

# Infor ERP SyteLine

Version 8.01

*Classroom Training*

*Provided By*



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## **Syteline 101 – Workshop**

### **COURSE INTRODUCTION:**

Syteline 101 is a two-day intensive hands-on class intended to give the participant an overall picture of the Syteline system. The participant will start from an almost empty database and simulate an implementation of Syteline. The intent of the course is to see how information flows throughout the Syteline system. Detail of each module area is covered in the individual module classes.

### **COURSE GOALS:**

The participant will be able to enter master files; Customers, Items, Vendors, Work Centers, Bills of Manufacturing, Employees and System-Wide settings supporting the Syteline business process flow. They will enter a Customer Order, manufacture the item and process all the other pertinent data leading up to its shipment. The next step is to invoice that Customer Order and analyze financial data.

### **DURATION:**

An interactive, two-day seminar

## **Syteline User Interface and Navigation**

### **COURSE INTRODUCTION:**

Syteline groups navigation for data, process, and report forms by business function. Therefore, you'll minimize the time it takes for you to get your bearings, if you (1) identify the major functions covered in this course, and (2) identify which data, process, and report forms are grouped into that function.

### **COURSE GOALS:**

Before you take any other Syteline 7 class, you should take this one. In this class, you will learn how to:

- Find forms and switch between grid and form views
- Query, filter, & refresh data, including setting cap on data retrieved
- Add, update, and delete records
- Link from one form to another (add, details, find on fields; linking buttons; lists)
- Print collection and Export to Excel
- Attach notes
- When you're done, you will feel very comfortable moving around the product

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar.

## **Syteline Customer Order Entry**

### **COURSE INTRODUCTION:**

Customer Order Entry/Customer Service allows you to streamline the entire process of entering customers and orders into the system, checking the status of the order, shipping the finished goods, and invoicing the customer.

### **COURSE GOALS:**

- Become familiar with navigating through Customer Service
- Create and Maintain new customer records and all related items
- Search for data using Query by example
- Add Regular and Blanket Customer Orders
- Create Customer/Item Cross References
- Print Order Pick Lists
- Print Pre-Ship Packing Slips and Regular Packing Slips
- Perform Manual and Automatic Shipping Transactions
- Create and print Bills of Lading
- Become Familiar with Customer Service Tools
- Create Delivery orders manually and through order shipping

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar

# **Syteline Order Entry – Advanced Concepts and Usage**

## **COURSE INTRODUCTION:**

Customer Order Entry - Advanced Concepts/Usage expands on the streamlined Customer Order Entry/Customer Service class and includes more complex procedures and information on how to make corrections and adjustments to the initial customer order entry process.

## **COURSE GOALS:**

- Understand Inventory Planning forms that will help facilitate the Customer Service role
- Learn to add Customer Order Item Reservations
- Discuss the availability of lot number and serial number tracking and how they are utilized within Order Entry
- Set up an item using the Customer/Item Pricing hierarchy
- Learn how to properly set up the Sales tax system to collect data for taxed and non-taxed items
- Perform Advanced Shipping Transactions
- Learn the difference between Credit Memos and Price Adjustments
- Learn Syteline's two ways to create Progressive Bills
- Learn how to set up Commission structures and how to update commission due records
- Review Customer Service Reports and Utilities

## **PREREQUISITES:**

Syteline Order Entry

## **DURATION:**

An interactive, one-day seminar

## **Syteline Purchasing**

### **COURSE INTRODUCTION:**

Purchasing enables you to enter, receive and voucher purchase orders. This includes proper inventory planning and purchase requisitioning.

### **COURSE GOALS:**

- Add Vendors to the Vendors form
- Add a Vendor/Item Cross Reference
- Create a purchase order requisition and convert it to a purchase order
- Add a regular purchase order
- Add a blanket purchase order
- Create a change order against a purchase order
- Create a drop shipment of a purchase order line
- Process a receipt against a purchase order
- Create a voucher against a purchase order
- Process a return transaction against a purchase order line

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar

## **Syteline Inventory Control**

### **COURSE INTRODUCTION:**

Inventory Control improves your ability to set up and manage items. This course helps you analyze material supply and demand. Inventory Transactions will provide you with the understanding of all processes within Syteline that affect on hand balances for inventoried items.

