

Sage Authorized  
Training by ISM  
2011

Course Catalog



sage

Authorized Partner

Select 2011

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## **Financial Application Courses**

### **Sage MAS 90/200 General Ledger**

1-day course, CPE Credits: 8

This course teaches the fundamentals of setting up and operating the Sage MAS 90 and 200 General Ledger. In this class, you will gain a basic understanding of multiple General Ledger setup options and learn how to define the chart of accounts. You will also learn the daily processing functions like entering journal entries. Register today and gain the required skill-set to retrieve information quickly, reduce processing time and increase productivity!

By the end of the course, you will be able to:

- Understand the multiple General Ledger setup options and setup your system
- Enter general journals using real-life scenarios
- Enter transaction journals, recurring entries, allocations, and saved journal entries
- Identify ways to increase your efficiency when processing entries
- Identify appropriate reports to use when faced with the need for specific information
- Print financial statements and other required reports

### **Sage MAS 90/200 Accounts Payable**

1-day course, CPE Credits: 8

This course offers the Sage MAS 90 and 200 users the opportunity to take advantage of the power and usability of the Accounts Payable module. Learn how to implement the software to meet your company's requirements and the processing skills to improve accuracy and save valuable time throughout your daily Accounts Payable tasks.

By the end of this course, you will be able to:

- Set up the application according to your company's specifications
- Enter a variety of Accounts Payable invoices using real life scenarios
- Identify and enter appropriate transactions

### **Sage MAS 90/200 Accounts Receivable**

1-day course, CPE Credits: 8

This course is your first step toward streamlined receivables processing and quicker invoice payments. In this course you will learn how to set up the module based upon your company's requirements, and the fundamentals of entering invoices, cash receipts and recurring invoices.

By the end of this course, you will be able to:

- Set up the Accounts Receivable module

- Enter a variety of Accounts Receivable invoices using real life scenarios
- Identify and enter appropriate transactions for adjusting invoices
- Accurately estimate cash flow based on receivables using the features available in the system
- Process payments against your customers accounts using a variety of methods
- Reconcile your Accounts Receivable to the General Ledger
- Identify appropriate reports to use when faced with the need for specific information

## **Sage MAS 90/200 Payroll**

1-day course, CPE Credits: 8

Attending this course will teach you the fundamentals of setting up and operating the Sage MAS 90o/200 Payroll system. Learn how to define payroll parameters, as well as the daily processing functions that will help the payroll specialist in your company complete their job efficiently and accurately.

By the end of the course, you will be able to:

- Define payroll parameters and implement the system
- Enter and process payroll transactions
- Calculate and process payroll checks
- Correct errors in payroll processing
- Process common payroll exceptions
- Identify appropriate reports to use when faced with the need for specific information
- Print and verify the appropriate tax and deduction reports

## **Sage MAS 90/200 Introduction and for System Administrators**

1-day course, CPE Credits: 8

Part 1: This class in intended to familiarize you with the system wide features available in Sage MAS 90 and 200 ERP. This course is divided into discussions of concepts, activities, and review.

Part 2: This course is intended for individuals responsible for managing their Sage MAS 90 and 200 ERP installations on a global basis. In this class you will learn to use the features available in Library Master, determining system wide preferences, company preferences, and security in Sage MAS 90 and 200.

This class will help you meet the following objectives:

- Learn Sage MAS 90 and 200 product family
- Learn what the Desktop is and how to use it
- Learn how to navigate in Sage MAS 90 and 200
- Learn the update process
- Learn how various dates are used by the system
- Learn how to print reports and forms and update
- Learn how to set up security

- Learn how to define system settings
- Learn how to create new companies
- Learn how to use the various tasks available in Library Master
- Learn how to use the Business Insights Dashboard
- Learn how to use the Business Insights Reporter

## **FAS (Fixed Asset Software)**

- 1-day course, CPE Credits: 8
- This course is designed to provide basic instruction to get the “new” user up-and-running with the FAS Asset Accounting System. The focus will be on the features of the product that will allow the user to quickly get up-to-speed and enable them to perform the day-to-day tasks of managing their fixed assets.

## **Operation Application Courses**

### **Sage MAS 90/200 Bill of Materials**

Use Bill of Materials to define the structure (bill) for items manufactured in Inventory Management. A bill can contain items, miscellaneous charges and comments. After completing the finished product, a transaction is recorded to track the receipt of the finished product and the issuance of the raw materials.

