



Learning Paths

Infor SyteLine v8

Table of Contents

- Before You Start Taking the Courses on Your Path7
- For Education Administrators9
- Engineering12
- Financial Management15
- Foundation.....29
- Human Capital Management.....31
- Performance Management34
- Production Management35
- Quality Management49
- Sales & Order Management50
- Service Management.....54
- Supply Chain Management56
- Technology59

Getting Your Training Program Started

This document outlines the learning paths for project team members wanting to learn how to use Infor SyteLine v8.

To learn the topics you're responsible for:

1. Start by selecting a generic, function-based path
2. Next, talk to your project manager and expand or personalize your path using the course list

If you're an education administrator, you need to work through the following material **before** you assign out learning paths.

- [Before You Start Taking the Courses on Your Path](#) (read all the material in this section)
- [Finding Courses & Getting Organized](#) (watch the video and download the tools)
- [Infor Campus Overviews](#) (watch the videos)

If you would like to modify this document, please contact Infor Education, and we will provide you the source Word file.

Happy learning 😊

Creating Learning Paths

Step 1: Select a Function-based Path

Get started by selecting the generic, function-based path that most closely matches your responsibilities.

Next, take the courses in the order shown, starting with the Foundation. Click on the titles to go to the *Course Details* section of this document where you'll find links to the materials.

After you begin, talk to your project manager to identify an expanded path using the learning path table for SyteLine v8.

<p>Foundation (all paths start here)</p> <ol style="list-style-type: none"> 1. Before You Start Taking the Courses on Your Path (read all the material in this section) 2. SyteLine: User Interface 3. SyteLine: Foundation 101 <p>Accounts Payable</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Using Accounts Payable <p>Account Receivable</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Using Accounts Receivable <p>Customer Service</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Using Customer Service\Order Entry <p>Engineering</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Managing Inventory 3. SyteLine: Using Bills of Material & Engineering Change Notices (BOM/ECN) 	<p>Financial Control</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Managing the General Ledger 3. SyteLine: Using the Excel Financial Reporting Toolset 4. SyteLine: Managing Inventory 5. SyteLine: Purchasing 6. SyteLine: Using Bills of Material & Engineering Change Notices (BOM/ECN) 7. SyteLine: Job Shop Manufacturing 8. SyteLine: Costing <p>Inventory Control</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Managing Inventory <p>Procurement</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Purchasing <p>Production</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Managing Inventory 3. SyteLine: Using Bills of Material & Engineering Change Notices (BOM/ECN) 4. SyteLine: Job Shop Manufacturing 	<p>Planning & Scheduling</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Managing Inventory 3. SyteLine: Using Bills of Material & Engineering Change Notices (BOM/ECN) 4. SyteLine: Job Shop Manufacturing 5. SyteLine: Using Customer Service\Order Entry 6. SyteLine: Using Advanced Planning & Scheduling (APS) <p>IT</p> <ol style="list-style-type: none"> 1. Foundation courses 2. SyteLine: Systems Administration Introduction 3. SyteLine: Personalizing Forms 4. SyteLine: SQL Server Reporting Services (SSRS)
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Step 2: Personalize Your Path

If you need to expand or change a function-based path to meet your needs, or if you need to create a completely new path, work through the steps below **with your project manager**. When it's time to start learning, you will find links to the courses and materials in the *Course Details* section of this document.

1. Start with the Foundation

Include all courses in Step 1; these are the pre-requisites to ALL of the other courses.

2. Continue with the Fundamentals

Include the courses you and your project manager identify you need in Step 2. Be aware that some courses have pre-requisites. Any course that's indented means that the parent course is a pre-requisite. For example, you need to take *Managing the General Ledger* before taking *Understanding Multi-Currency*.

3. Finish with Advanced Topics

Add the courses you and your project manager identify you need in Step 3. These are courses for topics that are advanced or used only in special circumstances. Some of these courses have multiple pre-requisites from different topic categories. We've listed the pre-requisites below each course with a checkmark ✓.

SyteLine Course List

Category	Step 1	Step 2	Step 3
Orientation	<ul style="list-style-type: none"> • Before You Start Taking the Courses on Your Path (.5h) 		
Foundation	<ul style="list-style-type: none"> • SyteLine: User Interface (4h) <ul style="list-style-type: none"> ○ SyteLine: Foundation 101 (16h) 		<ul style="list-style-type: none"> • SyteLine: Multi-site Foundation (16h) <ul style="list-style-type: none"> ✓ Purchasing ✓ Customer Service/Order Entry ✓ General Ledger
Financial Management		<ul style="list-style-type: none"> • SyteLine: Managing the General Ledger (8h) <ul style="list-style-type: none"> ○ SyteLine: Using the Excel Financial Reporting Toolset (4h) ○ SyteLine: Understanding Multi-Currency (8h) • SyteLine: Using Accounts Payable (8h) • SyteLine: Using Accounts Receivable (8h) • SyteLine: Managing Fixed Assets (4h) 	<ul style="list-style-type: none"> • SyteLine: Costing (16h) <ul style="list-style-type: none"> ✓ Purchasing ✓ General Ledger ✓ Job Shop Manufacturing • SyteLine: Understanding the Credit Card Interface (4h) <ul style="list-style-type: none"> ✓ Accounts Receivable • SyteLine: Navigating the Tax Interface (4h) <ul style="list-style-type: none"> ✓ Tax topic in Advanced Order Entry
Human Capital Management		<ul style="list-style-type: none"> • SyteLine: Managing Payroll (4h) • SyteLine: Using Human Resources (4h) 	<ul style="list-style-type: none"> • Payroll Interface (4h)

Category	Step 1	Step 2	Step 3
Engineering		<ul style="list-style-type: none"> • SyteLine: Using Bills of Material & Engineering Change Notices (BOM/ECN) (8h) 	<ul style="list-style-type: none"> • SyteLine: Estimating (8h) • FasView (4h) • SyteLine: Using Features & Options Product Configurator (8h)
Performance Management		<ul style="list-style-type: none"> • SyteLine: Using the Workbench Suite (8h) 	<ul style="list-style-type: none"> • SyteLine: Configuring BI (8h)
Production Management		<ul style="list-style-type: none"> • SyteLine: Job Shop Manufacturing (8h) <ul style="list-style-type: none"> ◦ SyteLine: Outside Process Management (4h) • SyteLine: Repetitive Manufacturing (8h) • SyteLine: Warehouse Mobility (8h) • Doc-Trak (4h) • Shop-Trak (8h) 	<ul style="list-style-type: none"> • SyteLine: Managing Projects (8h) <ul style="list-style-type: none"> ✓ General Ledger ✓ Accounts Payable ✓ Accounts Receivable • SyteLine: Using Advanced Planning & Scheduling (APS) (8h) <ul style="list-style-type: none"> ✓ Job Shop or Repetitive Mfg ✓ Customer Order Entry • SyteLine: Using the Scheduler (8h) <ul style="list-style-type: none"> ✓ Job Shop or Repetitive Mfg • SyteLine: Material Requirements Planning (8h) • SyteLine: Using Co-products and By-products (8h) <ul style="list-style-type: none"> ✓ Job Shop Mfg • EDI (8h) • Advanced Forecasting (8h) • SytePlan (8h)
Quality Management			<ul style="list-style-type: none"> • SyteLine: Using Quality Control Solution (QCS) – Supplier (8h) <ul style="list-style-type: none"> ✓ Purchasing • SyteLine: Using Quality Control Solution (QCS) - In Process (8h) <ul style="list-style-type: none"> ✓ Job Shop Manufacturing • SyteLine: Using Quality Control Solution (QCS) – Customer (8h) <ul style="list-style-type: none"> ✓ Customer Service\Order Entry ✓ Return Material Authorizations • SyteLine: Using Quality Control Solution (QCS) – Enterprise (8h)

Category	Step 1	Step 2	Step 3
Sales & Order Management		<ul style="list-style-type: none"> • SyteLine: Using Customer Service/Order Entry (8h) <ul style="list-style-type: none"> ○ SyteLine: Pick, Pack & Ship (4h) ○ SyteLine: Using Customer Relationship Management (4h) ○ SyteLine: Using Advanced Order Entry (16h) ○ SyteLine: Managing Return Material Authorizations (8h) 	<ul style="list-style-type: none"> • SyteLine: Portals – Customer (8h) • SyteLine: Portals – Reseller (8h)
Service Management		<ul style="list-style-type: none"> • SyteLine: Using Advanced Plant Maintenance (8h) • SyteLine: Using SyteLine Service (8h) 	<ul style="list-style-type: none"> • Remote Service Manager
Supply Chain Management		<ul style="list-style-type: none"> • SyteLine: Managing Inventory (16h) • SyteLine: Purchasing (8h) <ul style="list-style-type: none"> ○ SyteLine: Using Request for Quote (4h) 	<ul style="list-style-type: none"> • SyteLine: Portals – Vendor (8h)
Technology		<ul style="list-style-type: none"> • SyteLine: Systems Administration Introduction (8h) • SyteLine: Personalizing Forms (8h) • SyteLine: SQL Server Reporting Services (16h) 	<ul style="list-style-type: none"> • SyteLine: Using the Application Event System (16h) • SyteLine: Using Mongoose to Extend the Application (16h) <ul style="list-style-type: none"> ✓ Personalizing Forms • SyteLine Mobile (4h) • Bartender (4h)
Country Packs			<ul style="list-style-type: none"> • Talk to your implementation consultant for details about your specific country
Industry Packs			<ul style="list-style-type: none"> • Talk to your implementation consultant for details about your specific industry pack

Before You Start Taking the Courses on Your Path

Please read all the material in this section.