### **COURSE GOALS:**

- Create and update Items
- View inventory levels
- Use lot tracking and serial number tracking
- Perform physical and cycle inventory transactions
- Perform miscellaneous inventory transactions
- Create, ship, and receive items on transfer orders

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar

## **Syteline Accounts Payable**

### **COURSE INTRODUCTION:**

Accounts Payable gives you the tools you need to compare vouchers against checks written for payment, monitor open items, make necessary adjustments against vouchers, and maintain detailed vendor information.

### **COURSE GOALS:**

- Adding new vendors, defining the various fields in the Vendor Maintenance and their impact to Purchasing and Accounts Payable
- Creating vouchers from purchasing and accounts payable
- Adding and posting vendor payments, outlining the different payment types
- Reconciling checks in the Bank Reconciliation file
- Setting up and utilizing Recurring Vouchers
- Applying utilities and periodic procedures
- Selecting reports for user analysis

### **PREREQUISITES:**

This class was developed with the assumption that you know the basics of accounting

### **DURATION:**

An interactive, one-day seminar

## **Syteline Accounts Receivable**

### **COURSE INTRODUCTION:**

Accounts Receivable gives you the tools you need to invoice, record checks received, create credit and debit memos, as well as maintain detailed customer information.

### **COURSE GOALS:**

- Invoicing from customer orders
- Invoicing from accounts receivable
- Consolidated invoicing
- Invoice posting
- Create customer payments
- Post customer payments
- Review AR posted transactions

### **DURATION:**

An interactive, one-day seminar

# **Syteline Production Planning and Control – Jobs**

## **COURSE INTRODUCTION:**

Production Planning/Control - Jobs incorporates everything you need for better shop performance and on-time deliveries to customers. Production Planning synchronizes the plant floor - from creating a job, posting material and labor transactions to completing a finished good.

## **COURSE GOALS:**

- Automatically create a job BOM
- Set up job defaults
- Manually create Job Orders
- Issue materials to jobs
- Enter and post job transactions
- Backflush job transactions
- Post finished goods to Inventory
- Describe the various tools Syteline offers for helping plan their work

## **PREREQUISITES:**

Inventory Course

BOM/ECN course

## **DURATION:**

An interactive, one-day seminar

# **Syteline Production Planning and Control – Repetitive Manufacturing**

## **COURSE INTRODUCTION:**

Production Planning/Control – Repetitive includes all that is necessary to better manage your repetitive manufacturing facility. This class teaches you how to use Syteline to manage the throughput of your cells and assembly lines. Starting with the necessary file setup and concluding with the recording of production, you will learn all that Syteline can do to increase your productivity, leaving you more time to manage your business and meet customer needs.

## **COURSE GOALS:**

- Set up the parameters required by Repetitive Manufacturing
- Maintain the Cell and Work center files
- Setup the criteria required for an item being produced with Repetitive manufacturing
- Copy and manipulate Routing and Bill of Materials
- Generate production schedules
- Update production schedules
- Dispatch production to cells
- Manage the supply of Floor Stock locations
- Record Production and Scrap against production schedules
- Record Just-In-Time Production
- Record Material, Labor, and Machine Time directly to the Work Center

## **PREREQUISITES:**

Inventory Course

BOM/ECN course

## **DURATION:**

An interactive, one-day seminar

## **Syteline Costing**

### **COURSE INTRODUCTION:**

Using a hands-on approach to evaluate Syteline Costing reports, Inventory reports, and General Ledger Reports, participants will learn how material cost flows through the system. Classroom exercises are performed that allow students to follow cost flows through purchased inventory, raw materials inventory, work in process inventory, work center inventory (repetitive manufacturing), and cost of goods inventory. By understanding Syteline's basic costing functionality, participants earn the ability to resolve most any costing issue.

