



***Sample
Training Outlines***

Using the Sample Training Outlines

Completed by:	Local FACTS Office Training Administrator and/or FACTS Implementation Consultant
Purpose:	To assist in developing FACTS Training.
How it is used:	This document gives an example of the topics that should be covered in FACTS training. A separate outline is provided for each of the two types of training: Project Leader/System Manager Training and User Training. Use these outlines as a guide in developing your training.
When it is used:	Complete during training.
Who uses it:	Local FACTS Office
File under:	Training and Testing/FACTS Training
Last revised:	05/01
File:	<p>Sample Training Outlines.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

Sample FACTS Training Outlines

Project Leader/System Manager

- ☐ Introduction to FACTS
 - Navigation (Character and GUI)
 - On-line help and documentation
 - Messages
- ☐ Sales Orders
 - SO Parameter Setups (Static/Non-Static F/M)
 - SO Infrequent File Maintenances
 - SO Entry Options F/M
 - SO General Ledger Posting Flow
 - Contract Pricing
- ☐ Inventory Control
 - IC Parameter Setups (Static/Non-Static F/M)
 - IC Infrequent File Maintenances
 - IC General Ledger Posting Flow
- ☐ Accounts Receivable
 - AR Parameter Setups (Static/Non-Static F/M)
 - AR Infrequent File Maintenances
 - AR Tax Codes
 - AR General Ledger Posting Flow
- ☐ Purchase Orders
 - PO Parameter Setups (Static/Non-Static F/M)
 - PO Infrequent File Maintenances
 - PO General Ledger Posting Flow
- ☐ Accounts Payable
 - AP Parameter Setups (Static/Non-Static F/M)
 - AP Infrequent File Maintenances
 - AP General Ledger Posting Flow
- ☐ General Ledger
 - GL Parameter Setups (Static/Non-Static F/M)
 - GL Infrequent File Maintenances
 - GL Journal Setup
 - GL Chart of Accounts Setup
- ☐ Sales Analysis
 - SA Parameter Setups (Static/Non-Static F/M)

Sample FACTS Training Outlines

Project Leader/System Manager

- ☐ System Management
 - User Codes and Security
 - Menu System
 - Terminal F/M
 - Company/System Control F/M
 - Banking System
 - Report Templates
 - Search Preferences
 - Inquiry Preferences
 - Job Stream Setup
 - Office Automation Setup

☐ Other: _____

☐ Other: _____

☐ Other: _____

☐ Other: _____

Sample FACTS Training Outlines

User Training

- ☐ Introduction to FACTS
 - Navigation (keyboard and function keys)
 - On-line Help and documentation
 - Messages

- ☐ Sales Orders
 - Order Entry Suite(Pick Tickets, Confirmation, Direct Invoice, Credit Memo, Counter Sale)
 - MSDS System
 - DOT System
 - Cash Drawer Handling
 - Deposits
 - Recurring Orders
 - Shipping/Freight
 - Customer Returns System
 - Blanket Sales Orders
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ☐ Inventory Control
 - Adding New Items (Stocked, Non-Stocked, Uninventoried)
 - Catalog Items
 - Serial/Lot Inventory
 - Item Interchange
 - Inventory Adjustments
 - Warehouse Transfers
 - Costing and Pricing
 - Electronic Price Updates (Overview)
 - Physical Inventory (Cycle Counts)
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ☐ Advanced Inventory Control
 - Gordon Graham Inventory Replenishment

Sample FACTS Training Outlines

User Training

- ❑ Accounts Receivables
 - Adding New Customers
 - Adding Ship-To's
 - Invoice Processing
 - Recurring Invoices
 - Cash Receipt Application
 - Returned Checks
 - Dunning Letters
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ❑ Purchase Orders
 - Suggested PO's
 - PO Entry
 - Receiving
 - Invoice Receiving
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ❑ Accounts Payable
 - Adding New Vendors
 - Document Entry and Adjustments
 - Recurring Documents
 - Payment and Hold Selection
 - Checks
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

Sample FACTS Training Outlines

User Training

- ☐ General Ledger
 - Current Period Journal Entries
 - Prior Period Journal Entries
 - Recurring/Reversing/Allocating Entries
 - Financial Reports Setup
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ☐ Sales Analysis
 - Posting
 - Inquiries
 - Reports and Prints
 - Daily, Weekly, and Monthly Procedures
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ☐ System Management
 - Report Templates
 - Search Preferences
 - Inquiry Preferences
 - Office Automation
 - Inquiries
 - Reports and Prints
 - Specific Company Policies and Procedures
 - Custom Modifications
 - Where to go for Additional Support

- ☐ Other:
