

# = exact

And it all comes together.

## Exact JobBOSS

Training Course Catalog



# Contents

<b>Exact Americas Training Overview</b> .....	<b>3</b>
<b>Traditional Classroom Training</b>	
JobBOSS Job Control Complete 2-Day Classroom Training .....	4
Crystal Reports® XI Basic and Intermediate Workshop .....	4
Advanced Crystal Reports® 1–Day Workshop.....	4
<b>Virtual training</b>	
JobBOSS Track 1: Quote Processing.....	5
JobBOSS Track 2: Order Processing with Time Entry.....	5
JobBOSS Track 3: Scheduling.....	5
JobBOSS Track 4: Material Management.....	6
JobBOSS Track 5: Shipping, Services, Transfer, Closing.....	6
JobBOSS Track 6: Job Costing & Reporting.....	6
JobBOSS Accounting – Accounting Setup .....	7
JobBOSS Accounting – Accountants Recievable .....	7
JobBOSS Accounting – Accountants Payable & General Ledger .....	7
JobBOSS Data Collection – Automation for the Shop Floor .....	8
JobBOSS Sales Order Processing – Flexibility in Order Processing.....	8
JobBOSS ShopBOSS Scheduling Essentials.....	8
JobBOSS Tips and Tricks for the Experienced User.....	9
Crystal Reports® XI Introduction for JobBOSS Users .....	9
Crystal Reports® XI Intermediate .....	9
Crystal Reports® XI Advanced.....	10
Crystal Reports® XI Advanced Formulas .....	10
Foundations of Accessing JobBOSS Data .....	10
JobBOSS Reporting with Microsoft Office .....	11
Microsoft SQL Server Administration Introduction .....	11
JobBOSS Scheduling Workshop .....	11
JobBOSS Effective Material Management Workshop.....	12
JobBOSS Creative Report Writing Workshop.....	12

*\*All prices subject to change. This catalog represents currently available courses. Exact Americas reserves the right to alter the training curriculum and availability at any time.*

## Exact Americas Training

### Learning Pass is available for:

Exact JobBOSS®  
Exact Macola Progression®  
Exact Macola® ES  
Exact Synergy® Enterprise  
Exact Globe®

*“The [Exact] instructors are the best I’ve had in my career in business.”*

—Dave Law  
Purchasing Manager  
Michigan Ladder Company

### A Flexible Training Solution to Fit Every Company

With the majority of classes offered online, you and your staff could learn more effective and efficient ways of using your Exact product without incurring travel expenses or time out of the office. Additionally, all classes are conducted in an open communication environment, allowing you to share knowledge and gain insight from other Exact customers, and many courses utilize a virtual lab server, providing immediate hands-on experience.

Many customers still prefer the traditional method of training. While each classroom course represents up to five days of participation, classroom training remains one of the most effective vehicles for anyone seeking complete understanding of your Exact product.

### Learning Pass – Maximize Your ROI

Invest in your employees with this business-critical training and receive the highest return on your investment. With a Learning Pass Training Plan, you can send named license users, to online courses\*, any number of times, for one full year.

*\*Refer to the Learning Pass fact sheets for course information.*

Benefits of Exact Learning Pass including:

- Reduced reliance on internal “power users” to provide training
- Empowered users develop out-of-the-box thinking & create efficiencies
- Access to internet-based training courses
- Zero travel expense, minimal down-time and disruption
- Simplified budgeting and planning process to meet training needs
- Convenience of internet-based training in 2 to 4 hour sessions
- Ideal for new employees or employees in new roles

The Learning Pass Training Plan offers the most cost-efficient return on your investment with many seeing the plan pay for itself in just a few classes!

### Additional Course Catalogs

Find more product training in these catalogs: Exact Synergy, Exact Macola, Exact JobBOSS, Exact Additional Products

To learn more or to receive a free quote, contact your Exact sales rep, or visit us on Exact’s customer portal at <https://customers.exact.com>.



### Continuing Professional Education

Exact Americas is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the

**National Registry of CPE Sponsors,**

**150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417.**

**Web site: [www.nasba.org](http://www.nasba.org)**

## Traditional Classroom Training

### JobBOSS Job Control Complete 2-Day Classroom Training

#### Overview

JobBOSS 101. This hands-on comprehensive course introduces users to the entire core of JobBOSS Job Control modules. This course teaches the features, functions and how and when to apply them in your shop.