### **COURSE GOALS:**

- Understand the different functionality of Standard and Actual Cost Types
- Learn how the different cost methods – Standard, Average, LIFO, FIFO and Specific, are used when Syteline creates inventory transactions
- Understand the maintenance requirements of a Syteline Standard Costing System
- Have the ability to research costing information by using Syteline Cost-related forms and reports
- Understand the costing transactions Syteline Purchasing processes create
- Understand how to setup costs on a Bill of Material for Current/Standard Operations and Current/Standard Materials
- Understand the costing transactions Syteline Job Shop Manufacturing processes create
- Understand the costing transactions Syteline Repetitive Manufacturing processes create
- Understand the costing transactions Syteline Customer Order processes create
- Understand the cost flows from Inventory setup:
  - Received purchased raw materials inventory
  - Issuing material to work in process
  - Receiving inventory into finished goods
  - Creating cost of goods inventory transactions when fulfilling shipments
- Understand how to read costing reports in Syteline and how they can be used in day-to-day business processes

### **PREREQUISITES:**

Inventory Control, Bill of Material/Engineering Change Notices, Production Planning/Control – Jobs and /or Repetitive

### **DURATION:**

An interactive, one-day seminar

## **Syteline General Ledger**

### **COURSE INTRODUCTION:**

General Ledger gives you the tools you need to store, retrieve, post, and analyze all financial aspects of your business.

### **COURSE GOALS:**

- Maintain the Chart of Accounts
- Create accounting periods, budgets, and user journals
- Enter normal, reversing, and recurring journal entries
- Post data from journals to general ledger
- Roll net income to retain earnings
- Print Financial Reports

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar

## **Syteline Financial Report Workshop**

### **COURSE INTRODUCTION:**

The Financial Reports Workshop gives you a hands-on opportunity to prepare financial statements.

### **COURSE GOALS:**

- Create different reports for different periods making use of the various output options
- Create financial reports with text fields utilizing keywords
- Create financial reports with variances and ratios for comparison reporting
- Create budgets for comparison with actual values for financial reporting
- Make use of the copy, generate, and resequencing activities to aid in report creation

### **PREREQUISITES:**

This class was developed with the assumption that you know the basics of accounting and financial analysis

### **DURATION:**

An interactive, one-day seminar

## **Syteline Material Requirements Planning (MRP)**

### **COURSE INTRODUCTION:**

MRP gives material or master planners a straightforward approach to planning material requirements based on customer orders, production orders and forecasts.

### **COURSE GOALS:**

- Introduction, Basic Item Fields for MRP, BOM and Lead Time Basics, Forecast and Customer Orders
- Generating and viewing MRP, Master Production Schedule, MRP Parameters
- Firming Planned Orders, Scheduling Planned and MPS Orders
- Set up an item for MRP
- Explain how item and parameter fields affect MRP
- Update low-level codes
- Create Forecast and MPS
- Explain planning detail view
- Identify shortage issues using exceptions
- Firm planned orders
- Schedule planned orders and MPS

### **PREREQUISITES:**

Inventory, BOM, Job Shop Manufacturing

### **DURATION:**

An interactive, one-day seminar

## **Syteline Estimating: Estimate Orders / Jobs**

### **COURSE INTRODUCTION:**

Syteline estimating is used to create quotes for customers. The estimating features will help in your effort to identify pricing and delivery times for existing and new items.

### **COURSE GOALS:**

- Estimate Order Overview
- Setup Review
- Estimate Orders
- Estimate Line Items
- Estimate Cost Detail
- Estimate Job Overview
- Setup Parameters
- Estimate Job Orders & Line Items
- Estimate Job BOM
- Operations
- Materials
- Estimate Job Scheduling

### **PREREQUISITES:**

BOM Setup, Job Orders

### **DURATION:**

An interactive, one-day seminar.

## **Syteline RMA Module**

### **COURSE INTRODUCTION:**

This class is designed to cover most of the basic topics someone who handles RMAs would need to know.

### **COURSE GOALS:**

When they have finished this class, students should be able to:

- Create and update orders using RMA's
- Print adjustment invoices
- Perform returns and shipping from RMA's
- Setup and execute the RMA process
- Become familiar with RMA parameters

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar.

## **Syteline Project Module**

### **COURSE INTRODUCTION:**

Syteline Projects is a cost management tool. SL - Project allows you to capitalize costs for large, time-consuming Projects or smaller, less time-consuming activities. The scope of a Project could range from Government Contracts to internal tracking of development and design expenses. Projects are made up of Project Tasks. Each task could be a necessary step to completing the entire Project. Furthermore, each Project Task can maintain a list of resources needed to perform the tasks.

