond correctly before progressing. There is a facility to drill down to further levels of detail if required, or to summarize at the highest level if confident with a particular topic.

e-tutor

In a classroom you can ask questions of the tutor. With web-based training you can do the same by asking questions of an e-tutor or "virtual tutor". Questions are entered into the system which contacts the e-tutor via email. The e-tutor will then respond by email or by telephone, whichever is felt to be more appropriate.

Bulletin boards

With traditional training, there is the opportunity for interaction with fellow students, either in the classroom or at break times. This exchange of ideas is a valuable part of the learning process. As part of the SunSystems Academy, trainees can swap ideas and information via bulletin boards.

Check your progress

As users progress through the training, their learning can be tested, module by module, by taking a series of short multi-choice tests. This provides a simple, independent means of checking progress.

Accreditation

Once a user has completed their training, they can elect to take a final exam that will lead to the award from the SunSystems Academy.

A formal test can be requested at any time within six months of the initial registration. A password will be issued to give access to the "examination room". Once a user has entered this area, the on-line test must be completed within 30 minutes. The test will consist of a series of questions similar to those available to monitor progress. Once a user has completed the test, results will be sent by email.

If successful, the trainee will be issued with a certificate from the SunSystems Academy. If the required standard has not been met, the trainee will be advised which modules should be focused on and another attempt at the test will be allowed.

How to register with the Academy

You can register with the Academy by visiting our web site:
http://training.sunsystems.com

Enrollment is done on-line by entering personal details. A password will be returned by email.

The training can be sampled on the web site, free of charge, before taking the decision to enroll.

Bespoke training

While the SunSystems Academy delivers standard training programs, if you prefer, we can design a training program and accreditation scheme to your specifications.

For example, web-based modules that reflect the way you use SunSystems can be created for you.

The web training would reflect your configuration, Chart of Accounts, transaction types, forms, etc.

The aim of the lessons would be to train your users to carry out your business processes, transaction entry, month-end reporting, etc.

The exercises would be designed to test the proficiency of your users in the operation of your system.

We can set up and host a web site for your own use, to your design, or if you prefer, we can install the training system on your own web site or on your intranet.

For further information, please contact your nearest SunSystems office or SunSystems provider, or visit the SunSystems web site at: www.sunsystems.com

SunSystems Vision
Web-Based Training Modules

Overview

This course comprehensively covers the SunSystems Vision modules – Vision Executive, Vision XL and Vision Alert.

→ The introduction to Vision Executive deals with the broad concepts, and the advanced course explores all the more advanced features of Vision Executive, including hierarchies and custom/transaction drills.

→ The course also looks at all aspects of Vision XL, including the ability to send data to SunSystems and to extract balances and transactions.

→ The Vision Alert course covers the functionality and operation enabling users to schedule tasks, set up conditional processing and aspects of report distribution.

Pre-requisites

→ Familiarity working in a PC environment

→ PC with a screen resolution of 1024 x 768 and access to the web

→ A good working knowledge of SunSystems 4 Financials is essential

Suitable applicants

Those working in an accounts function, systems administrators, managers or accounts department managers.

Qualification

Successful completion of the assessment will lead to the award "Certified Vision User."

Topics

Vision Executive Beginners
Average time to complete: 1–2 hours

→ Introduction/basics
→ Designing a query
→ Extract, query and analyze data

Vision Executive Advanced
Average time to complete: 3–4 hours

→ Customize the default standard workbook
→ Forecasting and variance reporting
→ Currency revaluation
→ Locking cells, fixing cells and HTML
→ Vision dictionary
→ Hierarchies
→ Format tables
→ Custom/transaction drill

Vision XL
Average time to complete: 2–3 hours

→ Setup and overview
→ Extracting reference file data
→ Extracting transactional data and values
→ More XL utilities
→ Customizing Vision XL reports – Report Designer
→ Sending data to SunSystems

Vision Alert
Average time to complete: 1–2 hours

→ Introduction and setup
→ Vision Executive workbook alerts
→ Starting and connecting to server based Vision Alert
→ Vision Alert tasks
→ Advanced Vision Alert functionality
→ Other Vision Alert utilities

SunSystems Academy

SunSystems 4 Business
Web-Based Training Modules

Overview

This course covers the functionality and operation of the SunSystems 4 Business suite of modules – Sales Order Processing, Purchase Order Processing and Inventory Control.

→ This course will allow you to explore the Purchase Order lifecycle from initial commitment to receipt of goods and finally invoice matching, dealing with every process in between. You will also experience a sales transaction, from the initial quotation all the way through to the sales invoice.

→ Finally you will explore the stocktaking procedures and stock movements – this also includes the inquiry and reporting capabilities of this module that facilitate inventory control.