#### Who should attend this class?

Those users that have been newly hired at a business currently using JobBOSS. Those users that have just installed the JobBOSS software. Those users that currently use an older version of JobBOSS and are planning to upgrade to the current version

**Level:** Beginner

#### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control On-Demand lessons focusing on Job entry and Scheduling

#### Objectives:

- Understand the logical flow of creating quotes and job orders as well as basic scheduling techniques
- Understand the options that are available for allocating materials to jobs
- Complete time entries to allocate labor and machine costs to each job created
- Learn how to properly enter data for materials purchased and sent to outside service vendors
- Complete the cycle by shipping to customers and closing jobs that were created
- Understand how to analyze job data using job cost reports and how the costs were added to jobs

**Delivery Method:** Classroom-based

**Duration:** 14 hrs

**CPE Credits:** 14

**Cost:** \$895/student

### Crystal Reports XI Basic and Intermediate Workshop

#### Overview

This class will provide you with the foundation needed to create and manage reports using Crystal Reports® XI.

#### Who should attend this class?

Anyone who needs to learn the fundamentals of Crystal Reports

**Level:** Basic to intermediate

#### Pre-requisites:

Basic understanding of Microsoft® Windows

#### Objectives Day 1:

- Understand report design concepts
- Create a basic report
- Understand how to select records from your data source
- Develop report by sorting, grouping, and totaling
- Learn about text objects
- Understand how to format reports
- Determine the best way to distribute reports

#### Objectives Day 2:

- Know how to set default and report options
- Understand how to combine multiple tables
- Understand how to create and use formulas
- Learn how to apply conditional formatting
- Create summary reports and charts
- Learn how to export reports
- Utilize report wizards

**Delivery Method:** Classroom

**Duration:** 14 hrs

**CPE Credits:** 14

**Cost:** \$895/student

### Advanced Crystal Reports 1-Day Workshop

#### Overview

Start optimizing your skill in report customization with the addition of multiple tables. This 1 day workshop combines lecture, demonstration, and hands-on practice exercises.

#### Pre-requisites:

- Basic understanding of Microsoft Windows
- Either successful completion of the Crystal Intermediate class or the ability to write advanced Crystal reports.

#### Objectives:

After completing this workshop you should be able to:

- Understand report design concepts
- Create a basic report
- Understand how to select records from your data source
- Develop report by sorting, grouping, and totaling
- Learn about text objects
- Understand how to format reports
- Determine the best way to distribute reports

**Delivery Method:** Classroom

**Duration:** 7 hrs

**CPE Credits:** 7

**Cost:** \$495/student

## Virtual Training

### JobBOSS Track 1: Quote Processing

#### Overview

Let JobBOSS calculate the price you should be charging for your parts. Learn the basics on how to create a quick quote or a full quote from scratch. This course covers all data entry functions and reporting that is necessary for being successful with implementing quoting within your shop. This course also includes a hands-on lab to directly apply the information learned.

#### Who should attend this class?

Those users responsible for generating customer quotes; Estimators, Sales Representatives and Order Entry Staff.

**Level:** Beginner

#### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control System Administration Module On-Demand lessons

#### Objectives:

- Understand basic Preferences needed to start quoting
- Learn how to create a quick quote to start tracking your quotes in JobBOSS today
- Enter a full quote from scratch including routings and materials needed
- Modify quotes and quantities based on price breaks and efficiencies
- Understand key quoting reports used to support quoting
- Learn how to follow-up and maintain quotes for accurate tracking and customer communication

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

### JobBOSS Track 2: Order Processing with Time Entry

#### Overview

Accurate order entry is the key ingredient to accurate visibility to customer open orders. In this course you will learn how to create a new job from scratch including routings and materials. This course also covers how to copy from previous jobs and/or quotes and discusses how to effectively use time and material jobs and template jobs. This course will then show how to post accurate labor and machine costs to the job to support costing and scheduling of your labor.

#### Who should attend this class?

Those users responsible for entering and maintaining customer orders including Estimators, Order Entry Staff, Schedulers, and Shop Owners/Managers.

**Level:** Beginner

#### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control System Administration Module On-Demand lessons

#### Objectives:

- Understand basic Preferences needed to start Job Entry
- Learn how to create a quick job to start tracking your orders in JobBOSS today
- Enter a full job from scratch including routings and materials needed
- Understand how ShopView and ShopStats are used to support your orders
- Discuss how to create time and material jobs
- Learn the importance of template jobs and part masters for efficient data entry for repeat part orders
- Enter time entry transactions for employees working on jobs to track costs and scheduling time

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

### JobBOSS Track 3: Scheduling

#### Overview

Let's start scheduling in JobBOSS. Learn the basic settings and functionality necessary to be successful at scheduling your shop in version 11 and higher. This course also includes a hands-on lab to directly apply the information learned.

