

# Global Software Training Courses and Guidelines

---

## Why

Education plays a vital role in ensuring that you are able to implement and use our financial solutions as quickly and as easily as possible. We know that customers are constantly examining skill levels to determine immediate and future needs. We also know that cost pressures are higher than ever. That's why we continually enhance both the quality of our courses and the scope of the curricula. We offer high quality, cost-effective training that emphasizes practical methods for using our software.

## Where

### Course Locations

Raleigh Corporate Office  
3021 Beechleaf Court  
Suite 170  
Raleigh, NC 27604 (USA)

West Coast Headquarters  
22522 29th Drive, SE  
Building L-2  
Bothell, WA 98011 (USA)

### Group On-site and Group Internet-Based Training

Global offers the convenience of training at your site. Our trainers will come to you and present course material in a way that suites your company's needs. We also offer WebEx training for approved courses only. Please click on the following link to view our **CPE Training Guidelines**. You can request training by completing the **Training Request Form** that can be found at the following link. <http://www.globalsoftwareinc.com/training-request-form>

Contact Jackie Hood at 1-800-849-7500 at extension 5417 for assistance or questions.

Copyright © 2016, Global Software, Inc.  
3201 Beechleaf Court, Suite 170  
Raleigh, North Carolina 27604  
Support: 800.849.7500 Fax: +1.919.976.8205

---

## What

### **Course Size**

Courses are limited to 10 participants.

### **Course Times**

All courses are held from 9:00 AM until 4:00 PM.

### **Delivery Mode**

All courses are delivered in a live mode whether on-site or internet-based, however, the internet-based courses are not CPE Certified at this time.

### **Course Length**

Global education courses range from one to four days in length.

### **Registration**

Register for classes by filling out the Application for Enrollment at the back of this book. You can also register on line at [www.globalsoftwareinc.com](http://www.globalsoftwareinc.com).

### **Advanced Preparation:**

Each attendee should come to class with PC or Laptop.

### **Cancellation and Reschedule Policy for On-site Training**

If you cancel, the following fees apply:

- Cancellation and/or reschedule requests must be received in writing via e-mail or fax.
- Notifications should be sent to [becky.kaufman@globalsoftwareinc.com](mailto:becky.kaufman@globalsoftwareinc.com) with your Sales/Customer Care Representative copied or faxed to 919.876.8205.
- You are responsible for ensuring that Global Software, Inc. receives the written request. Global Software, Inc. will reply with a written acknowledgement.
- Rescheduling an on-site class is permitted as long as the request to reschedule is received more than two weeks in advance.
- If you reschedule with less than two weeks advance notice, a fee of 25% of the total training cost will be charged because Global Software, Inc. reserves the dates you schedule for your personal use thereby preventing us from scheduling classes for other customers on those date(s), rescheduling is allowed but will fall under the same cancellation policies.
- If there is a need to cancel training when one of Global Software Inc.'s employees is on-site, you must contact Becky Kaufman at 919.865.5413 or by e-mail at [becky.kaufman@globalsoftwareinc.com](mailto:becky.kaufman@globalsoftwareinc.com). You should include your Sales/Customer Care Representative in all e-mail correspondence.
- Any costs incurred as part of scheduling travel will be billed to you. This includes but is not limited to airfare change fees and price differences.
- If Global Software, Inc. cancels the on-site training due to weather or unforeseen circumstances beyond the control of Global Software, Inc. there are no fees charged and we will reschedule at your convenience, based upon availability.
- Global Software reserves the right to cancel any class that has insufficient enrollment. Participants would be notified one week prior to class.

---

# Accounts Payable Basic Applications Course - (APA-101)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

- iSeries (AS/400) applications - none
- SS and QD - basic Excel knowledge

## Course Description

This two-day on-site course covers the functionality of the Accounts Payable and Cash Management applications. Participants will leave class with the skills necessary to use this product effectively on a day-to-day basis.

## Course Outline

- Work with database system values
- Create important AP objects, such as charge types and discount terms
- Have knowledge of vendor management and invoice processing
- Create payment runs and quick payments
- Enter voids, unused checks, other bank transactions
- Understand standard reports

Duration	2 days
Participants	10
CPE Units	14
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Accounts Receivable Basic Applications Course - (ARA-101)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

Basic knowledge of an accounts receivable application.

