

*Services*
*Training*

# " The Key to Success ... "

## Knowledge and Familiarity

One of the key factors in establishing an optimal implementation and therefore a satisfied customer is successful training. With the training provided by De Facto, you can maximize the functionality of your software, achieve self-sufficiency, and lower your total cost of ownership. That way you'll really achieve or even exceed the expected levels of return on your investment.

## The Benefits of Understanding

In order to really gain the maximum benefit to your business from your software, you need to become proficient and truly comfortable with it. To that end, De Facto gets you there with customisable, comprehensive, and flexible education solutions. These solutions are designed to support all your appropriate employees across all relevant modules and functionality.



All training on the de Facto package takes place via a series of standard structured training courses.



**Initial Training** - The primary objective of the project implementation cycle is to enable the Project Team to gain a thorough understanding of the de Facto package and its capabilities. This consists of full training through our standard structured training courses for the nominated members of the Project Team. This stage is undertaken prior to configuration of the software.

**Ongoing Training** - This is undertaken for other users, either during the business process test cycle phase, or subsequent to the implementation.

The training will vary between Project Team members and other users of the system, as follows:

**Project Team** - Team members attend the appropriate standard training courses prior to the Configuration Workshop, as follows:

- ▶ Foundation Course - 1 day
- ▶ Financials Introduction - 1 day
- ▶ Logistics Introduction - 1 day
- ▶ ODBC/Vistas Fundamentals - ½ day
- ▶ System Admin Fundamentals - ½ day

**Other Users** - Each user of the system will have introductory training based on the standard Foundation Course. Equally, for specific training needs De Facto can tailor a suitable course and we are happy to support a 'Train the Trainer' regime if appropriate.

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# " ... de Facto Training "

Course	Foundation	Financials	Logistics	ODBC/Vistas	System Administration
<b>Length</b>	1 Day	1 Day	1 Day	½ Day	½ Day
<b>Before you come</b>	<ul style="list-style-type: none"> <li>▶ Be at ease with using the keyboard and mouse in a Windows environment.</li> <li>▶ Understand where de Facto S5 is to fit within your company.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Attended the Foundation Day.</li> <li>▶ Have a basic understanding of normal accounting practice.</li> <li>▶ Knowledge of your company's proposed and/or existing accounting practices.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Attended the Foundation Day.</li> <li>▶ Knowledge of your company's: <ul style="list-style-type: none"> <li>• Proposed and/or existing Stock Control procedures.</li> <li>• Proposed and/or existing Purchase and Sales Order Processing procedures.</li> <li>• Existing Sales/Purchase Pricing and Discount process.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▶ Attended the Foundation Day.</li> <li>▶ Some understanding and experience of using 'power user' functions within a spreadsheet or database would be an advantage.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Attended the Foundation Day.</li> <li>▶ Some understanding of software administration and computer operating systems would be an advantage.</li> <li>▶ Knowledge of your company's security policy.</li> </ul>
<b>Aims of course</b>	<ul style="list-style-type: none"> <li>▶ To give the Project Team members a basic understanding of de Facto S5's terms, navigation and generic functionality.</li> <li>▶ To enable you to use the <b>CRM Module</b>.</li> <li>▶ To enable you to create simple Vistas.</li> </ul>	<ul style="list-style-type: none"> <li>▶ To enable you to configure the <b>Nominal, Sales, and Purchase Ledger</b>, along with <b>Banking</b>.</li> <li>▶ To understand the connection between the Logistics Transactions and the Postings to the Ledgers.</li> </ul>	<ul style="list-style-type: none"> <li>▶ To enable you to configure all aspects of <b>Stock Control</b>, Pricing, Discounts, Purchase and Sales Order Processing.</li> <li>▶ To enable you to process different types of Stock movement.</li> <li>▶ To enable you to insert new <b>Purchase and Sales Orders</b> and to process them.</li> </ul>	<ul style="list-style-type: none"> <li>▶ To enable you to construct <b>Vistas</b> for various purposes.</li> <li>▶ To enable you to construct Object Data Base Connections (ODBC) for Reporting purposes.</li> <li>▶ To enable you to construct a SQL Query.</li> </ul>	<ul style="list-style-type: none"> <li>▶ To enable you to define User access to elements of de Facto S5.</li> <li>▶ To enable you to configure Printing functions.</li> <li>▶ To enable you to <b>Import and Export Data</b>.</li> <li>▶ To enable you to configure all Administration Parameters.</li> </ul>
<b>After the course you should be able to</b>	<ul style="list-style-type: none"> <li>▶ Navigate around de Facto S5 and its windows.</li> <li>▶ Use the CRM Module.</li> <li>▶ Understand the basis of what is and is not possible to achieve in each Module.</li> <li>▶ Perform basic Reporting using all Printing facilities.</li> <li>▶ Understand common Parameters and Terminology.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Use all of the <b>Financial Modules</b>.</li> <li>▶ Configure the Nominal Chart of Accounts.</li> <li>▶ Configure new Customer, Supplier and Bank Accounts.</li> <li>▶ Configure the parameters for all Financial Modules.</li> <li>▶ Produce basic Financial Reports.</li> <li>▶ Understand Nominal Interface structures.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Configure new products with all associated information.</li> <li>▶ Insert and process Purchase and Sales Transactions.</li> <li>▶ Maintain Pricing and Discount structures.</li> <li>▶ Configure the parameters for all <b>Logistic Modules</b>.</li> <li>▶ Produce <b>basic Reports</b>.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Construct a single file Vista.</li> <li>▶ Construct a multiple file Vista.</li> <li>▶ Construct a prompted entry Vista.</li> <li>▶ Define default Vistas by user by function.</li> <li>▶ Turn a Vista into a published Report.</li> <li>▶ Construct an ODBC Report using SQL Query to refine the results.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Configure a new user with all Security Requirements defined.</li> <li>▶ Configure <b>Administration Parameters</b>, including Event Management.</li> <li>▶ Configure all Printing requirements.</li> <li>▶ Understand how to Export/Import Data to/from de Facto S5.</li> <li>▶ Understand upgrading to a new version of de Facto S5.</li> </ul>