Course Options

When it's time to take a course, go to the *Course Details* portion of this document. You may have up to three types of courses to choose from as shown below.

On-site, Instructor-led Training	No	Yes
Public, instructor-led Training	Yes	No
Self-paced Video Course	Yes	No

Notice, we said that you **“may”** have up to three types to choose from.

- **All** of the topics can be learned via on-site, private events. Some of these are formal courses, and some are informal workshops.
- **Many, but not all** of the topics can be learned using courses and materials found in the Info Campus SyteLine, CloudSuite Industrial, or CloudSuite Business education subscription

Why aren't some courses taught as public, instructor-led or self-paced courses? The answer is that some courses don't have a high enough demand to merit a public event or because they involve more complex topics that are best taught on-site.

The Education Footprint Excel workbook found in the Help Center on [Infor Campus](#) provides a quick summary view of which courses can be learned via the education subscription and which must be learned via a private, on-site event.

If you need an on-site course, contact your Infor account manager to request an event. Please note that the cost of these on-site, private events are **not** covered by the SyteLine, CloudSuite Business, or CloudSuite Industrial education subscriptions.

Subscription Courses and Materials

The training subscription includes:

- Training guides for formal courses

Self-paced Videos

- Virtual, public instructor-led courses

The subscription provides self-paced or instructor-led courses for many, but not all, of the formal courses. For some topics, the subscription provides Self-paced Videos. For others, it provides instructor-led courses, most of which are taught over the internet. For others, it provides both videos and instructor-led courses.

When a topic has both instructor-led and self-paced video course options, you do **not** need to take both. Both types of courses use the same training guide and cover the **exact** same material. If you decide to use the self-paced courses, please note:

- The videos match up with the **sections or lessons** on the Training guide
- The video **descriptions** refer to the topics in the section that are covered in the video

Whatever option you select, you will need a login to the Demo database to do the exercises in the class.

Hands-on Exercises and the Demo Database

You will learn and retain significantly more if you perform the exercises that are included in the formal courses. All of the exercises in these courses are designed to be performed in the SyteLine\CloudSuite Demo database (sometimes called the “bicycle” database) that comes with the product. Before taking a course, please ask your system administrator to give you a login to a fresh instance of the SyteLine\CloudSuite Demo database so you can do the hands-on work.

Your Login to Infor Campus

All of the links found in the *Course Details* point to courses or materials on Infor Campus. You will need a login to take the courses. If you don't have a login to Campus, go to education.infor.com and click the “New User?” link to request one.

Instructor-Led Course Versions

When you begin to work through your learning path, you will see that the instructor-led courses have a “v9” in their title. While the user interface is slightly different between version 8 and version 9, **97% of the concepts, processes, and procedures are the same**. Furthermore, the courses are designed so that anyone on any version can attend. The instructors are trained to point out any differences, so please feel free to register.

For Education Administrators

The courses in this section are for Training Administrators.

Finding Courses & Getting Organized

Take the self-paced video course shown below.

Note: In the video course, you will see a different set of learning path documents. Your organization will **not** be using those; they will be using this document instead.

Type	Course Name	Description
Video	SyteLine: Finding Courses and Getting Your Training Organized	When you finish you'll be able to (1) quickly find the courses and guides you need using the Dynamic SyteLine Catalog, (2) immediately start learning using the SyteLine Learning Paths, and (3) organize more complex training programs for your users or customers using the SyteLine Training Planner. Find the current dynamic catalog, learning paths, and training planner shown in this video, in the Campus Help Center in the left sidebar.

Infor Campus Overviews

Your users should use this document as the primary method to find and access courses on Infor Campus. However, you will want to know about the information below to help them better. But remember that they will experience less confusion if they simply use the links in this document.

Type	Course Name	Description
Video	Infor: Infor Campus SyteLine Subscription Overview	A video overview of the SyteLine subscription and how to best use it.
Video	Infor: Registering for Courses on Infor Campus	Registering for eLearning and Instructor-Led courses on Infor Campus

Detail Contents

Getting Your Training Program Started	2
Creating Learning Paths	3
Before You Start Taking the Courses on Your Path	7
For Education Administrators	9
Detail Contents	10
Engineering	12
SyteLine: Estimating.....	12
SyteLine: Using Bills of Material and Engineering Change Notices.....	12
SyteLine: Using the Features and Options Product Configurator	13
FasView	14
Financial Management	15
SyteLine: Costing	15
SyteLine: Managing Fixed Assets	23
SyteLine: Managing the General Ledger.....	23
SyteLine: Navigating the Tax Interface	25
SyteLine: Understanding Multi-Currency.....	25
SyteLine: Understanding the Credit Card Interface	25
SyteLine: Using Accounts Payable	25
SyteLine: Using Accounts Receivable.....	26
SyteLine: Using the Excel Financial Reporting Toolset	28
Foundation	29
SyteLine: Foundation 101.....	29
SyteLine: Multi-site	31
SyteLine: User Interface.....	31
Human Capital Management	32
SyteLine: Managing Payroll.....	32
SyteLine: Using Human Resources	33
Payroll Interface.....	33
Performance Management	34
SyteLine: Configuring BI.....	34
SyteLine: Using the Workbench Suite	34
Production Management	35
Advanced Forecasting.....	35
Doc-Trak.....	35
EDI.....	35
Shop-Trak.....	35

SyteLine: Job Shop Manufacturing	35
SyteLine: Managing Projects.....	36
SyteLine: Material Requirements Planning	38
SyteLine: Outside Process Management	39
SyteLine: Repetitive Manufacturing.....	39
SyteLine: Using Advanced Planning & Scheduling (APS)	40
SyteLine: Using Co-products and By-products	45
SyteLine: Using the Scheduler	45
SyteLine: Warehouse Mobility	48
SytePlan	48
Quality Management	49
SyteLine: Using Quality Control Solution (QCS) – Customer	49
SyteLine: Using Quality Control Solution (QCS) – Enterprise.....	49
SyteLine: Using Quality Control Solution (QCS) – Supplier & In Process	49
Sales & Order Management	50
SyteLine: Managing Return Material Authorizations	50
SyteLine: Pick, Pack & Ship	51
SyteLine: Portals – Customer.....	51
SyteLine: Portals – Reseller	51
SyteLine: Using Advanced Order Entry.....	51
SyteLine: Using Customer Relationship Management.....	52
SyteLine: Using Customer Service/Order Entry	53
Service Management	54
Remote Service Manager.....	54
SyteLine: Using Advanced Plant Maintenance	54
SyteLine: Using SyteLine Service	54
Supply Chain Management	56
SyteLine: Managing Inventory	56
SyteLine: Portals – Vendor.....	57
SyteLine: Purchasing.....	57
SyteLine: Using Request for Quote	58
Technology	59
Bartender	59
SyteLine Mobile	59
SyteLine: Personalizing Forms.....	59
SyteLine: SQL Server Reporting Services (SSRS).....	61
SyteLine: Systems Administration Introduction	62
SyteLine: Using the Application Event System	63
SyteLine: Using Mongoose to Extend the Application	63

Engineering

SyteLine: Estimating

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Estimating v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series

Public Instructor-led Training

Type	Title	Description
Instructor-led	SyteLine: v9 Estimating	This course introduces the SyteLine estimating functionality which includes creating estimate orders and job orders, preparing a quote, scheduling estimate jobs, creating customer orders from estimates, and creating job orders from estimates. This training is for version: 9.00. Previous course name: Infor SyteLine: Using Estimating - Training Workbook.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Estimates - eLearning (v8.00 - v8.03)	Estimate orders, estimate job orders, calculating profit margins, creating quotes, converting to customer orders and job orders, basic configuration.

SyteLine: Using Bills of Material and Engineering Change Notices

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Bill of Material/Engineering Change Notices v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series
- Public Instructor-led Training

Take either the 3-part series or the one course that includes all 3 parts. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Course Name	Description
Instructor-led	SyteLine: v9 Using Bills of Material & Engineering Change Notices (BOM/ECN)	This course covers the creation and management of bills of material (BOMs) in the SyteLine system, including the item records, routing, resources, and materials that make up the BOM. It also includes instruction on the use of Engineering Change Notices (ECNs) to manage item revisions. This training is for SyteLine versions: 9.00 and all previous versions.