## Course Description

This three-day on-site course covers the functionality of the Accounts Receivable application. Participants will leave class with the skills necessary to use this product effectively on a day-to-day basis.

## Course Outline

- Understand the decisions made when initializing the database
- Work with customers and aging profiles
- Apply receipts against open invoices
- Generate collection action items
- Issue statements and letters
- Understand standard reports
- Use on-line inquiry tools

Duration	3 days
Participants	10
CPE Units	21
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# General Ledger Basic Applications Course - (GLA-101)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

Basic knowledge of general accounting processes and terminology.

## Course Description

This three-day on-site course provides you with a knowledge of the functionality of the Global Software General Ledger system. You will have a hands-on opportunity to work with the General Ledger in a predefined, generic setting, allowing you to focus on making efficient and effective use of the General Ledger.

## Course Outline

- General Ledger navigation and administrative essentials
- Account management and journal entry processing
- Utilize basic report writing tools and execute various system reports
- Define summary accounts and understand tools used to maintain
- Work with data management tools including allocations and import account data
- Perform period and year-end processing

Duration	3 days
Participants	10
CPE Units	21
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Spreadsheet Server for GL Training Course - (SS-101)

## Who Should Attend

Accounting staff to include:

- CFO
- Controller
- Accounting Manager
- Staff Accountant
- Treasurer

## Prerequisites

- Intermediate Excel Skills
- Knowledge of companies Chart of Accounts

## Course Description

A one-day financial on-site or internet-based course to educate attendees on the Excel based formulas and functionality of Spreadsheet Server in order to build financial based reports from the General Ledger.

## Course Outline

1. Introduction
  - Evaluation Forms, Roster and CEU Credit Forms
  - Spreadsheet Server Overview
  - Excel Setup
  - User Settings
2. Building Spreadsheets
  - Build a Template
  - Formula Assistant
  - GXL Formula
    - Wildcards and Ranges
    - Value Lists
    - Segment Lists
  - GXD Formula
  - GXE Formula
3. Workshop
  - Converting existing financial worksheets using Spreadsheet Server formula and/or develop new spreadsheets.
4. Distribution Manager
  - Create distributions to directly distribute financial worksheet/workbooks to users via e-mail or file save.

Duration	1 day
Participants	10
CPE Units	7
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Spreadsheet Writeback Training Course (SS-102)

## Who Should Attend

Accounting staff responsible for loading data to ERP.

## Prerequisites

- Intermediate Excel Skills
- Knowledge of companies file structures

## Course Description

A one-day financial on-site or internet-based course designed to upload data from Excel directly into file structure.

## Course Outline

- Features and Benefits
- Establishing Connections
- Build a Template
- Writebacks

Duration	1 day
Participants	10
CPE Units	7
Course Level	Intermediate
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Spreadsheet Server for GL & Query Design Course (SSA-201)

## Who Should Attend

Accounting staff to include:

- CFO
- Controller
- Accounting Manager
- Staff Accountant
- Treasurer

## Prerequisites

- Intermediate Excel Skills
- Knowledge of companies Chart of Accounts
- Knowledge of companies file structures
- Helps to have SQL knowledge

## Course Description

A three-day on-site course that covers the layout and functionality of the Query Designer and Excel based formulas. After taking this course the user should be able to design a report format in Excel, then develop the necessary queries to populate that report using Spreadsheet Server formulas.

## Course Outline

1. Introduction
  - Evaluation Forms, Roster and CEU Credit Forms
  - Spreadsheet Server Overview
  - Excel Setup
  - User Settings
2. Building Queries
  - Query Designer Layout
  - Database Connections
  - Query Building
3. Building Spreadsheets
  - Build a Template
  - Formula Assistant
  - GEXD Formula
    - Wildcards and Ranges
    - Value Lists
    - Segment Lists
  - GEXQ Formula
  - GEXS Formula
  - GEXI Formula

Duration	3 days
Participants	10
CPE Units	21
Course Level	Intermediate
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Budget Accelerator User Training Course - (BA 101)

## Who Should Attend

Accounting staff responsible for budgeting to include:

- CFO
- Controller
- Accounting Manager
- Staff Accountant
- Treasurer

## Prerequisites

- Intermediate Excel Skills
- Knowledge of companies Chart of Accounts
- Knowledge of companies budgeting process

## Course Description

A one-day financial on-site course to educate attendees on the Enterprise Budgeting Excel formulas to perform functions task such as budget spreads and writebacks. Also includes using Excel formulas to report on the budgets written.

