

iPOS Admin for SunSystems v4, v5 & v6

Duration: 2 Days – offered as customised training

Prerequisite: An understanding of the purchasing process and SunSystems. Knowledge of JET (Journal Entry Thin). Knowledge of Microsoft Windows Internet Explorer.

Who Should Attend: Purchase Order System Administrator and Purchasing Managers, who are also responsible for iPOS Administration.

What You Will Learn: At the completion of this training session participants will be competent in the following:

- Configuring the system profile and defining global settings e.g. Budget Checking, Printers, Periods etc.
- Creating users, groups and group profiles
- Creating approval groups, requisition and invoice approval matrices
- Creating posting rules, transaction rules and posting rule options as part of the Ledger Interface between iPOS & SunSystems
- Creating item records, catalogues and templates
- Supplier setup within iPOS and SunSystems
- Linking items to suppliers
- Locations setup
- Internal (delivery) addresses
- Discussions about XML matching and XML file outputs
- Understanding how the setup of the data in iPOS Administration has an effect on the iPOS Browser

Please see over page for course content

Course Content – iPOS Admin for SunSystems

Introduction and Overview

- Introduction to iPOS
- The iPOS Browser
- Logging into iPOS Admin
- Navigation

Working with Users, Groups and Group Profiles

- Introduction to users, groups and group profiles
- Create and define new iPOS users
- Creating user groups & profiles
- Defining requisition profiles
- Creating distributions
- Report folders

Working with Items

- Overview of items
- Defining units of measure
- Adding an item
- Linking an item to a supplier
- Creating & maintaining catalogues
- Creating & maintaining templates
- Item grouping
- Item analysis hierarchy & Q codes

Working with Suppliers

- Creating supplier records
- Grouping suppliers

Working with Addresses & Locations

- Addresses within iPOS
- Creating a delivery address
- Defining a default delivery address
- Grouping addresses locations

Managing the System Profile

- Global setting and the system profile
- The corporate address book
- Corporate email
- Accounts
- Custom labels
- Transaction analysis & analysis defaulting
- Workflow
- Period table
- Printer profiles

Managing the Approval Process

- The approval process
- The approval hierarchy
- Defining up approval groups
- Setting up requisition and invoice approval matrices
- Setting up administration authority matrices

Managing iPOS Postings

- Configuring the ledger interface between SunSystems and iPOS
- Creating posting rules, transaction rules and posting rule options
- Working with assets

iPOS Security

- User security
- Functional security

Multi Currency

- iPOS Multi Currency processing