Utilizing the Project structure, it is possible to assign planned costs and commitments by Project, Task and Resource. This gives the manufacturer the ability to manage project activities and costs. This includes the capability to track and manage material, labor, overhead and general and administrative overhead that occur at a higher level than a Job Order. Project has many interfaces within Syteline. Project interfaces with Estimating, Customer Order entry, Accounts Receivable, Payroll, Accounts Payable, Purchasing, Job Orders and Planning. Actual costs accumulated in these areas can be captured on the Project and Project Task. The Actual Cost accumulated on a Project can be compared to the Forecast Cost of the Project on the Percent of Completion forms. The Percent of Completion forms can be viewed at both the Project and Project Task level. Once actual costs are accumulated on a Project, you can manage and control these costs by supporting multiple user-defined Cost Codes and Project accounts for material, labor, other, overhead and G & A. Other cost/expense manipulation on a Project occurs during WIP Relief, Revenue Recognition and Invoicing directly from the Project.

### **COURSE GOALS:**

This course has been developed to teach you these topics:

- Set up parameters and files for proper Project functionality
- Creation of Estimate Projects, Estimate Project tasks AND Project resources
- Performing Estimate project cost manipulation
- Creating the Project, Project Tasks, and resources for which actual cost will accumulate
- Learn to analyze the percent of completion forms to view Actual Cost versus Forecast Cost
- Planning for Project Resources utilizing material requirements Planning
- Application of direct labor to the project and project tasks
- Issuing project resources to the project
- Linking a PO Requisition or PO directly to a project resource
- Receiving a purchased item directly to a project
- Cross-referencing a project resource to a Job order
- Capturing Job Order costs on the project
- Adding voucher costs directly to a project
- Performing project shipping
- Performing work in process relief
- Performing cost analysis at various levels of detail specified on the project using work breakdown structures

- Creating revenue milestones and recognizing revenue for a project
- Performing invoice milestones creation and posting

**PREREQUISITES:**

Jobs, Costing

**DURATION:**

An interactive, one-day seminar.

## **Syteline Bill of Material and Engineering Change Notices**

### **COURSE INTRODUCTION:**

Bill of Material/Engineering Change Notices allows the user to manage changes to a product's routing and component structure. With accurate bill of material information, material stockouts, incorrect material purchases, and rework for engineering changes can be avoided.

### **COURSE GOALS:**

- Create operation records, including outside operations
- Create material records, including alternate materials
- Copy BOM's
- Update BOM's using the engineering change notice (ECN) tools

### **PREREQUISITES:**

Inventory – Item Set Up

### **DURATION:**

An interactive, one-day seminar

# **Syteline Advanced Planning & Scheduling (APS) - Workshop**

## **COURSE INTRODUCTION:**

You must learn the prerequisite topics BEFORE class. This is an advanced class, and if you don't have the prerequisite background, you WILL become confused, lost, and fail to keep pace with the rest of the class

Come to class prepared to answer these questions:

- 1) What are the 5 phases that we've broken the demand life-cycle into?
- 2) What are the main business objectives of each phase?
- 3) What are the key tools used to meet the objectives of the first 4 phases?
- 4) What's the difference between ATP and CTP?

## **COURSE GOALS:**

In this class you will learn the tools Syteline provides to meet the planning and scheduling objectives of the five phases of a demand's life-cycle. When you finish, you'll be able to:

- Model your shop floor including resource and resource group requirements, shifts, overtime and downtime.
- Use these planning and scheduling tools: Get ATP/CTP, Plan on Save, all APS analysis forms (Demand Summary, Supply Usage, Resource Group Utilization, etc.), the Analyzer, the Material Planner Workbench, scheduling analysis forms, Resource Group Sequencing.
- Plan and schedule forecasts, master production schedules, customer orders, production orders, safety stock.
- Explain the purpose of most of the APS and scheduling fields and settings.
- For more information on the workshop, see the "SL8 Advanced Planning & Scheduling (APS) - Workshop" training guide.

## **PREREQUISITES:**

Syteline Inventory, BOM, and Job Shop or Repetitive Manufacturing

## **DURATION:**

An interactive, two-day seminar.