- Learn the features, functions, and set up of Bill of Materials
- Learn how to enter various types of bills: including phantom and kit bills
- Learn how to enter bill of materials into production
- Learn how to enter options on bills and the effect this has in Production Entry and Sales Order Entry
- Learn how to use yield and scrap percentages to account for wasted materials in the production process
- Learn the reports and inquiry tasks available

### **Sage MAS 90/200 Inventory Management**

1-day course, CPE Credits: 8

Successful Inventory Management starts with these important insights into setting up your Inventory Management System, including how to enter inventory items, kits and transactions and how to use these tools to count and update your physical inventory. This course guides attendees through the major functions of the Inventory Management solution. Register today and learn the fundamental steps to setting up the module, as well as the process of tracking and monitoring inventory.

By the end of the course, you will be able to:

- Set up the Inventory Management application

- Enter items, including kits, into inventory
- Use kits and transactions to update inventory
- Track inventory levels
- Generate reports
- Perform physical inventory

Who Benefits: MAS 90 and MAS 200 customers who are planning to use or are currently using the Inventory Management application as part of an efficient Wholesale Distribution solution.

### **Sage MAS 90/200 Sales Order**

1-day course, CPE Credits: 8

Now you can access the information you need, when you need it, for smoother flowing sales order processing. You'll save time and money using these powerful features.

By the end of the course, you will be able to:

- Set up the Sales Order application
- Process orders and invoices
- Generate presentation-quality reports
- Manage your shipping process

### **Sage MAS 90/200 Purchase Order Processing**

1-day course, CPE Credits: 8

Learn how to improve accuracy and squeeze unnecessary costs out of your purchasing process. This class provides detailed information and curriculum for implementing and operating your Purchase Order solution.

By the end of the course, you will be able to:

- Set up the Purchase Order application
- Create various types of purchase orders
- Receive items
- Generate reports and perform queries

### **Bank Reconciliation**

This course is intended for individuals responsible for reconciling bank accounts on a monthly basis. This course is divided into discussions of concepts, activities and review. After completing this course, you will have an understanding of the steps necessary for setting up Bank Reconciliation and how to enter bank transactions.

- Learn how to set up bank codes
- Learn how to enter miscellaneous checks and adjustments
- Learn how to reconcile the bank account

- Learn how to print the reports available in Bank Reconciliation

## **Report Writing Courses**

### **Intro to Crystal Reports for MAS 90/200**

Crystal Condensed, 1-day course, CPE Credits: 8

Reporting is an essential tool to any business. Attend this course to learn the fundamentals of using Crystal Reports. This course will begin by creating a simple report by accessing your accounting data and applying formatting, and will progress to more complex concepts such as using multiple tables and creating user-defined parameter fields. Learn to create presentation quality reports and the new features of Crystal Reports version 10. You will learn preset reporting options and how to pull data from the MAS 90 200 database to create custom reports and labels. We will cover the making of calculations and comparisons of values, setting up sub and grand total calculations, converting data from one type to another and testing for logical relationships between values.

Prerequisites: Attendance in the Data File Structures course is recommended but not required.

### **Crystal Reports – Beyond the Basics**

Crystal Condensed, 1-day course, CPE Credits: 8

Here's your opportunity to dramatically improve your ability to create customized reports that meet your unique business needs. You will learn how to use sub reports and complex formulas to generate new reports or enhance existing ones. Learn how to link multiple tables together in a single report. (Instructor-led group course)

By the end of the course, you will be able to:

- Create sub-reports for customizing
- Learn complex formulas for use in reports
- Link multiple tables using various types of joins
- Effective tips on customizing printed forms in Sage MAS 90 and 200
- Running totals & shared variables with the sub-reports for customizing line.
- Advanced formula evaluation and creation, including useful tips and tricks

Who Benefits: MAS 90 and MAS 200 customers who have some experience in creating reports in Crystal Reports

Prerequisites: Experience with Crystal Reports – attendance of Intro to Crystal Reports class preferred.

### **Sage MAS 90/200/500 FRx**

1-day course, CPE Credits: 8

Please note: This is an accelerated class. Normally taught in 2 days, we condense into 1 day.

This class provides a basic understanding of the features and functionality of FRx. Learn how to link to external worksheets and create financial reports combining multiple Sage MAS 90 companies. By learning the ins and outs of this report writer, you can design presentation-quality financial reports that provide insights into your business and support for your decisions.

By the end of the course, you will be able to:

- Navigate within the application
- Link to the Sage MAS 90 or 200 companies General Ledger data
- Create row formats and column layouts
- Define a report and use reporting trees
- Create calculations and filter data on your reports
- Bring data from worksheets onto your reports
- Create reports that combine from multiple companies

## **Technical Courses**

### **Data File Structures**

This class is intended to provide the necessary knowledge of the Sage MAS 90 and 200 ERP data file structure in order to use Visual Integrator and Crystal Reports most effectively.

- Learn how the directory structure is organized
- Learn which directories and files are created as part of the installation
- Learn which directories and files are created by user interaction with the program
- Learn how to use the options available on the Sage Software Online Web site
- Learn how to understand the different data file types
- Learn how information is stored and updated to data files
- Learn how to access data files using the SOTAMAS90 ODBC driver

### **Sage MAS 90/200 V4.4 Customizer**

Customizer allows you to modify Sage MAS 90/200 windows to work the way you do. This helps to increase productivity by improving data entry speed and accuracy.

- Learn how to customize existing items for Sage MAS 90/200 panels
- Learn how to add user-defined fields (UDFs)
- Learn how to create and enter information into user-defined fields (UDFs)
- Learn how to add user-defined fields and user-defined tables to panels
- Learn how to create links to other programs, bitmaps, multimedia files, DDE scripts, and MS scripts.

## Sage MAS 90/200 Business Insights Explorer

Sage Business Insights Explorer for MAS 90 and 200 is a powerful and easy-to-use adhoc inquiry and analysis tool for mining your data and empowering your decision making.

This course is intended for individuals who want to use Business Insights to better access key data in their system. No previous experience with MAS 90/200 is required, but a general knowledge of the system is useful.

- Learn how to navigate the Business Insights Explorer window
- Learn how to customize the Business Insights Explorer view, including filtering and grouping data
- Learn how to save a customized Business Insights Explorer view
- Learn how to export data from the Explorer view and create reports and charts
- Learn how to set up the options and maintain web pages for Business Insights Dashboard
- Learn how to launch and update Business Insights Dashboard
- Learn how to select and create custom reports using Business Insights Reporter

## Specialized Courses

### Sage MAS 90/200 Paperless Office

Go green! Are you ready to go paperless in Sage MAS 90/200 and Extended Enterprise Suite?

In this course you will learn how to set up and use Paperless Office for creating PDF documents for forms, reports, and registers/journals. Find out how to determine which forms and reports can be created using Paperless Office as well as how you can secure these documents.

In paperless office, you can:

- Secure documents with viewer access rights
- Improve turn-around times with the ability to set up documents such as journals, registers, period-end reports, standard reports, and forms such as sales orders and invoices to be electronically delivered as they are generated.
- You can create default e-mail message for each document
- Your PDF's can later be viewed, moved, electronically delivered, or purged in the appropriate viewer task.
- You can also determine whether a password is required to open a PDF document.
- How to define specific settings for a company to use Paperless Office.
- How to define settings for forms, journals/registers, reports, and period-end reports to print using Paperless Office.
- How to e-mail or fax a paperless document to a vendor or customer

## Training Policies

How to Register:

- Email [training@goism.com](mailto:training@goism.com) to get started.
- We will send you a registration form to be faxed back as per instructions on the form.
- Once your registration and payment have been verified, you will receive a confirmation letter, receipt, and detailed information via email within 4 business days.
- For online offerings a course kit will be sent to you.

### **Full Day Classroom and Online Training Policies**

- Full day class cost (live and online) is \$395.00 per person, per day
- Payment must be made in advance. Reservations are not confirmed until tuition is received.
- Registration deadline for online courses is 1 week prior to class date.
- Once your registration and payment have been received, you will receive a confirmation letter, receipt, and detailed information via email within 4 business days.
- All classes are full, 8-hour day sessions.

**Please note: Online offerings are for Portland dates ONLY**

### **Classroom (in person):**

- Class is hands on, each student will be provided a machine and course materials
- Classrooms located in Portland, Phoenix, San Diego – location and directions will be sent at the time of registration.

### **Attend Online:**

- Class is taught live in Portland as you attend virtually from a computer in your office or home.
- Course kit including course materials, case study data files, and instructions will be sent to you.
- Webinar allows you to view the instructors screen.
- Audio connection direct to the classroom, other attendees and instructor.
- Interact with the MAS software for class exercises.
- Please note: Portland class dates only.

### **Cancellation Policy:**

All cancellation notices must be received at least 4 business days prior to the date of the registered class. Tuition is non-refundable for cancellations received within 4 business days of the scheduled class start date. Students may transfer tuition to another available class at any ISM location or online. Substitution of students is permitted at no additional charge.

ISM reserves the right to cancel classes. We will make every effort to reschedule student for the same class, however, if this is not possible, we will reimburse tuition in full. ISM assumes no responsibility for non-refundable airline or hotel expenses which may be incurred due to cancellation.