#### Who should attend this class?

Those users responsible for scheduling jobs in their shop, such as Production Planners/Schedulers, Shop Supervisors and Managers.

**Level:** Beginner

#### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control System Administration Module On Demand Lessons

#### Objectives:

- Understand basic JobBOSS Scheduling rules
- Learn which preferences are required for scheduling
- Enter and maintain shifts for scheduling purposes
- Create, update and maintain work centers including assigning shifts to calculate resource capacity
- Learn about added features such as the Projected Delivery function and Release Date field
- Learn about the new Affects Scheduling function
- Schedule all jobs in your shop using Global Scheduling
- Review and understand key Shop Floor Reports

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Track 4: Material Management

### Overview

Got inventory? Gain a better focus on implementing and managing your company inventory system using reorder points, planning functionality and history reporting.

### Who should attend this class?

Those users responsible for purchasing and maintaining material inventory such as Material Managers and Buyers.

**Level:** Beginner

### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control System Administration Module On-Demand lessons

### Objectives:

- Create Raw Stock and Other material master files
- Understand how to classify materials
- Set reorder points and quantities
- Use Inventory Adjustments and Transfers correctly
- Use Material Planning to effectively manage inventory
- Purchase and Issue Inventory
- Understand history reports for purchasing and forecasting

**Delivery Method:** Internet-based

**Duration:** 4 hrs

**CPE Credits:** 4

**Cost:** \$400/student

## JobBOSS Track 5: Shipping, Services, Transfer, Closing

### Overview

Last phase of your job flow includes dealing with Outside Services, shipping your parts, transferring any extras to inventory and lastly actually closing your job and reviewing reports. In this class you will cover all data entry and reporting used to support all four of those functions.

### Who should attend this class?

Those users responsible for shipping to outside services and/or customers, users who deal with the closing of the job including the costing of parts and transferring of finished parts to inventory.

**Level:** Beginner

### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control System Administration Module On-Demand lessons

### Objectives:

- Create all documentation for Outside Service tracking including purchase order and packlist
- Learn how to create customer packlists and understand how to track over-shipments and backorders
- Discuss the foundation and costing for transferring finished goods to inventory
- Review job costing reports to maintain your accurate data on your job
- Close your job once all transactions are posted
- Review final reporting

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Track 6: Job Costing and Reporting

### Overview

Gain control of your data and the flow of costs throughout the system. This course will help you understand costing and the content of data on the JobBOSS Financial Analysis Reports.

### Who should attend this class?

Those users that will be responsible for reconciling monthly Work In Process, Cost of Goods Sold and Scrap reports, such as Accountants, Controllers and Chief Financial Officers.

**Level:** Intermediate

### Pre-requisites:

- Basic understanding of the Job Control and Accounting modules

### Objectives:

- Understand the flow of data throughout the sub-reports within the Financial Analysis report
- Get a true understanding of the work in process, cost of goods sold, scrap, and transfers costing
- Understand what business decisions should be made based on the Financial Analysis reporting

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Accounting Setup

### Overview

This hands-on training will help to start the implementation of the accounting modules off on the right foot. Learn the setup requirements and processes needed for a smooth transition from your current accounting system to JobBOSS.

### Who should attend this course?

Those users that will be accessing the accounting modules on a daily basis, such as AP/AR Clerks, Accountants, Controllers and Credit Managers.

**Level:** Beginner

### Pre-requisites:

- JobBOSS Accounting and Navigation On-Demand lessons

### Objectives:

- Setup of a functional chart of accounts
- Enter data into customer and vendor master files to make daily transactions easier
- Enter your beginning balances for AR, AP and GL for your go live

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Accounts Receivable

### Overview

This hands-on training course will teach you the daily transactions necessary for using Accounts Receivable with JobBOSS. This includes customer invoicing, customer deposits, and adjustments.

### Who should attend this course?

Those users that will be accessing the accounting modules on a daily basis, such as AR Clerks, Accountants, Controllers and Credit Managers.

**Level:** Beginner

### Pre-requisites:

- JobBOSS Accounting and Navigation On-Demand lessons

### Objectives:

- Enter a variety of customer invoices including prepayments and progress payments
- Enter and understand the difference between credit memos and adjustments
- Enter customer and GL cash receipts to your bank accounts
- Post transactions and Accounts Receivable reporting

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Accounts Payable and General Ledger

### Overview

This hands-on training course will teach you the daily transactions necessary for using Accounts Payable and the General Ledger with JobBOSS. This includes vendor invoicing and check writing. And General Ledger journal entries, bank reconciliation and month-end closing procedures.

### Who should attend this course?

Those users that will be accessing the accounting modules on a daily basis, such as AP Clerks, Accountants, Controllers and Credit Managers.