Pre-requisites

→ Familiarity working in a PC environment

→ PC with a screen resolution of 1024 x 768 and access to the web

→ A good working knowledge of SunSystems 4 Financials is essential

Suitable applicants

Those working in an accounts function, systems administrators or accounts department managers.

Qualification

Successful completion of the assessment will lead to the award "Certified SunSystems 4 Business User."

Topics

Purchase Order Processing
Average time to complete: 3–4 hours

→ Creation of files
→ Business definition
→ Calculation definitions
→ Calculation tables
→ Ledger interface
→ Purchase definitions
→ Line extension calculation
→ Names & addresses
→ Chart of Accounts
→ Address analysis
→ Item record
→ Item description
→ Item supplier
→ Purchase order entry
→ Printing the purchase order
→ Goods receipt matching
→ Invoice matching/approval
→ Under delivery of goods
→ Purchase invoice entry
→ Purchase inquiry
→ Item inquiry
→ Supplier inquiry
→ Purchase listing
→ Supplier listing
→ Invoice Register
→ Purchase order status

SunSystems 4 Business
Web-Based Training Modules

Sales Order Processing

Average time to complete: 4–5 hours

→ Overview
→ The sales order cycle
→ Creation of files
→ Entering the sales ordering/invoicing module
→ Business definition
→ Analysis in SunSystems Business
→ Chart of accounts
→ Names and addresses
→ Address analysis
→ System labels
→ Ledger interface
→ Item records
→ Item descriptions
→ Assembly structures
→ Calculation definitions
→ Calculation tables
→ Sales order definition
→ Header and detail presets
→ Pricing
→ Price books
→ Price book hierarchies
→ Unit conversion tables
→ Entering a sales order
→ Printing a sales order
→ Sales order stages
→ Sales inquiry
→ Customer inquiry
→ Customer listing
→ Order status

Inventory Control

Average time to complete: 4–5 hours

→ Overview
→ File create
→ Database definitions
→ Entering the Inventory Control module
→ Business definition
→ Movement value definition
→ Analysis in SunSystems Business
→ Item records
→ System labels
→ Item descriptions
→ Unit conversion tables
→ Location definition
→ Movement definitions
→ Movement presets
→ Ledger interface
→ Movement entry
→ Inventory allocation
→ Stocktake definition
→ Generate stocktake report
→ Physical stocktake
→ Stocktake entry
→ Stocktake clearance
→ Inventory inquiry
→ Movement inquiry
→ Stocktake inquiry
→ Movement analysis
→ Movement listing
→ Inventory listing
→ Inventory status
→ Inventory evaluation
→ Inventory usage
→ Inventory cover
→ Expired items
→ Stocktake listing
→ Stocktake valuation
→ Assembly structure list

SunSystems Academy

SunSystems 4 Financials
Web-Based Training Modules

Overview

This course covers the functionality and operation of the SunSystems 4 Financial modules – Ledger Accounting and Asset Register – and in addition, Budget Management and Process Manager.

→ For the Financial modules, this includes functionality such as the creation of the Chart of Accounts, setting up and disposal of assets, and the production of management reports.

→ The Budget Management course will allow the user to set up and use the software to manage their budgeting process.

→ Process Manager functionality is addressed through exploring potential uses of Business Rules, in order to build and maintain the processes in SunSystems. Examples use the SunSystems Financial modules to demonstrate relevant processes.

Pre-requisites

→ Familiarity working in a PC environment

→ PC with a screen resolution of 1024 x 768 and access to the web

Suitable applicants

Those working in an accounts function, systems administrators or accounts department managers.

Qualification

Successful completion of the assessment will lead to the award "Certified SunSystems 4 Financials User."

Topics

Ledger Accounting
Average time to complete: 8–10 hours

→ Overview
→ Logging on to SunSystems
→ Navigation
→ Setting up a new company
→ Setting up Chart of Accounts records
→ Setting up analysis
→ Printing and viewing reports
→ Security and operator permissions
→ Audit trails
→ Posting transactions to the ledger
→ Account inquiry
→ Account allocation
→ Aged analysis
→ Payments
→ Standard reports
→ Budgets
→ Changing databases
→ Balance file
→ Archiving data
→ Transferring static data
→ Rough book processing
→ Tax reporting
→ Multi-currency

Process Manager
Average time to complete: 4–5 hours

→ Overview
→ Rules engine
→ Lookup tables
→ Workspaces
→ Transfer Manager
→ Business menus
→ Reconciliation Manager

SunSystems Academy

SunSystems 4 Financials
Web-Based Training Modules

Asset Register
Average time to complete: 2–3 hours

→ Initial setup
→ Asset record details
→ Entering asset values
→ Analysis of assets
→ Depreciation
→ Inquiries and reports
→ Disposal of assets

Budget Management
Average time to complete: 2–3 hours

→ Creating templates and setup files
→ Starting Budget Management
→ Create budgets, budget groups and workbooks
→ Grid view, auditing, notes and linking XL formulae
→ The budget cycle
→ Modify budget display
→ User defined fields, filters and printing
→ Administering Budget Management

SunSystems 5 Financials User
Web-Based Training Modules

Overview

This course covers the functionality of SunSystems 5 Financials, enabling the user to carry out the day-to-day tasks of the accounts function.