## **Syteline Multi-Site – Workshop**

### **COURSE INTRODUCTION:**

The Multi-site workshop is a course designed to provide participants with the knowledge of a multi-site structure and why to choose it. Special emphasis will be placed upon the Replication Logic now found in Syteline 8 Multi-site. The technology behind the functionality has significantly changed between Syteline 6 and Syteline 8 and therefore much of the learning/discussion will be aimed at understanding this new environment. Below is the material that we will cover (of course with a special emphasis upon Syteline 8's Replication Architecture).

### **COURSE GOALS:**

- Learning the differences between an Entity and a Site database
- Establishing the Entity/Site hierarchy
- Defining General Ledger accounts
- Items, Vendors & Customers in a Multi-site environment
- The concepts of Centralized Order Entry, Multi-site Moves, Transfer Orders, Payments and Ledger Consolidation are discussed and practiced.

### **PREREQUISITES:**

SyteLine101, Costing, General Ledger

### **DURATION:**

An interactive, one-day seminar.

# **Syteline Crystal Reports: Introductory Overview**

## **COURSE INTRODUCTION:**

This course is an introduction to the Crystal Reports capabilities native to the Syteline 8 system

This class is designed to cover most of the basic topics someone who modifies existing Syteline reports or who creates new reports from scratch needs to now.

## **COURSE GOALS:**

- Identify the elements of the Crystal Reports Interface
- Create a new report
- Format Objects
- Insert and edit text boxes
- Open and use the Select Expert
- Define criteria for record selection
- Apply record selection to date fields
- Sort report records
- Group records in meaningful sequences
- Modify groups
- Summarize and subtotal information
- Create grand totals
- Apply special formatting to objects
- Use special Crystal reports fields
- Add lines and boxes
- Insert pictures
- Import elements into a text box
- Format individual elements of a text object
- Use basic formulas in Crystal reports
- Use running totals

## **PREREQUISITES:**

None

## **DURATION:**

An interactive, one-day seminar.

## **Syteline Forms Personalization: Introductory Overview**

### **COURSE INTRODUCTION:**

This course is an introduction to the Forms Personalization capabilities native to the Syteline 8 system.

### **COURSE GOALS:**

- Explain the architecture in detail
- Work with the four most basic components
- Describe the function and role of the IDO's
- Work with Property Class Extensions
- Add inline lists
- Add components to a form
- Add and create validator
- Copy a form
- Create a new form from scratch or an IDO Data Source
- Cut and Paste fields from one tab to another
- Describe the function of the strings table

### **PREREQUISITES:**

None

### **DURATION:**

An interactive, one-day seminar.

# **Syteline System Administration Overview**

## **COURSE INTRODUCTION:**

This course gives participants the administration tools needed to create, maintain and use the Syteline database. Security, index rebuilding, database monitoring, changing parameters, looking at startup options and performance tuning are all presented. The functionality discussed is designed to make daily user activities easier and more efficient.

## **COURSE GOALS:**

After successfully completing the System Administration (SAO) course, you should be able to:

- Add a new Syteline Database
- Backup/Restore a Syteline database
- Establish a multi site replication environment
- Perform basic tasks in SQL server's Enterprise Management and Query Analyzer
- Describe the Syteline Framework
- View the Next Keys and Unlock Functions and Journals
- Create a Syteline configuration
- Add and update Audit Trails
- Effectively monitor and create background tasks
- Add a UET to the system

## **DURATION:**

An interactive, one-day seminar

## **Syteline Developer's Workshop**

### **COURSE INTRODUCTION:**

The target Audience for this class is programming/administrative professionals who will be responsible for managing, planning and developing custom forms and custom code alterations for Syteline.

### **COURSE GOALS:**

This class will introduce the topics encapsulated within the Syteline development toolset. Topics introduced will include forms creation, IDO creation and SQL table creation to extend the Syteline Database. You will learn about Global and Form Objects, Property Class and Property Class Extensions, the creation of Properties and how the inheritance model governs these entities. In addition, you will take away the necessary understanding of our architecture in both a run time and development environment.

### **PREREQUISITES:**

Forms Personalization; User Interface

### **DURATION:**

An interactive, one-day seminar.