**Level:** Beginner

### Pre-requisites:

- JobBOSS Accounting and Navigation On-Demand lessons

### Objectives:

- Enter a variety of vendor invoices both to be applied against jobs and without
- Create computer check runs and process manual checks
- Accounts Payable Adjustments vs processing debit memos
- Posting and Reports for AP
- General Ledger journal entries
- Bank reconciliation
- Month-end closing procedures

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Data Collection- Automation for the Shop Floor

### Overview

Gain visibility into current activity on your shop floor, eliminate data entry errors, and respond to changes immediately with data collection. This course teaches the setup, features and functionality necessary to control the data on your shop floor.

### Who should attend this class?

Those users that will be responsible for setting up the JobBOSS Data Collection module, and those users that will be responsible for day to day data entry or training users how to use the JobBOSS Data Collection module. These users would include System Administrators, Shop Managers/Supervisors and Office Managers.

**Level:** Beginner

### Pre-requisites:

- Basic understanding of the Job Control modules including Employee master files, Job entry and Time entry

### Objectives:

- Understand how to enter and maintain shifts including rules for each shift
- Collect information faster by giving employees permission to transactions in Data Collection
- Eliminate hard-to-read handwritten shop cards and time tickets by entering information directly into the JobBOSS Data Collection system
- Streamline auditing, correcting and reporting of Data Collection transactions

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Sales Order Processing – Flexibility in Order Processing

### Overview

Enhance your order processing for orders with multiple parts, deliveries and high repeat work. Whether orders are filled by making the part, shipping from stock or re-selling an item from another supplier, this course will show you how to control all of these options with the use of Sales Orders. You will then see how to tie these Sales Orders directly to jobs and purchase order to streamline your process.

### Who should attend this class?

Those users that will be using the Sales Order entry application, such as Order Entry personnel, Sales Team members and Office Managers.

**Level:** Beginner

### Pre-requisites:

- JobBOSS Navigation On-Demand lessons

### Objectives:

- Create multiple jobs from one sales order or link a sales order to an existing purchase order
- Learn how to access historical sales information while adding a new customer order
- View on-line item status information of what is on order or in production
- Enter and use up to three different pricing structures for customer orders

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS ShopBOSS Scheduling Essentials

### Overview

ShopBOSS is your key to scheduling. Learn to manage your shop schedule, change shop resources on the fly to drive a true production plan and make critical decisions using the information displayed in ShopBOSS. Have visibility into the production schedule and employee availability. This course also includes a hands-on lab for direct application of what you learn.

### Who should attend this class?

Those users responsible for scheduling jobs in their shop that have purchased and installed the ShopBOSS module, such as Production Planners/Schedulers, Shop Supervisors and Managers.

**Level:** Intermediate

### Pre-requisites:

- JobBOSS Navigation On-Demand lessons
- JobBOSS Job Control On-Demand lessons focusing on Job entry and Scheduling
- Users should also have attended the Schedule It Right training class

### Objectives:

- Create and understand the Parent/Child work center relationship and functionality
- Understand finite scheduling vs. infinite scheduling
- Set ShopBOSS preferences and options to maximize the module for your shop
- View your current workload vs. capacity using Shop Overview
- Become familiar with Work Center and Job Zoom functions and features
- Have access to key stats using the ShopBOSS Dashboard
- Create employee work assignments from ShopBOSS so employees know what jobs to work on
- Review and understand key Shop Floor Reports

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Tips and Tricks for the Experienced User

### Overview

Ready to take JobBOSS beyond the basics? The course introduces advanced features and functions not covered in any of the other JobBOSS Training classes. The course also includes tips and tricks as well as best practices. This course also includes a hands-on lab.

### Who should attend this class?

Any user that would like to learn additional features and functions in JobBOSS.

**Level:** Intermediate/Advanced

### Pre-requisites:

- Users should be proficient in JobBOSS and understand all aspects of the software that they have purchased and have installed. Users taking this class should be using most of the core JobBOSS modules.

### Objectives:

- Learn additional features and functions in the core JobBOSS modules
- Create ShopAlerts
- Use Microsoft Access to create queries to the database to create ShopAlert Views
- Learn keyboard shortcuts
- Develop best practices for closing jobs and collecting indirect labor time
- Learn additional report and best practice tips to apply to the JobBOSS program

**Delivery Method:** Internet-based

**Duration:** 6 hrs

**CPE Credits:** 6

**Cost:** \$600/student

## Crystal Reports® XI Introduction for JobBOSS Users

### Overview

Calling all new users to Crystal Reports. This course will introduce users to Crystal Reports formatting basics that are needed to create professional, easy-to-read reports. Learn to create simple reports using your own JobBOSS database. Users will also learn to create a new data source connection from scratch.