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Course Name	Description
Video	SyteLine: v8 Bill of Material and Engineering Change Notices - eLearning (v8.03)	This course covers the creation and management of bill of materials (BOMs) in the system, including the item records, routing, resources, and materials that make up the BOM. It also includes instruction on the use of Engineering Change Notices (ECNs) to manage item revisions.

SyteLine: Using the Features and Options Product Configurator

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Features and Options Product Configurator v8](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

FasView

Estimated time required: 4 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Financial Management

SyteLine: Costing

Estimated time required: 16 hours

Training guide: Guide used in self-paced course: [SyteLine: Training Guide - Costing v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series

Public Instructor-led Training

Take either the 5-part series or the one course that includes all 5 parts. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Costing	This course introduces the components, requirements, and procedures to manage Costing in the SyteLine application. Topics include how different costing methods – Standard and Actual, Average, Last in first out (LIFO), First in first out (FIFO), and Specific are used when SyteLine creates inventory transactions. This course also covers maintenance requirements of a SyteLine standard costing system, how to research costing information, all the various costing transactions that SyteLine processes create, and cost flows from inventory setup. Costing reports and how these reports can be used in day-to-day business processes is also included. This training is for version 9.00 and all previous versions.

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Title	Description
Video	SyteLine: Costing v8 - Sec00: Preface Part 01	What you need to start the class

Type	Title	Description
Video	SyteLine: Costing v8 - Sec00: Preface Part 02	v8.03 Update -- Class changes and additions for version 8.03 (make sure you download the v8.03 training guide to see the new material)
Video	SyteLine: Costing v8 - Sec01: Item and Inventory Account Setup Part 01	Introduction
Video	SyteLine: Costing v8 - Sec01: Item and Inventory Account Setup Part 02	How to set an item's cost type and method
Video	SyteLine: Costing v8 - Sec01: Item and Inventory Account Setup Part 03	How to set up accounts used in inventory transactions
Video	SyteLine: Costing v8 - Sec01: Item and Inventory Account Setup Part 04	Journal transaction report
Video	SyteLine: Costing v8 - Sec01: Item and Inventory Account Setup Part 05	Material transaction report
Video	SyteLine: Costing v8 - Sec01: Item and Inventory Account Setup Part 06	Item costing report Wrap up
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 01	Introduction
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 02	Average cost method
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 03	Exercise: get ready
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 04	Exercise: average cost method - standard cost
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 05	Exercise: average cost method - actual cost
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 06	LIFO/FIFO cost method
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 07	Exercise: LIFO/FIFO cost method - standard cost

Type	Title	Description
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 08	Exercise: LIFO/FIFO cost method - actual cost
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 09	Specific cost method
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 10	Exercise: specific cost method - standard cost
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 11	Exercise: specific cost method - actual cost
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 12	Standard cost method
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 13	Exercise: standard cost method
Video	SyteLine: Costing v8 - Sec02: How the Cost Methods Work Part 14	Wrap up
Video	SyteLine: Costing v8 - Sec03: Purchasing Master Files and Reports Part 01	Introduction to costing for purchased items How does the purchased unit cost get updated?
Video	SyteLine: Costing v8 - Sec03: Purchasing Master Files and Reports Part 02	What is the cost flow of purchased items?
Video	SyteLine: Costing v8 - Sec03: Purchasing Master Files and Reports Part 03	How to set up the default accounts for receiving and vouchering What is the vouchers payable report? What is the purchase order variance report?
Video	SyteLine: Costing v8 - Sec03: Purchasing Master Files and Reports Part 04	What is the material transactions report?
Video	SyteLine: Costing v8 - Sec03: Purchasing Master Files and Reports Part 05	Exercise: identify source of variance Wrap up
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 01	About the exercises in this section Purchase orders Exercise: create and update PO line cost
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 02	Purchase order receiving Exercise: prepare journal

Type	Title	Description
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 03	Exercise: PO receiving - standard cost
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 04	Exercise: PO receiving - actual cost
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 05	Purchase order vouchering Exercise: purchase order vouchering - standard cost
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 06	Exercise: purchase order vouchering - actual cost
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 07	Wrap up
Video	SyteLine: Costing v8 - Sec04: Purchasing Costing Part 08	v8.03 Update -- Purchase Overhead
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 01	Introduction to costing for manufactured items Where do I see the current unit cost?
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 02	Where do I find the fields used in the costing formulas?
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 03	How to update the current manufactured unit cost
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 04	Exercise: current BOM cost roll-up
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 05	How to calculate direct material costs Exercise: calculate direct material costs
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 06	How to calculate direct labor costs How to update cost rates on the operation form Exercise: calculate direct labor costs
Video	SyteLine: Costing v8 - Sec05: Manufactured Costs - Direct Costs Part 07	How to calculate outside processing costs wrap up
Video	SyteLine: Costing v8 - Sec06: Manufactured Costs - Overhead Part 01	Introduction to overhead cost

Type	Title	Description
Video	SyteLine: Costing v8 - Sec06: Manufactured Costs - Overhead Part 02	How to turn on overhead application on a work center Exercise: turn on overhead application
Video	SyteLine: Costing v8 - Sec06: Manufactured Costs - Overhead Part 03	How to calculate labor overhead costs Exercise: calculate labor overhead costs
Video	SyteLine: Costing v8 - Sec06: Manufactured Costs - Overhead Part 04	How to calculate machine overhead costs Exercise: calculate machine overhead costs
Video	SyteLine: Costing v8 - Sec06: Manufactured Costs - Overhead Part 05	How to calculate material overhead Exercise: calculate material overhead
Video	SyteLine: Costing v8 - Sec06: Manufactured Costs - Overhead Part 06	Exercise: calculate total overhead cost
Video	SyteLine: Costing v8 - Sec07: Manufactured Costs - Views Part 01	What are accumulated and assembly costs? Indented current BOM report
Video	SyteLine: Costing v8 - Sec07: Manufactured Costs - Views Part 02	Exercise: calculate accumulated and assembly costs
Video	SyteLine: Costing v8 - Sec07: Manufactured Costs - Views Part 03	Exercise: calculate accumulated and assembly costs 2 (optional)
Video	SyteLine: Costing v8 - Sec07: Manufactured Costs - Views Part 04	Wrap up
Video	SyteLine: Costing v8 - Sec08: Manufactured Standard Unit Cost Part 01	Note about the exercises Where does standard unit cost come from? How to view standard costs How to compare current and standard costs How to calculate manufactured standard cost
Video	SyteLine: Costing v8 - Sec08: Manufactured Standard Unit Cost Part 02	Exercise: identify cause of difference between standard and current cost
Video	SyteLine: Costing v8 - Sec08: Manufactured Standard Unit Cost Part 03	Exercise: calculate standard unit cost (optional)
Video	SyteLine: Costing v8 - Sec08: Manufactured Standard Unit Cost Part 04	Wrap up
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 01	Note on the exercises Introduction

Type	Title	Description
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 02	How to define accounts used to capture job costs
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 03	Calculate variances against How to define accounts used for standard cost variances
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 04	Employees Shift codes
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 05	Exercise: set parameters
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 06	Job exceptions report
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 07	WIP valuation report
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 08	Job cost detail breakout report
Video	SyteLine: Costing v8 - Sec09: Job Order Costing - Master Files Part 09	Material transactions report Job shop manufacturing cost reports
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 01	Job Orders
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 02	Job Materials
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 03	Exercise: prepare for exercise
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 04	Exercise: view and update costs
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 05	Job order material issuing Exercise: issue materials - standard cost
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 06	Exercise: issue materials - actual cost

Type	Title	Description
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 07	Job operations
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 08	Unposted job transactions Post job transactions Exercise: post labor and pieces complete - standard cost
Video	SyteLine: Costing v8 - Sec10: Job Order Costing - Accumulating Costs Part 09	Exercise: post labor and pieces complete - actual cost
Video	SyteLine: Costing v8 - Sec11: Job Order Costing - Moving to Stock Part 01	Cost based on complete operations or jobs Job order production receipt
Video	SyteLine: Costing v8 - Sec11: Job Order Costing - Moving to Stock Part 02	Exercise: purge journal
Video	SyteLine: Costing v8 - Sec11: Job Order Costing - Moving to Stock Part 03	Exercise: move finished goods to inventory - standard cost
Video	SyteLine: Costing v8 - Sec11: Job Order Costing - Moving to Stock Part 04	Exercise: move finished goods to inventory - actual cost
Video	SyteLine: Costing v8 - Sec12: Job Order Costing - Closing the Job Part 01	Job order closing
Video	SyteLine: Costing v8 - Sec12: Job Order Costing - Closing the Job Part 02	Exercise: close job - standard cost
Video	SyteLine: Costing v8 - Sec12: Job Order Costing - Closing the Job Part 03	Exercise: close job - actual cost
Video	SyteLine: Costing v8 - Sec12: Job Order Costing - Closing the Job Part 04	Wrap up
Video	SyteLine: Costing v8 - Sec13: Process Costing - Master Files Part 01	Introduction
Video	SyteLine: Costing v8 - Sec13: Process Costing - Master Files Part 02	Work centers Product codes
Video	SyteLine: Costing v8 - Sec13: Process Costing - Master Files Part 03	Production costs by work center report Work center transactions report Exercise: repetitive mfg cost reports

