

Xledger training courses

**Improving knowledge
and experience**



Our Ethos

Continuous learning around ERP solutions such as Xledger is an important factor for users and organisations in order to maintain knowledge and control of their systems.

Having confident users of any system ensures quality data entry and improved management information. Staff turnover quite often causes quality issues for an organisation and its management.

Basic training is the first step in understanding your system, in order to get maximum business benefit you need real training insight.

Overview

Williams Woodward offers a full range of training courses to help customers achieve the maximum benefit from your use of the Xledger product. Product training is an intrinsic part of the implementation process, and follow-on training ensures your organisation will continue to realise the benefits of Xledger as staff change roles and your organisation's requirements change.

A professional, structured approach delivers a high quality consistent training experience. Our documentation sets include; agenda, setup guide, user guide, course workbook (as appropriate), and our courses are delivered with our pre-populated databases.

Our Approach

The approach we take for product training is based on 'train the trainer' i.e. we train your Super Users to be self-sufficient in their use of Xledger. Training can be delivered at our offices in Maidenhead or at your premises, subject to suitable facilities. Electronic copies of the training material will be provided. The courses cover:

- Day to day operations
- Setup of master data
- Configuration and implementation considerations

End user training typically is tailored to a specific configuration of Xledger and should be based on your data and your internal processes. Williams Woodward is able to assist with the planning, production and delivery of end user training if required.

Course Catalogue

Course Name	Outline	Duration	Target Audience
Introduction and Initial Familiarisation	Personal settings, navigation, favourites, online help, notifications, overview of modules	0.5 Day	For all users of Xledger, getting to know the system, options for personalisation
Timesheets	Timesheet entry, timesheet codes, submitting timesheets, employee home page, using Xledger Touch	0.5 Day	For users who submit timesheets, either through the web browser or mobile devices
Expenses	Expense entry, submitting expenses, employee home page, using Xledger Touch	0.5 Day	For users who submit expense claims, either through the web browser or mobile devices
Project - Basic	Setting up projects and assignments, project documents, payment schedules, project invoicing, credit notes, resource planning, project budgets	1 Day	For project administrators / project managers responsible for setting up new projects and running the project invoicing process. Also for the implementation team to establish how Xledger will be used in their organisation
Project – Intermediate	Resetting invoice rows, pricelists and pricing, contacts, activities, posting timecosts, project reporting, creating new budgets, flexifields	1 Day	For project accountants responsible for project invoicing, cost calculations and reporting. Also for the implementation team to establish how Xledger will be used in their organisation and to understand the setup
Project – Advanced	Price discounts, access control, expense filters, income calculation, invoice rules, work schedules, setup of cost calculation	1 Day	For the implementation team to understand the initial setup of Xledger in their organisation
Accounting – Basic	Accounts payable – supplier invoice registration, payments, supplier setup; Accounts receivable – receipts, customer setup, matching Enquiries and reporting Bank – bank reconciliation	1 Day	For book keepers and accountants responsible for day to day AP, AR and cashbook. Also for the implementation team to establish how Xledger will be used in their organisation
Accounting – Intermediate	Journal entry, journal follow-up and corrections, multi-currency, periodisation, bank posting rules, customer groups and flexifields, write-offs, intercompany posting, reminders and debt collection, period end, revaluation, VAT returns, year end. GL reconciliation, chart of accounts, budgeting	1 Day	For senior book keepers and accountants responsible for corrections, setup and period end routines. Also for the implementation team to establish how Xledger will be used in their organisation
Accounting - Advanced	Workflow setup, opening balances, GL reconciliation, GL analysis setup, bank account setup, fixed accounts, special VAT treatment, setup collection codes, financial ratios	0.5 Day	For the implementation team to establish how Xledger will be used in their organisation
Invoicing – Basic	Ad-hoc sales invoices, stock invoices, credit notes, sales orders, invoice follow-up	0.5 Day	For book keepers and accountants responsible for the day to day invoicing processes. Also for the implementation team to establish how Xledger will be used in their organisation

Course Name	Outline	Duration	Target Audience
Invoicing – Intermediate	Invoice processing, products and pricelists, discount matrix, order templates, recurring invoicing, subscriptions, maintenance	1 Day	For senior book keepers and accountants responsible for maintaining the setup relating to invoices and for using more advanced invoicing functions. Also for the implementation team to establish how Xledger will be used in their organisation
Data import	Document import, Xledger scanner, file import, email import	0.5 Day	For the systems accountant responsible for importing data from external systems, and the domain administrator responsible for underlying setup
Financial Manager	Approving timesheets, expenses and invoices, workflow delegation, budget entry, reporting and financial dashboards	0.5 Day	For budget holders and managers with approval responsibility
Project Manager	Approving timesheets and expenses, workflow delegation, project invoicing, resource planning, project dashboard and project reporting	0.5 Day	For project managers and line managers with approval responsibility
Fixed Assets	Asset setup, asset groups and fixed accounts, opening balances, depreciation setup, depreciation posting, disposals, enquiries and reports	0.5 Day	For fixed asset accountants, responsible for maintaining the asset register, depreciation and setup. Also for the implementation team to establish how Xledger will be used in their organisation
Purchasing	Purchase orders, purchase order templates, GRNs, product master file, matching invoices to POs, PO enquiries	0.5 Day	For purchasing managers. Also for the implementation team to establish how Xledger will be used in their organisation
Inventory and Production	Setup of logistics module, stock transactions, bill of materials setup and production processing, inventory enquiries and reporting, setup fields, fixed accounts	1 Day	For inventory accountant. Also for the implementation team to establish how Xledger will be used in their organisation
System Admin / Super User	Setting up a new company, configuring the home page, user defined objects, new employees, new users and user roles, access control, activating GL analysis, entity setup fields, fixed invoice text and invoice HTML	0.5 Day	For the domain administrator, responsible for users, access and underlying setup. Also for the implementation team to establish how Xledger will be used in their organisation
Reporting	Enquiries and reports, financial statements, XRW Financials, XRW SO (invoice reports), XCUBE, pivot charts	0.5 Day	For financial and management accountants, system accountants and senior accounting users

Copyright Xledger Ltd, 2012. All rights reserved.

This document is the property of Xledger Ltd and may not be reproduced in whole or in part without prior written approval of Xledger Ltd.

The information contained in this document is intended only for the personal and confidential use of the clients of Xledger Ltd. The contents of any Xledger Training Documents or Publications are protected by the copyright laws of Norway, Sweden, United Kingdom, the United States and other countries. All rights not expressly granted are reserved.

Contact us at:

info@williamswoodward.co.uk

t/f +44 (0)1628 621664 **www.williamswoodward.co.uk**

The Summit, 2 Castle Hill Terrace, Maidenhead, Berkshire, SL6 4JP