→ The course gives a comprehensive overview of SunSystems 5 and introduces the user to the navigation tools that are available. The course then covers the setting up of standing data such as supplier accounts, payment terms, analysis codes. The setting up of currency codes and administration of the multi-currency function is also covered.

→ The course then instructs the user how to carry out transaction processing using the forms and transaction types built in to SunSystems 5. Common processes such as generating payments, budget maintenance and running standard reports are also covered.

→ Also included is a Budget Management course, which enables the user to set up and utilize the software to manage their budgeting process.

Pre-requisites

→ Familiarity working in a PC environment

→ PC with a screen resolution of 1024 x 768 and access to the web

Suitable applicants

Those working in an accounts function, systems administrators or accounts department managers.

Qualification

Successful completion of the assessment will lead to the award "Certified SunSystems 5 Financials User."

Topics

SunSystems 5 Overview
Average time to complete: 1 hour

Using SunSystems 5
Average time to complete: 1 hour

→ Logging into and out of the system
→ Navigation
→ Using forms

Multi-currency
Average time to complete: 1–2 hours

→ Introduction to Multi-currency
→ Currency codes setup
→ Daily rates setup
→ Period rates setup

Processes and Procedures
Average time to complete: 1–2 hours

→ Generating payments and debits
→ Maintaining budgets
→ Using Reconciliation Manager
→ Ledger revaluations

Standing Data Setup
Average time to complete: 1–2 hours

→ Chart of Account record setup
→ Customer setup
→ Suppliers setup
→ Names & addresses
→ Bank details
→ Payment terms setup – updating, run rules
→ Analysis code setup

SunSystems Academy

SunSystems 5 Financials User
Web-Based Training Modules

Transaction Entry

Average time to complete: 1–2 hours

➔ Entering transactions using journal entry grids

➔ Entering multi-currency transactions

➔ Using a combined journal

➔ Entering transactions with on-line allocation

Budget Management

Average time to complete: 2–3 hours

➔ Creating templates and setup files

➔ Starting Budget Management

➔ Create budgets, budget groups and workbooks

➔ Grid view, auditing, notes and linking XL formulae

➔ The budget cycle

➔ Modify budget display

➔ User defined fields, filters and printing

➔ Administering Budget Management

SunSystems Academy

SunSystems 5 Systems Administrator
Web-Based Training Modules

Overview

This course covers the systems administration functionality of SunSystems 5 Financials. After completion of this course the administrator will be able to carry out and fully utilize the user administration functions within SunSystems 5.

➜ The administrator will be able to create new accounts systems, the setting up an appropriate multi-currency model and associate analysis functions and budgets.

➜ A key area that is covered is the set-up of user forms with Form Designer, setting security rights and attaching forms to specific functions. Also account inquiries and drill association can be configured.

Pre-requisites

➜ Familiarity working in a PC environment

➜ PC with a screen resolution of 1024 x 768 and access to the web

➜ A good working knowledge of SunSystems 5 Financials is essential

Suitable applicants

Those working as systems administrators or accounts department managers.

Qualification

Successful completion of the assessment will lead to the award "Certified SunSystems 5 Systems Administrator."

Topics

System Set-up
Average time to complete: 2–3 hours

➜ Creating a new business unit
➜ Setting up a business unit
➜ Setting up a ledger
➜ Journal types
➜ Journal presets

Budget Set-up
Average time to complete: 1–2 hours

➜ Creating a budget ledger
➜ Defining a budget ledger
➜ Default budget ledger
➜ Budget checking
➜ Analysis codes

Form Designer
Average time to complete: 2–3 hours

➜ Creating and using forms
➜ Control buttons
➜ Linking to other functions
➜ Linking to other applications

Navigation Manager Editor
Average time to complete: 1 hour

➜ Creating folders
➜ Inserting functions
➜ Calling external applications

SunSystems Academy

SunSystems 5 Systems Administrator
Web-Based Training Modules

Multi-currency
Average time to complete: 2–3 hours

➜ GAAP model
➜ Euro model
➜ Split currency risk model

Global Analysis
Average time to complete: 1–2 hours

➜ Analysis dimensions
➜ Analysis structure
➜ Analysis codes

Inquiries
Average time to complete: 2–3 hours

➜ Creating a new filter
➜ Amending an existing filter
➜ Using drills
➜ Drill Association Designer