Type	Title	Description
Video	SyteLine: Costing v8 - Sec13: Process Costing - Master Files Part 04	Wrap up
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 01	How to directly charge labor to the work center How to directly charge machine overhead to a work center
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 02	Exercise: prepare for exercises
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 03	Exercise: charge labor directly to a work center
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 04	How to directly issue materials to a work center Exercise: issue materials directly to a work center
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 05	Production schedules Production schedule items Production schedule release operations Production schedule release materials
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 06	How to backflush costs and post pieces complete Exercise: post pieces complete
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 07	How to mark pieces scrapped and move to scrap expense account Exercise: post pieces scrapped
Video	SyteLine: Costing v8 - Sec14: Process Costing - Accumulating Costs Part 08	Wrap up
Video	SyteLine: Costing v8 - Sec15: Process Costing - Closing a Period Part 01	Work centers End of period costing Exercise: close work center Wrap up
Video	SyteLine: Costing v8 - Sec16: Customer Order Costing Part 01	Customer order master files Order cost report Exercise: Print Reports
Video	SyteLine: Costing v8 - Sec16: Customer Order Costing Part 02	Customer order shipping Exercise: Customer order shipping - standard cost
Video	SyteLine: Costing v8 - Sec16: Customer Order Costing Part 03	Exercise: Customer order shipping - actual cost

SyteLine: Managing Fixed Assets

Estimated time required: 4 hours

Training Guide: [SyteLine: Training Guide - Fixed Assets v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course

Public Instructor-led Training

Take either of the courses below.

Type	Title	Description
Instructor-led	SyteLine: v9 Managing Fixed Assets	This course covers SyteLine's fixed assets features including how to set up for fixed assets, add new fixed assets, track costs, calculate and post depreciation, transfer assets, dispose of assets, and generate fixed asset reports.
Instructor-led	SyteLine: v9 Managing Fixed Assets (Instructor-Supported)	This Fixed Assets class is part of the set of courses offered during the instructor-supported financial week. You may register for one or all of the courses offered during the week. In instructor-supported courses, you will attend a live online orientation meeting, then work through the video course at your own pace. As you work, our instructors will be on-hand to answer questions and help you work through the material. At the end of the week, you will attend another live meeting to wrap up the course. Please note: this course is only available to users whose companies have an education subscription. This course should take you the number of hours shown in the duration to complete. However, when you put in those hours during the week is up to you.

SyteLine: Managing the General Ledger

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - General Ledger v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series

Public Instructor-led Training

Take either of the courses below.

Type	Title	Description
Instructor-led	SyteLine: v9 Managing the General Ledger	This course covers the charts of accounts, creating accounting periods, budgets, and user journals. Entering normal, reversing, and recurring journal entries, year-end processing procedures and printing financial statements are also covered. This course will also cover setting up multiple financial sets of books. This training is for version 9.0 and all previous versions.
Instructor-led	SyteLine: v9 Managing the General Ledger (Instructor-Supported)	This General Ledger class is part of the set of courses offered during the instructor-supported financial week. You may register for one or all of the courses offered during the week. In instructor-supported courses, you will attend a live online orientation meeting, then work through the video course at your own pace. As you work, our instructors will be on-hand to answer questions and help you work through the material. At the end of the week, you will attend another live meeting to wrap up the course. Please note: this course is only available to users whose companies have an education subscription. This course should take you the number of hours shown in the duration to complete. However, when you put in those hours during the week is up to you.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 General Ledger - eLearning (v8.03)	This course covers the charts of accounts, creating accounting periods, budgets, and user journals. Entering normal, reversing, and recurring journal entries, year-end processing procedures and printing financial statements are also covered. This course will also cover setting up multiple financial sets of books.

SyteLine: Navigating the Tax Interface

Estimated time required: 4 hours

Training guide: [SyteLine: Training Guide - Tax Interface v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Understanding Multi-Currency

Estimated time required: 8 hours

Training Guide: [SyteLine: Training Guide - Multi-Currency v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Understanding the Credit Card Interface

Estimated time required: 4 hours

Training guide: [SyteLine: Training Guide - Credit Card Interface v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using Accounts Payable

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Accounts Payable v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series

Public Instructor-led Training

Take either of the courses below.

Type	Title	Description
Instructor-led	SyteLine: v9 Using Accounts Payable	This course covers basic SyteLine accounts payable processes, including setting up accounts payable accounts and specifying accounts payable parameters, setting up vendors, creating and posting vouchers, generating and distributing payments, and printing, posting, and voiding checks. This training is for version(s): 9.00 and all previous versions.
Instructor-led	SyteLine: v9 Using Accounts Payable (Instructor-Supported)	This Accounts Payable class is part of the set of courses offered during the instructor-supported financial week. You may register for one or all of the courses offered during the week. In instructor-supported courses, you will attend a live online orientation meeting, then work through the video course at your own pace. As you work, our instructors will be on-hand to answer questions and help you work through the material. At the end of the week, you will attend another live meeting to wrap up the course. Please note: this course is only available to users whose companies have an education subscription. This course should take you the number of hours shown in the duration to complete. However, when you put in those hours during the week is up to you.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Accounts Payable - eLearning (v8.03)	Setting up accounts payable accounts and specifying accounts payable parameters, setting up vendors, creating and posting vouchers, generating and distributing payments, and printing, posting, and voiding checks.

SyteLine: Using Accounts Receivable

Estimated time required: 8 hours

Training Guide: [SyteLine: Training Guide - Accounts Receivable v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series

Public Instructor-led Training

Take either of the courses below.

Type	Title	Description
Instructor-led	SyteLine: v9 Using Accounts Receivable	This course covers learning the basic accounts receivable tools in SyteLine to perform the tasks of creating customer records, creating, distributing, and posting invoices, credits and payments, managing customer credit, and posting to bank reconciliations. Also covered are setting up various system parameters that support accounts receivable workflows. This training is for versions 9.00 and all previous versions.
Instructor-led	SyteLine: v9 Using Accounts Receivable (Instructor-Supported)	This Accounts Receivable class is part of the set of courses offered during the instructor-supported financial week. You may register for one or all of the courses offered during the week. In instructor-supported courses, you will attend a live online orientation meeting, then work through the video course at your own pace. As you work, our instructors will be on-hand to answer questions and help you work through the material. At the end of the week, you will attend another live meeting to wrap up the course. Please note: this course is only available to users whose companies have an education subscription. This course should take you the number of hours shown in the duration to complete. However, when you put in those hours during the week is up to you.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Accounts Receivable - eLearning (v8.03)	This course covers learning the basic accounts receivable tools to perform the tasks of creating customer records, creating, distributing, and posting invoices, credits, and payments, managing customer credit, and posting to bank reconciliations. Also covered are setting up various system parameters that support accounts receivable workflows.

SyteLine: Using the Excel Financial Reporting Toolset

Estimated time required: 4 hours

Training Guide:

- Training Guide: [SyteLine: Training Guide - Excel Financial Reporting Toolset v8.03](#)
- Data set for course: [SyteLine: Training Guide - Excel Financial Reporting Toolset - Class Data v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course
- The self-paced video series

The self-paced course is for v8, but the material applies to v9 and the CloudSuites. Read the product release notes to find out what's new in the later version.

Public Instructor-led Training

Take either of the courses below.

Type	Title	Description
Instructor-led	SyteLine: v9 Using the Excel Financial Reporting Toolset	This is a one-part class that follows the sections outlined in the SyteLine Excel toolset training guide. To be ready for the class you must (1) download the training guide from the Campus site; (2) ask the system administrator at your company to install a fresh instance of the SyteLine Demo DB that comes with the SyteLine software and give you a login to it; (3) install Excel on your computer; (4) have your administrator install the SyteLine Excel addin on your computer.
Instructor-led	SyteLine: v9 Using the Excel Financial Reporting Toolset (Instructor-Supported)	This Excel Financial Reporting Toolset class is part of the set of courses offered during the instructor-supported financial week. You may register for one or all of the courses offered during the week. In instructor-supported courses, you will attend a live online orientation meeting, then work through the video course at your own pace. As you work, our instructors will be on-hand to answer questions and help you work through the material. At the end of the week, you will attend another live meeting to wrap up the course. Please note: this course is only available to users whose companies have an education subscription. This course should take you the number of hours shown in the duration to complete. However, when you put in those hours during the week is up to you.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Excel Financial Reporting Toolset - eLearning (v8.02 - v8.03)	Setting up the Excel Financial Toolset and using it to build financial statements.