## Course Outline

- Features and Benefits
- Budget Spreads
- Writebacks
- Budget Reporting via Excel

Duration	1 day
Participants	12
CPE Units	7
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Budget Accelerator Administrator Training Course (BA 102)

## Who Should Attend

Accounting staff responsible for budgeting to include:

- CFO
- Controller
- Accounting Manager
- Staff Accountant
- Treasurer

## Prerequisites

- Intermediate Excel Skills
- Knowledge of companies Chart of Accounts
- Knowledge of companies budgeting process and methodology

## Course Description

A four-day financial on-site course to educate finance attendees on the features and functionality of the Enterprise Budgeting application. Upon completion of the course, trainees will be able to create and distribute Excel-based budget models, as well as, track, consolidate and review the budget data for the entire organization. The course will also draw on the capabilities of other Global products for certain advanced tasks, including Spreadsheet Server and Query Designer.

## Course Outline

1. Brief overview of product functionality.
  - Demonstrate formulas: GXLEB, GXLB, GXCEB, ACCTDESC, etc.
  - Template Wizard
  - Formula Wizard
  - Drill Down
  - Discussion of Budget Methodology, Guidelines & Approaches
2. Hands-on exercises
  - Entering Budget Data
  - Performing a Budget Writeback – Budget Submit
  - Entering Budget Data via Spread Methods
  - Inserting/Removing New Summary Budget Items
  - Inserting/Removing Budget Detail Items
  - Creating a New Budget Environment
  - Initializing a Budget Model
  - Creating a Writeback Definition
  - Creating a Custom Writeback Definition
  - Creating a Spread Definition
  - Creating a Summary Insert Row Definition
  - Creating a Detail Insert Row Definition
  - Initializing a Distribution Setup
  - Distributing a Budget Model
  - Setting up Rules for Writeback and Tracking

- 
3. Other Features - Overview and hands-on
- Creating Budget Versions & Revisions
  - Configure E-mail Settings
  - Maintain/Load Custom Tables
  - Define User Settings/Functionalities

Duration	4 days
Participants	10
CPE Units	28
Course Level	Intermediate to Advanced
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Global Security & Executive Workshop - (EXA-101)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

Basic knowledge of AS/400-based security, the operating environment, and General Ledger processing requirements.

## Course Description

This on-site workshop provides hands-on experience applying security within Global applications and using the Global Executive.

## Course Outline

- Evaluate security requirements
- Develop a security plan
- Apply security classes
- Work with AS/400 user profiles, user enrollments, and operating parameters
- Create user-defined functions, menus, and action bars
- Develop job streams

Duration	1 day
Participants	10
CPE Units	7
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Fixed Assets Basic Applications Course - (FAA-101)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

Basic knowledge of fixed assets processes.

## Course Description

This three-day on-site course provides participants with the opportunity to work with the Fixed Assets application.

## Course Outline

- Set up system values
- Perform asset and depreciation maintenance
- Understand reports and inquiry features
- Interfacing with GL
- Report Writer
- Security

Duration	3 days
Participants	10
CPE Units	21
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Project Accounting Management Basic Applications Course (FAA-201)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

Basic knowledge of project accounting management processes.

## Course Description

This two-day on-site course provides participants with the opportunity to work with the Project Accounting Management application.

## COURSE OUTLINE

Work with database system values

- Establish posting structures
- Create projects
- Interface projects from Accounts Payable
- Interfacing with FAMS
- Project maintenance
- Transaction maintenance
- Inquiry and reporting
- Report Writer
- Security

Duration	2 days
Participants	10
CPE Units	14
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

---

# General Ledger Classic Basic Online Workshop - (GLC-101)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application.

## Prerequisites

None.

## Course Description

This two-day on-site workshop explains the basic skills necessary to perform daily GL tasks. Focus is on setting up and maintaining the ledger on the host system.

## Course Outline

- Security Processing
- Control File
- General Ledger Master File
- Journal Processing
- Interactive Post
- Trial Balance
- Transaction analyzer
- Period Closing – monthly and year end
- Control Records

Duration	2 days
Participants	10
CPE Units	14
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

---

# General Ledger Classic Report Writing Workshop - (GLC-201)

## Who Should Attend

Any person in the accounting, financial, or information technology areas, that will either be using the application or supporting the application..

## Prerequisites

General Ledger Basic Online Workshop (GLC-101) and basic skills in maintaining the ledger.

## Course Description

This two-day on-site workshop provides the skills necessary to report on financial data within the General Ledger System. Participants will create conventional and matrix reports as well as cost allocations.

## Course Outline

- Responsibility Reporting
- Report Descriptions
- Report Distribution
- Conventional report maintenance
- Matrix report maintenance
- Online Inquiry and Audit Report
- Account Summary Specifications
- Cost Allocation maintenance
- Control Records

Duration	2 days
Participants	10
CPE Units	14
Course Level	Intermediate
Field of Study	Specialized Knowledge and Applications

---

# General Ledger Classic System Technical Workshop (GLC-301)

## Who Should Attend

Programmers, analysts, operators, or data processing managers responsible for the General Ledger System. Accounting personnel can also gain a better knowledge of how the system works on different platforms.

## Prerequisites

None.

## Course Description

This one-day on-site workshop reviews the technical aspects of the General Ledger System.

## Course Outline

- Installation Overview
- Dataset Review
- Jobstream flow
- Job Control Language (JCL)
- Dataset Contention
- Customer Run Sheet (if provided by customer site)

Duration	1 day
Participants	10
CPE Units	7
Course Level	Advanced
Field of Study	Specialized Knowledge and Applications

---

# Harmonix Journals and Budgeting Workshop - (GLC-111)

## Who Should Attend

Staff responsible for maintaining the General Ledger System through the Harmonix processing feature.

## Prerequisites

General Ledger Basic Online Workshop (GLC-101) and basic skills in maintaining the ledger.

## Course Description

This one-day on-site workshop focuses on journal processing and budgeting utilizing the Windows-based Harmonix Journals and Budget features of the General Ledger System.

## Course Outline

### *Journals*

- System communication
- Journal Defaults
- Utility Functions
- Special Features
- Sharing Files
- Export to Excel/Lotus
- Import from Excel/Lotus

### *Budgeting*

- Establishing Account Ranges
- Defaults
- Download into Excel/Lotus
- Maintaining Spreadsheet
- Upload to Mainframe

Duration	1 day
Participants	10
CPE Units	7
Course Level	Intermediate
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Harmonix Report Writer/Spreadsheet Workshop - (GLC-211)

## Who Should Attend

Accounting staff responsible for financial reporting.

## Prerequisites

General Ledger Report Writer Workshop (GLC-201) and basic general ledger report writing knowledge.

## Course Description

This one-day on-site workshop is divided into two halves. Part one focuses on creating and maintaining GL reports through the Windows-based Harmonix Report Writer. Part two defines the relationships between the account summary information in GL report and the columns and rows in the user-defined spreadsheet to download from the mainframe.

## Course Outline

### *Report Writer*

- Conventional Reports
- Matrix Reports
- Grid Features
- Account Selection

### *Spreadsheet*

- Spreadsheet Template (rows and columns)
- Download into Excel/Lotus

Duration	1 day
Participants	10
CPE Units	7
Course Level	Intermediate
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

## Fixed Assets Classic Workshop - (FAC-101)

### Who Should Attend

New employees and staff responsible for periodic updating and reporting, implementing or maintaining the system, and cost recovery, tax credits, and disposition.

### Prerequisites

None.

### Course Description

This three-day on-site workshop covers all aspects of the Fixed Assets System. Participants will study the use and operation of specific system features.

### Course Outline

- Information Flow within the System
- Online Screen Activity
- System Tables
- Asset Maintenance
- Online Screen to Batch Transactions
- Reporting within FAS
- General Ledger Reporting
- Conversion Considerations
- System Flow

Duration	3 days
Participants	10
CPE Units	21
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

---

# Global Link Training - (GLL-101)

## Who Should Attend

New or experienced staff who have a need to transfer data between the mainframe and their PC/Network.

## Prerequisites

None.

## COURSE DESCRIPTION

This one-day on-site workshop goes into the mainframe and PC operations of Global Link for system administrators to define the transfer profiles and for users to initiate the transfer.

## Course Outline

- Installation of Global Link
- Mainframe
- PC/Network
- Mainframe Administration
- Profile
- PC ID Maintenance
- Library Support
- Mainframe Administration
- Attended File Transfers
- User Profiles
- Spreadsheet Files
- Unattended File Transfers

Duration	1 day
Participants	10
CPE Units	7
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Global View End User Training - (GLV-101)

## Who Should Attend

Staff who monitor business activity and need a flexible report writer.

## Prerequisites

None.

## Course Description

This two-day on-site workshop teaches how to define online inquiries and prepare reports using Global View. Participants will leave class with the knowledge of how to access data in GL, AP, FAS and HMMS databases.

## COURSE OUTLINE

- Quick Query
- Access Databases
- Set Up Query for Online or Print Display
- Selection Criteria
- Run Time Selection Prompts
- Reports Generation
- Report Definition
- Report Formatting
- Defining Statistics
- Override System Defaults
- Multi-line Reports
- Expressions
- Heading Formats

Duration	2 days
Participants	10
CPE Units	14
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Global View Advanced User Training - (GLV-201)

## Who Should Attend

Staff who use global View and need a more sophisticated method of controlling their output.

## Prerequisites

Global View End User Training (GLV-101).

## Course Description

This two-day on-site workshop provides reporting techniques available through report definition. Emphasis is on using expressions for calculations, conditional testing, and functions, as well as using the report format options to enhance the visual display of reports.

## Course Outline

- Variance Calculations
- Calculating Percentages
- Aging Dates
- Conditional Testing
- Complex Selection Criteria
- Functions
- Report Format Options
- Column Headings and Picture Display
- Column Layout
- Sort Headings/Trailers
- Cross Column Heading
- Detail Line Formatting
- Personal Format Options
- Printing Labels from Global View
- System Administration

Duration	2 days
Participants	10
CPE Units	14
Course Level	Advanced
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Global View System Administration/Technical Training - (GLV-301)

## Who Should Attend

Staff who perform system administrator duties or data processing managers responsible for Global View.

## Prerequisites

None.

## Course Description

In this two-day on-site workshop, participants will work with files, subjects, userviews, data definitions, defaults, and security. Participants will leave class with the knowledge of the technical aspects about Global View and how to install, maintain, and operate the system.

## Course Outline

- Standard Report Definition
- System Monitor
- Data Dictionary
- Column Heading and Pictures
- Logical Data Definition
- Expression Definition
- Report Heading/Format
- Function Definition
- MVS and VSE Installation
- Online Communication
- Tailor Batch JCL
- Define Installation and Transaction Defaults
- JCL Editor
- Establish User Security

Duration	2 days
Participants	10
CPE Units	14
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Accounts Payable Classic Basic Online Workshop (APC-101)

## Who Should Attend

New or experienced staff who use the Accounts Payable application for inquiry and entry of vendor and voucher data.

## Prerequisites

None.

## Course Description

This three-day on-site workshop teaches online and batch Accounts Payable system functions. Participants will enter vendor and voucher data, and use the system's online inquiries to retrieve specific information. Participants will also generate and review reports.

## Course Outline

- \* Vendor Data Entry and Maintenance
- \* Vouchers – Standard, Prepaid, Travel Advance, Contract/Repeat, Batch Control
- \* Options
- \* System Flow and Programs
- \* Reporting
- \* Online Procedures and Flow

Duration	3 days
Participants	10
CPE Units	21
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

---

# Accounts Payable Classic Advanced Workshop - (APC-111)

## Who Should Attend

Experienced staff responsible for control of the Accounts Payable system.