Foundation

SyteLine: Foundation 101

Estimated time required: 16 hours

Training guides:

- [SyteLine: Training Guide - SyteLine 101 - Workshop 1: Master Files v8.03](#)
- [SyteLine: Training Guide - SyteLine 101 - Workshop 2: Logistics and Mfg v8.03](#)
- [SyteLine: Training Guide - SyteLine 101 - Workshop 3: Accounting and Finance v8.03](#)

Take either:

- A private on-site workshop
- The self-paced video course

Public Instructor-led Training

Provided on an on-site basis. See the section on Learning Options in this guide to find out how to request an event.

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Course Name	Description
Video	SyteLine: 101 v8 - W1-01: Introduction	Discuss how this class is setup and what we will be doing.
Video	SyteLine: 101 v8 - W1-02: Customers	Setup Customers

Type	Course Name	Description
Video	SyteLine: 101 v8 - W1-03: Items	Setup Items Item Pricing Item Cost
Video	SyteLine: 101 v8 - W1-04: Vendors	Vendor Setup Vendor Contracts
Video	SyteLine: 101 v8 - W1-05: Work Centers	Setup Work Centers
Video	SyteLine: 101 v8 - W1-06: Bills of Manufacturing Part 1	Bill of Material Setup
Video	SyteLine: 101 v8 - W1-06: Bills of Manufacturing Part 2	Bill of Material Setup Continued
Video	SyteLine: 101 v8 - W1-07: Employees	Employee Setup
Video	SyteLine: 101 v8 - W1-08: System Wide Settings	Review Parameters Forms
Video	SyteLine: 101 v8 - W2-01: Create Customer Orders	Customer Orders Customer Order Lines Order Verification
Video	SyteLine: 101 v8 - W2-02: Plan	MRP Planning Material Planner Workbench
Video	SyteLine: 101 v8 - W2-03: Create Mfg Orders	Customer Order Lines Job Orders
Video	SyteLine: 101 v8 - W2-04: Create Purchase Orders	Material Planner Workbench Purchase Orders Due to the format of the content of this course, the status will not change from "Not Started" after launching the course.
Video	SyteLine: 101 v8 - W2-05: Receive Purchase Orders	Receiving
Video	SyteLine: 101 v8 - W2-06: Dispatch Mfg Orders	Job Packet
Video	SyteLine: 101 v8 - W2-07: Issue Materials	Job Material Transactions
Video	SyteLine: 101 v8 - W2-08: Record Production	Unposted Job Transactions
Video	SyteLine: 101 v8 - W2-09: Receive Finished Goods	Job Receipt
Video	SyteLine: 101 v8 - W2-10: Ship	Shipping
Video	SyteLine: 101 v8 - W3-01: Invoice Customer Orders	Invoice
Video	SyteLine: 101 v8 - W3-02: Invoices Recorded in Receivables	Invoices, Debit and Credit Memos Invoice Posting
Video	SyteLine: 101 v8 - W3-03: Process Invoice Payment	Payments Payment Posting
Video	SyteLine: 101 v8 - W3-04: Voucher Purchase Orders	Generate Ap Transactions

Type	Course Name	Description
Video	SyteLine: 101 v8 - W3-05: Voucher Recorded in Payables	Vouchers and Adjustments Voucher Posting
Video	SyteLine: 101 v8 - W3-06: Pay Vouchers	Check Printing and Posting
Video	SyteLine: 101 v8 - W3-07: Create General Journal Entries	General Journals Due to the format of the content of this course, the status will not change from "Not Started" after launching the course.
Video	SyteLine: 101 v8 - W3-08: Post Journals to GL	Mass Journal Posting
Video	SyteLine: 101 v8 - W3-09: Analyze Financial Information	Financial Statement Output

SyteLine: Multi-site

Estimated time required: 16 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: User Interface

Estimated time required: 4 hours

Training Guide: [SyteLine: Training Guide - User Interface v8.03](#)

Take either:

- A public ILT course
- The self-paced video series

Public Instructor-led Training

Even though the courses say "v9", they are actually taught so that anyone on any version can take them.

Type	Course Name	Description
Instructor-led	SyteLine: v9 User Interface Part 1 - Finding & Viewing Records	You should take this class BEFORE you take any other SyteLine class. This is one part of a two-part class. The class follows the sections outlined in the SyteLine User Interface training guide. For details on each topic, please see the training guide. Part 1: Section 1 - How to view data Part 2: Sections 2-3 - How to work with the data & How to set up basic personalization's.
Instructor-led	SyteLine: v9 User Interface Part 2 - Updating & Adding Records	You should take this class BEFORE you take any other SyteLine class. This is one part of a two-part class. The class follows the sections outlined in the SyteLine User Interface training guide. For details on each topic, please see the training guide. Part 1: Section 1 - How to view data Part 2: Sections 2-3 - How to work with the data & How to set up basic personalization's.

Self-paced Videos

Type	Course Name	Description
Video	SyteLine: v8 User Interface - eLearning (v8.03)	Finding forms; finding, adding, and editing records; running reports, activities, utilities; moving data to and from Excel.

Human Capital Management

SyteLine: Managing Payroll

Estimated time required: 4 hours

Training guide: [SyteLine: Training Guide - Payroll v8.03](#)

Take either:

- A public ILT course
- A private on-site workshop

Public Instructor-led Training

Type	Course Name	Description
Instructor-led	SyteLine: v9 Managing Payroll	This course introduces the payroll functionality in SyteLine, including how to set up and manage payroll, employee, pay rates, tax codes, and direct deposit information. This training is for versions: 9.00 and all previous versions.

SyteLine: Using Human Resources

Estimated time required: 4 hours

Training guide: [SyteLine: Training Guide - Human Resources v8.03](#)

Take either:

- A public ILT course
- A private on-site workshop

Public Instructor-led Training

Type	Course Name	Description
Instructor-led	SyteLine: v9 Using Human Resources	This course covers human resources functionality in SyteLine, including how to manage organization, applicant, employee, position, payroll, and benefit information. This training is for versions: 9.00 and all previous versions.

Payroll Interface

Estimated time required: 4 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Performance Management

SyteLine: Configuring BI

Estimated time required: 8 hours.

At the current time, there are no formal materials for this topic. This course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using the Workbench Suite

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Workbench Suite v8.03](#)

Take either:

- A public ILT course
- An on-site, private ILT course

Public Instructor-led Training

Take the course shown below. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Using the Workbench Suite	This course covers the tools and capabilities of SyteLine’s Workbench Suite by providing hands-on practice with key features of the application. Students will gain experience with DataViews, Data Search, DataView Actions, and critical numbers and will explore options for implementing workbenches in their organizations.

Production Management

Advanced Forecasting

Estimated time required: 16 hours.

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Doc-Trak

Estimated time required: 4 hours.

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

EDI

Estimated time required: 16 hours.

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Shop-Trak

Estimated time required: 8 hours.

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Job Shop Manufacturing

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Job Shop Mfg v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Type	Title	Description
Instructor-led	SyteLine: v9 Job Shop Manufacturing	This course covers creating a job bill of material (BOM), setting up job defaults, creating job orders, issuing materials to jobs, entering and posting job transactions, backflushing, posting finished goods to inventory, and the various tools SyteLine offers for helping plan work. This training is for version: 9.00. Previous course name/code: SyteLine – Job Shop Manufacturing – Training Workbook/702201303415.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Job Shop Mfg - eLearning (v8.03)	This course covers creating a job bill of material (BOM), setting up job defaults, creating job orders, issuing materials to jobs, entering and posting job transactions, backflushing, posting finished goods to inventory, and the various tools the system offers for helping plan work.

SyteLine: Managing Projects

Estimated time required: 8 hours.

Training guide: [SyteLine: Training Guide - Projects v8.03](#)

Take either:

- The public ILT
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Type	Title	Description
Instructor-led	SyteLine: v9 Managing Projects	This course covers all phases of project planning and management including how to set up parameters, creating estimate projects, creating projects for which actual cost will accumulate, analyzing percent of completion to view costs, planning for and issuing project resources, applying labor, linking purchase orders or requisitions, cross-referencing to a job order, capturing costs, and performing cost analysis at various levels of detail. The course concludes with how to create revenue milestones and recognize revenue for a project. This training is for version 9.00 and all previous versions.

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Title	Description
Video	SyteLine: Projects v8 - Sec02: Estimate Projects Part 01	Default Project Parameters Project Types Cost Codes Exercise Estimate Projects - Address Estimate Projects - General Exercise
Video	SyteLine: Projects v8 - Sec02: Estimate Projects Part 02	Estimate Project Creation Estimate Project Tasks - General Exercise
Video	SyteLine: Projects v8 - Sec02: Estimate Projects Part 03	Estimate Project Tasks - MS Project Estimate Project Resources - General Estimate Project Resources - Cost Exercise Estimate Project Tasks - % Complete
Video	SyteLine: Projects v8 - Sec02: Estimate Projects Part 04	Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec03: Projects Part 01	Project Parameters Project Types Cost Codes Copy Projects Exercise
Video	SyteLine: Projects v8 - Sec03: Projects Part 02	Projects - Address Projects - General Exercise Projects - Percent Complete Useful Reports Project Tasks - General Project Tasks - Microsoft Project Project Resources - General Project Resources - Cost Project Tasks - % Complete Useful Reports Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec04: Planning and Projects Part 01	Project Resources - General Material Planner Workbench Planning Detail Wrap Up Exercise

Type	Title	Description
Video	SyteLine: Projects v8 - Sec05: Project Transactions Part 01	Project Parameters Product Codes - Project Project Resource Transaction Posting Useful Reports Employees - General Useful Reports Departments Useful Reports Project Labor
Video	SyteLine: Projects v8 - Sec06: Purchasing and Projects Part 01	Project Resources - General Purchase Order Requisition Lines - General Project Resources - General Purchase Order Receiving Useful Report Sample Journal Entries Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec07: Job Orders and Projects Part 01	Unposted Job Transactions Post Job Transactions Useful Report Sample Labor Transaction Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec07: Job Orders and Projects Part 02	Project Parameters Project Resources - General Job Order - Schedule Exercise
Video	SyteLine: Projects v8 - Sec07: Job Orders and Projects Part 03	Job Material Transactions Useful Report Sample Transactions Exercise
Video	SyteLine: Projects v8 - Sec08: Vouchering and Projects Part 01	Vouchers and Adjustments A/P Voucher & Adjustment Distribution Voucher/Adjustment Posting Sample Transactions Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec09: Shipping and Projects Part 01	Project Resource Shipping Project Resources - Shipping Packing Slip Useful Reports Advance Ship Notices Useful Reports Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec10: Work Breakdown Structure and Projects Part 01	Work Breakdown Structures Work Breakdown Structure - Percent Complete Useful Reports Wrap Up Exercise
Video	SyteLine: Projects v8 - Sec11: Work in Process and Projects Part 01	Project Parameters Distribution Account Maintenance Projects - WIP Projects - WIP Relief Project Tasks - WIP Project Tasks - WIP Relieved Print/Post Project WIP Relief Sample Transaction
Video	SyteLine: Projects v8 - Sec11: Work in Process and Projects Part 02	Exercise

SyteLine: Material Requirements Planning

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Material Requirements Planning \(MRP\) v8.03](#)

Take either:

- The public ILT
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Take the course below. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Classroom	SyteLine: v9 Material Requirements Planning (MRP)	This course covers MRP processes, including setting up items for MRP, setting up a bill of materials (BOM), forecasting, running the MRP activity, creating a master production schedule (MPS), setting MRP parameters, and firming planned orders. This training is for versions: 9.00 and all previous versions.

Self-paced Videos

Type	Title	Description
Video	SyteLine: MRP v8 - Sec00: Preface Part 01	What you need to complete the class successfully

SyteLine: Outside Process Management

Estimated time required: 4 hours

Training guide: [SyteLine: Training Guide - Outside Process Management v8.03](#)

This course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Repetitive Manufacturing

Estimated time required: 16 hours

Training guide: [SyteLine: Training Guide - Repetitive Mfg v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Take the course below. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Repetitive Manufacturing	This course provides an overview of SyteLine’s repetitive production control system and lists the factors to consider for its implementation. It also covers the setup for repetitive manufacturing, the use of operation control points and backflushing, creation of standard and production schedule BOMs, development and implementation of a production schedule, and the repetitive manufacturing processing. This training is for version 9.00 and all previous versions.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Repetitive Mfg - eLearning (v8.00 - v8.03)	This course provides an overview of the repetitive production control system and lists the factors to consider for its implementation. It also covers the setup for repetitive manufacturing, the use of operation control points and backflushing, creation of standard and production schedule BOMs, development and implementation of a production schedule, and the repetitive manufacturing processing.

SyteLine: Using Advanced Planning & Scheduling (APS)

Estimated time required: 24 hours

Training guides:

- [SyteLine: Training Guide - Adv Planning & Scheduling \(APS\) v8.03](#)
- [SyteLine: Training Guide - Adv Planning & Scheduling \(APS\) Workshop v8.03](#)

Take either:

- A private on-site workshop
- The self-paced video series

Self-paced Videos

Type	Title	Description
Video	SyteLine: APS v8.03 - Sec00: Preface Part 01	What you need to start the class
Video	SyteLine: APS v8.03 - Sec00: Preface Part 02	v8.03.10 Update -- Class changes and additions for version 8.03 (make sure you download the v8.03 training guide to see the new material)
Video	SyteLine: APS v8.03 - Sec01: Introduction Part 01	Introduction to the class Overview of APS tasks and tools
Video	SyteLine: APS v8.03 - Sec01: Introduction Part 02	Review resource model
Video	SyteLine: APS v8.03 - Sec01: Introduction Part 03	Build Kid Carrier BOM, steps 1-5
Video	SyteLine: APS v8.03 - Sec01: Introduction Part 04	Build Kid Carrier BOM, steps 6-11
Video	SyteLine: APS v8.03 - Sec01: Introduction Part 05	Run APS
Video	SyteLine: APS v8.03 - Sec02: Promise Part 01	Plan new orders in real time, part 1
Video	SyteLine: APS v8.03 - Sec02: Promise Part 02	Plan new orders in real time, part 2
Video	SyteLine: APS v8.03 - Sec02: Promise Part 03	Customer order header Get ATP/CTP
Video	SyteLine: APS v8.03 - Sec02: Promise Part 04	Plan forecasts
Video	SyteLine: APS v8.03 - Sec02: Promise Part 05	Plan MPS orders, part 1
Video	SyteLine: APS v8.03 - Sec02: Promise Part 06	Plan MPS orders, part 2
Video	SyteLine: APS v8.03 - Sec02: Promise Part 07	v8.03.10 Update -- Demand Detail Chart APS
Video	SyteLine: APS v8.03 - Sec03: Queue Part 01	Identify orders projecting late
Video	SyteLine: APS v8.03 - Sec03: Queue Part 02	Identify overcapacity issues
Video	SyteLine: APS v8.03 - Sec03: Queue Part 03	Identify projected material shortages
Video	SyteLine: APS v8.03 - Sec03: Queue Part 04	Add overtime & downtime
Video	SyteLine: APS v8.03 - Sec04: Firm Part 01	Identify and firm planned orders that need to be released, part 1
Video	SyteLine: APS v8.03 - Sec04: Firm Part 02	Identify and firm planned orders that need to be released, part 2

Type	Title	Description
Video	SyteLine: APS v8.03 - Sec04: Firm Part 03	Verify materials available for jobs
Video	SyteLine: APS v8.03 - Sec05: Queue, part 2 Part 01	Identify late order issues, part 1
Video	SyteLine: APS v8.03 - Sec05: Queue, part 2 Part 02	Identify late order issues, part 2
Video	SyteLine: APS v8.03 - Sec06: WIP Part 01	Generating the shop floor schedule & dispatch with APS
Video	SyteLine: APS v8.03 - Sec06: WIP Part 02	How APS and the Scheduler work together
Video	SyteLine: APS v8.03 - Sec07: Review Part 01	Wrap up
Video	SyteLine: APS v8.03 - Sec07: Review Part 02	Review exercise, part 1
Video	SyteLine: APS v8.03 - Sec07: Review Part 03	Review exercise, part 2
Video	SyteLine: APS v8.03 - Sec07: Review Part 04	Review exercise, part 3
Video	SyteLine: APS v8.03 - Sec07: Review Part 05	Review exercise, part 4
Video	SyteLine: APS v8.03 - Sec08: What-if Analysis Part 01	Set up a what-if alternative
Video	SyteLine: APS v8.03 - Sec08: What-if Analysis Part 02	Perform what-if analysis as a class Perform what-if analysis in pairs
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 01	Introduction
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 02	Question 3: Accept Requirements
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 03	Question 3: Infinite (purchased items)
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 04	Question 3: Item type "Other"
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 05	Question 3: Phantom Flag
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 06	Question 3: Dedicated Warehouses
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 07	Question 4: Reorder Point

Type	Title	Description
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 08	Question 4: Mfg Part
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 09	Question 4: Hard-allocated supply (source-linking & configuration)
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 10	Question 4: Pass Requirements
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 11	Question 5: Lead Times
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 12	Question 5: Expedited lead times
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 13	Question 5: PCAL
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 14	Question 6: Sequence, Infinite Resource Capacity After, Cells
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 15	Question 7: resource group Quantity, operation hours
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 16	Question 7: Move, Finish, Move/Finish/Buffer Shift ID
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 17	Question 7: Break Rule
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 18	Question 8: Supply usage tolerance
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 19	Question 8: Order consolidation
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 20	Question 8: Shrink, Yield, Scrap Factor
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 21	Question 8: Safety stock

Type	Title	Description
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 22	Question 8: Time fence preservation
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 23	Question 8: Planned mfg supply switching
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 24	Question 8: Probable
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 25	Question 8: Planning precision
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 26	Question 8: Non-nettable locations
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 27	Question 9: Buffer in time, buffer out time
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 28	Question 10: The Planning Period
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 29	Question 10: Supply Availability
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 30	Question 10: Exception messages, source-linked supply
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 31	Question 10: Planning Method Adjustments
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 32	Question 10: Order prioritization
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 33	Question 10: Database setup & log files
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 34	Question 10: Orders to exclude from the plan
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 35	Questions 11 & 12: what if alternatives & multi-site

Type	Title	Description
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 36	v8.03.10 Update -- Expected Receipts APS
Video	SyteLine: APS v8.03 - Sec09: APS Configuration Parameters Part 37	v8.03.10 Update -- Must Use Future POs
Video	SyteLine: APS v8.03 - Sec10: Class Wrap Up Part 01	Review Planning Fields & Forms Next Steps

SyteLine: Using Co-products and By-products

Estimated time required: 16 hours

Training guide: [SyteLine: Training Guide - Co-products & By-products v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using the Scheduler

Estimated time required: 16 hours

Training guides:

- [SyteLine: Training Guide - Scheduler v8.03](#)
- [SyteLine: Training Guide - Scheduler Workshop v8.03](#)

Take either:

- A private on-site workshop
- The self-paced video series

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Title	Description
Video	SyteLine: Scheduler v8.03 - Sec00: Preface Part 01	What you need to start the class

Type	Title	Description
Video	SyteLine: Scheduler v8.03 - Sec01: Introduction Part 01	Introduction to the class
Video	SyteLine: Scheduler v8.03 - Sec01: Introduction Part 02	Overview of Scheduler tasks and tools
Video	SyteLine: Scheduler v8.03 - Sec01: Introduction Part 03	Review resource model
Video	SyteLine: Scheduler v8.03 - Sec01: Introduction Part 04	Build child carrier scenario, part 1
Video	SyteLine: Scheduler v8.03 - Sec01: Introduction Part 05	Build child carrier scenario, part 2
Video	SyteLine: Scheduler v8.03 - Sec02: Set Job Priorities & Schedule Jobs Part 01	Enter job orders
Video	SyteLine: Scheduler v8.03 - Sec02: Set Job Priorities & Schedule Jobs Part 02	Prioritize jobs
Video	SyteLine: Scheduler v8.03 - Sec02: Set Job Priorities & Schedule Jobs Part 03	Schedule orders
Video	SyteLine: Scheduler v8.03 - Sec03: Identify On-time Completion Issues Part 01	View scheduler analysis, part 1
Video	SyteLine: Scheduler v8.03 - Sec03: Identify On-time Completion Issues Part 02	View scheduler analysis, part 2
Video	SyteLine: Scheduler v8.03 - Sec03: Identify On-time Completion Issues Part 03	Add overtime & downtime
Video	SyteLine: Scheduler v8.03 - Sec04: What-if Analysis Part 01	Add more jobs
Video	SyteLine: Scheduler v8.03 - Sec04: What-if Analysis Part 02	Create a new what-if alternative
Video	SyteLine: Scheduler v8.03 - Sec04: What-if Analysis Part 03	View the schedule in a what-if alternative
Video	SyteLine: Scheduler v8.03 - Sec04: What-if Analysis Part 04	Test changes as a class and in pairs, part 1
Video	SyteLine: Scheduler v8.03 - Sec04: What-if Analysis Part 05	Test changes as a class and in pairs, part 2

Type	Title	Description
Video	SyteLine: Scheduler v8.03 - Sec05: Adjust & Communicate Dispatch Part 01	Adjust dispatch
Video	SyteLine: Scheduler v8.03 - Sec05: Adjust & Communicate Dispatch Part 02	Print dispatch
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 01	Introduction
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 02	Set up batch definition
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 03	Set up batch definition operation
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 04	Assign a batch definition
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 05	Schedule batches & view status, part 1
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 06	Schedule batches & view status, part 2
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 07	Manually create a batch
Video	SyteLine: Scheduler v8.03 - Sec06: Batching Part 08	Post partial work
Video	SyteLine: Scheduler v8.03 - Sec07: Review Part 01	Wrap up
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 01	Introduction
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 02	Question 3: must complete & allow overrun
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 03	Question 3: infinite & finite scheduling
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 04	Question 3: Allocation
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 05	Question 4: Introduction and Shift ID
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 06	Question 4: Setup times
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 07	Question 4: Split size

Type	Title	Description
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 08	Question 5: Scheduling parameters
Video	SyteLine: Scheduler v8.03 - Sec08: Scheduler Configuration Parameters Part 09	Work priority rules exercise
Video	SyteLine: Scheduler v8.03 - Sec09: Class Wrap Up Part 01	Review scheduler fields Next steps

SyteLine: Warehouse Mobility

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Warehouse Mobility v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SytePlan

Estimated time required: 8 hours.

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Quality Management

SyteLine: Using Quality Control Solution (QCS) – Customer

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Quality Control Solution \(QCS\) - Customer v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using Quality Control Solution (QCS) – Enterprise

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Quality Control Solution \(QCS\) - Enterprise v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using Quality Control Solution (QCS) – Supplier & In Process

Estimated time required: 16 hours

Training guide: [SyteLine: Training Guide - Quality Control Solution \(QCS\) - Supplier & In Process v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Sales & Order Management

SyteLine: Managing Return Material Authorizations

Estimated time required: 16 hours

Training guide: [SyteLine: Training Guide - Return Material Authorization v8.03](#)

Take either:

- The public, instructor-led course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Take the course below. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Managing Return Material Authorizations	This course covers learning the basic return material authorizations (RMAs) functionality in SyteLine to perform authorization of customer returns, receive returned materials back into inventory, process RMA replacements and repairs, and issue and post RMA credit memos. Setting system RMA parameters and defining RMA-related codes are also taught. Additionally, the new RMA extended disposition processing functions to support RMA items that require dispositions for vendor returns, scrapping, or cross-referencing to service repair orders (SROs) for repair are also covered. This training is for version 9.00 and all previous versions.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Return Material Authorization - eLearning (v8.03)	This course covers learning the basic return material authorizations (RMAs) functionality in the system to perform authorization of customer returns, receive returned materials back into inventory, process RMA replacements and repairs, and issue and post RMA credit memos. Setting system RMA parameters and defining RMA-related codes are also taught. Additionally, the new RMA extended disposition processing functions to support RMA items that require dispositions for vendor returns, scrapping, or cross-referencing to service repair orders (SROs) for repair are also covered.

SyteLine: Pick, Pack & Ship

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Pick, Pack, and Ship v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Portals – Customer

Estimated time required: 8 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Portals – Reseller

Estimated time required: 8 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using Advanced Order Entry

Estimated time required: 16 hours

Training Guide: [SyteLine: Training Guide - Adv Order Entry v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Type	Title	Description
Instructor-led	SyteLine: v9 Using Advanced Order Entry	This course introduces the mechanics of advanced order entry which includes inventory planning, customer order item reservations, advanced shipping transactions, credit memos, commission structures, point of sale (POS) transactions, and promotional pricing and rebate programs in SyteLine. This training is for versions: 9.00 and all previous versions. Click HERE to view course description and agenda.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Advanced Order Entry - eLearning (v8.02 - v8.03)	This course covers advanced order entry processes, including managing inventory, reserving inventory, pricing items, using sales tax systems, processing orders and credits, adjusting prices, creating progressive bills, setting up and processing commissions, promotional pricing, and rebates, and using surcharge functionality.

SyteLine: Using Customer Relationship Management

Estimated time required: 4 hours

Training Guide: [SyteLine: Training Guide - Customer Relationship Management \(CRM\) v8.02](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Take the course below. Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Using Customer Relationship Management	This course introduces SyteLine’s Customer Relationship Management. Topics include how to set up supporting files, creating and maintaining contacts, prospects and customers, creating leads and opportunities, and creating marketing campaigns. The course will conclude with how to integrate and sync Outlook to SyteLine’s Customer Relationship Management.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8.03 Customer Relationship Management (CRM)	This is a recording of the full virtual course taught by a live instructor and includes the material found in the training guide.