## Prerequisites

Accounts Payable Basic Online Workshop (APC-101).

## Course Description

This two-day workshop explains system controls, options, and how to maximize the system. Participants will use reports to verify accounts payable activity and balancing procedures.

## Course Outline

- Vendor / Voucher Review
- System Controls / Options
- Daily and Monthly Balancing Procedures
- Reporting and Verification
- System Flow and Programs

Duration	2 days
Participants	10
CPE Units	14
Course Level	Advanced
Field of Study	Specialized Knowledge and Applications

---

# Accounts Payable Classic 1099 Workshop - (APC-112)

## Who Should Attend

Experienced staff responsible for control, reporting and production of 1099-MISC forms and files from the AP system.

## Prerequisites

Accounts Payable Advanced Workshop (APC-111).

## Course Description

This one-day on-site workshop is designed to review the current year's changes for 1099-MISC reporting. Participants will leave class with the knowledge of tools necessary for effective 1099 tracking, reporting and production. Emphasis will be on 1099 mass maintenance and overrides for the actual production of forms.

## Course Outline

- Current IRS Requirements
- Vendor Review / Maintenance / Tracking
- 1099 Reporting
- 1099 Jobstreams
- Overrides Batch Cardins
- 1099 Forms Production

Duration	1 day
Participants	10
CPE Units	7
Course Level	Intermediate
Field of Study	Specialized Knowledge and Applications

---

# Accounts Payable Classic System Technical Workshop (APC-301)

## Who Should Attend

New staff responsible for system installation and daily job execution.

## Prerequisites

None.

## Course Description

This one-day on-site workshop reviews system installation and maintenance procedures, as well as the technical aspects of the Accounts Payable system. Participants will review commonly used job streams and restore procedures.

## Course Outline

- Installation Members INSTRUCT, MAINTINS, MEMMAST, MDLMAST
- Daily Batch Processing
- Edit/Report Production
- Online File Backup/Restore
- File Rebuild
- Naming Conventions
- Master Files – Record Layout and Dependence
- Interaction with Other Systems

Duration	1 day
Participants	10
CPE Units	7
Course Level	Advanced
Field of Study	Specialized Knowledge and Applications

---

# Hospital Purchase Order Processing Workshop - (HMC-101)

## Who Should Attend

New staff and first time users of the system.

## Prerequisites

None.

## Course Description

This two-day on-site workshop handles the internal workings of HMMS Purchase Order Processing. We cover a variety of topics, ranging from system setup options to receiving and reporting.

## Course Outline

- Purchase Order Entry and Maintenance
- Receiving
- Purchase Order Inquiry
- Reporting
- Buyer Maintenance
- Purchasing Policies
- Exception Review
- Invoice Matching Vendor Processing
- Overview of Inventory Processing

Duration	4 days
Participants	10
CPE Units	28
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Hospital Inventory Control/Requisition Processing Workshop (HMC-201)

## Who Should Attend

Inventory and Purchasing users.

## Prerequisites

A basic knowledge of data entry.

## Course Description

This two-day on-site workshop teaches the basic areas of the inventory module. Participants will leave class with the knowledge of how to gather information from the inventory module.

## Course Outline

- Inventory Maintenance
- Physical Inventory
- Distribution Processing
- Inquiry Features
- Usage Analysis
- Report Review
- Kit/Tray Processing
- Case Cart Processing
- Requisition Processing
- Department / Cost Center

Duration	4 day
Participants	10
CPE Units	28
Course Level	Basic
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

---

# Hospital Materials Management Technical Workshop (HMC-301)

## Who Should Attend

Staff responsible for installing and operating HMMS on a daily basis.

## Prerequisites

Some technical background.

## Course Description

This one-day on-site workshop covers the technical aspects of the online Inventory and Purchase Order modules of the HMMS system and the daily / monthly / year-end batch processing flows.

## Course Outline

- HMMS/PO Job Flow
- EDI and PO Internals
- Security Internals
- System Install Techniques
- Maintenance Installations
- Project Reporting System

Duration	1 day
Participants	10
CPE Units	7
Course Level	Advanced
Field of Study	Specialized Knowledge and Applications

*This course is available upon request only.*