SyteLine: Using Customer Service/Order Entry

Estimated time required: 8 hours

Training Guide: [SyteLine: Training Guide - Customer Service/Order Entry v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Type	Title	Description
Instructor-led	SyteLine: v9 Using Customer Service/Order Entry	This course covers creating customer records, setting up customer order parameters, and creating, shipping, and invoicing customer orders. Basic customer service activities and using the Customer Service Home are also covered. SyteLine’s pick, pack, and ship functionality is also included. This training is for version(s): 9.00 and all previous versions.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Customer Service and Order Entry - eLearning (v8.03)	This course covers creating customer records, setting up customer order parameters, and creating, shipping, and invoicing customer orders. Basic customer service activities and using the Customer Service Home form are also covered.

Service Management

Remote Service Manager

Estimated time required: 4 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using Advanced Plant Maintenance

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Adv Plant Maintenance v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using SyteLine Service

Estimated time required: 8 hours

Training guides:

- [SyteLine: Training Guide - Field Service Plus - Contracts v8.03](#)
- [SyteLine: Training Guide - Field Service Plus - Incidents v8.03](#)
- [SyteLine: Training Guide - Field Service Plus - Service Orders and Scheduling v8.03](#)
- [SyteLine: Training Guide - Field Service Plus - Mobile Solution v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Using SyteLine Service	This course introduces the processes for setting up and using incidents, service orders and scheduling, and contracts in SyteLine. This training is for SyteLine version 9.00 and all previous versions.

Supply Chain Management

SyteLine: Managing Inventory

Estimated time required: 16 hours

Training guide: [SyteLine: Training Guide - Inventory Control v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Managing Inventory	This course covers the basic inventory management functions of the SyteLine system, to include creating and updating items, using lot and serial number tracking, performing physical and cycle inventory counts, performing miscellaneous inventory transactions, and creating, shipping, and receiving items on transfer orders. This training is for version(s): 9.00 and all previous versions.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Inventory Control - eLearning (v8.03)	This course covers basic inventory management functions, including setting inventory control parameters, creating inventory items, using lot and serial number tracking, using inventory forms and reports to monitor inventory status, performing inventory cycle counts and physical inventory counts, completing miscellaneous inventory transactions, and creating, shipping, and receiving transfer order items.

SyteLine: Portals – Vendor

Estimated time required: 8 hours.

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Purchasing

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Purchasing v8.03](#)

Take either:

- A public ILT course
- The self-paced video course
- A private on-site workshop

Public Instructor-led Training

Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Purchasing	This course covers fundamental SyteLine purchasing functionality, including planning for purchase orders, setting up vendors, generating purchase order requisitions, generating regular and blanket purchase orders, processing change orders and drop shipments, receiving purchase orders, and generating vouchers. This training is for versions: 9.00 and all previous versions.

Self-paced Videos

Type	Title	Description
Video	SyteLine: v8 Purchasing - eLearning (v8.03)	Vendors, purchase orders, blanket purchase orders, purchase order requisitions, basic configuration.

SyteLine: Using Request for Quote

Estimated time required: 4 hours

Training guide: [SyteLine: Training Guide - Request For Quote v8.03](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Technology

Bartender

Estimated time required: 4 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine Mobile

Estimated time required: 4 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Personalizing Forms

Estimated time required: 8 hours

Training guide: [SyteLine: Training Guide - Forms Personalization v8.02](#)

Take either:

- A public ILT course
- The self-paced video series

Public Instructor-led Training

Even though the courses say “v9”, they are actually taught so that anyone on any version can take them.

Type	Title	Description
Instructor-led	SyteLine: v9 Personalizing Forms	This course covers the basic formatting options used to personalize forms in the SyteLine system and includes instructions on how to assign formatting permissions, edit forms, as well as how to create components, strings, and event handlers. This training is for version(s): 9.00 and all previous versions.

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Title	Description
Video	SyteLine: Forms Personalization v8 - Sec01: Forms Editing Permissions Part 01	Form Editing Scope Form Editing Permissions Site Developer Full User Basic User & None
Video	SyteLine: Forms Personalization v8 - Sec01: Forms Editing Permissions Part 02	Form Editing Permissions Exercise
Video	SyteLine: Forms Personalization v8 - Sec02: Basic Form Editing Part 01	Changing Font and Color Defaults on Forms Changing Basic Display Properties Setting Tab Order for Components Revert Form Definition
Video	SyteLine: Forms Personalization v8 - Sec02: Basic Form Editing Part 02	Basic Form Editing Exercise
Video	SyteLine: Forms Personalization v8 - Sec03: Architecture in More Detail Part 01	The Form Data, IDO, and Database Relationship Inheritance Car Analogy Inheritance Hierarchy
Video	SyteLine: Forms Personalization v8 - Sec03: Architecture in More Detail Part 02	Inheritance Hierarchy The Main Point
Video	SyteLine: Forms Personalization v8 - Sec03: Architecture in More Detail Part 03	SyteLine Framework Exercise
Video	SyteLine: Forms Personalization v8 - Sec04: Working with Components Part 01	List of Components in SyteLine Adding Components to a Form Aligning and Arranging Components on a Form
Video	SyteLine: Forms Personalization v8 - Sec04: Working with Components Part 02	Adding Components Exercise
Video	SyteLine: Forms Personalization v8 - Sec05: Inherited Properties Part 01	Adding Specific Components Enhanced Combo Box Component Class Property Class Extensions Binding Components to IDO Properties
Video	SyteLine: Forms Personalization v8 - Sec05: Inherited Properties Part 02	Inherited Properties Exercise
Video	SyteLine: Forms Personalization v8 - Sec06: List Sources Part 01	List Sources IDO Collection
Video	SyteLine: Forms Personalization v8 - Sec06: List Sources Part 02	In Line List

Type	Title	Description
Video	SyteLine: Forms Personalization v8 - Sec06: List Sources Part 03	List Sources Exercise
Video	SyteLine: Forms Personalization v8 - Sec07: Validators Part 01	Validation Validate Immediately Validator Messages Types of Validators Considerstions When Using Validators Adding a Validator to a Component
Video	SyteLine: Forms Personalization v8 - Sec07: Validators Part 02	Validators Exercise
Video	SyteLine: Forms Personalization v8 - Sec08: Strings Part 01	Static Label Component Strings Styeline Use of Strings Creating a New String Viewing an Editing Strings
Video	SyteLine: Forms Personalization v8 - Sec08: Strings Part 02	Strings Exercise
Video	SyteLine: Forms Personalization v8 - Sec09: UET's & User-Defined Types Part 01	Adding UETs User-Defined Types
Video	SyteLine: Forms Personalization v8 - Sec09: UET's & User-Defined Types Part 02	User-Defined Type Exercise
Video	SyteLine: Forms Personalization v8 - Sec09: UET's & User-Defined Types Part 03	User Extended Table (UET) Exercise
Video	SyteLine: Forms Personalization v8 - Sec10: Event Handlers Part 01	Push Button Form Component Events and Event Handlers Adding an Event Handler to a Form Component Adding a Push Button Form Component
Video	SyteLine: Forms Personalization v8 - Sec10: Event Handlers Part 02	Event Handler Exercise
Video	SyteLine: Forms Personalization v8 - Sec11: Creating a New Form Part 01	Copying a Form Creating a New Form

SyteLine: SQL Server Reporting Services (SSRS)

Estimated time required: 16 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Systems Administration Introduction

Estimated time required: 8 hours

Training Guide: [SyteLine: Training Guide - System Administration Overview v8.02](#)

Take either:

- An on-site, private course
- The self-paced video series

The self-paced course is for v8, but the material applies to v9 and the CloudSuites. Read the product release notes to find out what's new on the later version.

Public Instructor-led Training

At the current time, this ILT course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

Self-paced Videos

Start with the first video and work your way down to the bottom of the list.

Type	Title	Description
Video	SyteLine: Sys Admin Overview v8.02 - Section 1 - Framework Architecture	Section 01: Framework Architecture
Video	SyteLine: Sys Admin Overview v8.02 - Section 2 - Database Creation	Section 02: Database Creation
Video	SyteLine: Sys Admin Overview v8.02 - Section 3 - Audit Trails	Section 03: Audit Trails
Video	SyteLine: Sys Admin Overview v8.02 - Section 4 - Miscellaneous Forms & Utilities	Section 04: Miscellaneous Forms and Utilities
Video	SyteLine: Sys Admin Overview v8.02 - Section 5 - User Management - Users	Section 05: SyteLine User Management - Users
Video	SyteLine: Sys Admin Overview v8.02 - Section 6 - User Management - Authorizations	Section 06: SyteLine User Management - Authorizations

SyteLine: Using the Application Event System

Estimated time required: 16 hours

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.

SyteLine: Using Mongoose to Extend the Application

Estimated time required: 16 hours

Training guide: [SyteLine: Training Guide - Developers Workshop v8](#)

At the current time, this course is taught only on an on-site, private basis. See the section on Learning Options in this guide to find out how to request an event.