### Who should attend this class?

Those users that would like to create new reports using JobBOSS data.

**Level:** Beginner

**Pre-requisites:** None

### Objectives:

- Install tools that will assist users in learning the JobBOSS tables, fields and field types
- Link to the JobBOSS database to access information
- Define and layout a simple custom report using one table
- Create reports with specific selection criteria built into the report
- Add reports to the JobBOSS menu for easy access

**Delivery Method:** Internet-based

**Duration:** 6 hrs

**CPE Credits:** 6

**Cost:** \$595/student

## Crystal Reports® XI Intermediate

### Overview

Continue your Crystal education using multiple tables and additional functionality to add more information to custom reports. This class will use the connection to the sample database that was created in the Intro Class.

### Who should attend this class?

Those users that want to create more complex reports using multiple database tables.

**Level:** Intermediate

### Pre-requisites:

- Users attending this class should have attended the Introduction to Crystal reports class or have completed the equivalent qualifying exercise. Users that skipped the Intro class must understand how to create a connection to the Xtreme Sample database that will be used in this class. This sample database can be obtained from the Crystal website at [www.businessobjects.com](http://www.businessobjects.com).

### Objectives:

- Create custom reports using multiple tables
- Introduce table linking options and definitions
- Add flexibility to custom reports with formulas using existing report fields as well as fields that are not displayed on the report
- Create reports containing sub-reports (drill downs)
- Create reports with charts
- Learn how to copy an existing JobBOSS report
- Learn how to modify a JobBOSS report by adding, removing or suppressing a field

**Delivery Method:** Internet-based

**Duration:** 6 hrs

**CPE Credits:** 6

**Cost:** \$595/student

## Crystal Reports® XI Advanced

### Overview

Take your knowledge of the Crystal Report Writer XI deeper with this advanced course. Further continuing the Crystal Report series, you will learn how to take your custom reporting to the next level through multiple tables and additional functionality.

### Who should attend this class?

This class is for those needing to develop more complex Crystal reports.

**Level:** Advanced

### Pre-requisites:

- Basic understanding of Microsoft Windows
- Either successful completion of the Crystal Intermediate class or the ability to write advanced crystal reports.
- Users that skipped the Intro & Intermediate class must understand how to create a connection to the Xtreme Sample database that will be used in this class. This sample database can be obtained from the Crystal website at [www.businessobjects.com](http://www.businessobjects.com).

### Objectives:

- Format Multiple Sections
- Use Running Totals
- Use Prompting with Parameters
- Use Sub-reporting as a workaround solution
- Create Powerful Groups
- Work with Cross Tabs

**Delivery Method:** Internet-based

**Duration:** 6 hrs

**CPE Credits:** 6

**Cost:** \$595/student

## Crystal Reports® XI Advanced Formulas

### Overview

Take your knowledge of the Crystal Report Writer XI deeper with this advanced course in the use of formulas. Further continuing the Crystal Report series, you will learn how to take your custom reporting to the next level through advanced formulas to present the data you want to present.

### Who should attend this class?

This class is for those needing to develop a better understanding of the use of Formulas within a Crystal Report.

**Level:** Advanced

### Pre-requisites:

- Basic understanding of Microsoft® Windows
- Either successful completion of the Crystal Reports XI Advanced class or the ability to write advanced Crystal reports.
- Users that skipped the Introduction & Intermediate class must understand how to create a connection to the Xtreme Sample database that will be used in this class. This sample database can be obtained from the Crystal Reports website at [www.businessobjects.com](http://www.businessobjects.com).

### Objectives:

- Understand how Crystal Reports processes data
- Understand the background process Crystal Reports uses when it creates a report
- Understand which evaluation period to apply to run a formula
- Learn how to declare variables, assign values to them and use them within a formula
- Utilize multiple statements in complex formulas
- Manipulate arrays containing multiple values
- Review conditional statements
- Use multiple if then else Statements
- Understand the formula evaluation time debugger

**Delivery Method:** Internet-based

**Duration:** 4 hrs

**CPE Credits:** 4

**Cost:** \$395/student

## Foundations of Accessing JobBOSS Data

### Overview

This 3 hour course is designed to teach users not only how to access JobBOSS data but to also assist users in understanding the data, field relationships, how to extract data quickly and easily.

### Who should attend this course?

Anyone that uses JobBOSS and would like to extract data using queries or creating customized reports.

**Level:** Beginner

### Prerequisites:

- Basic understanding of JobBOSS

### Objectives:

- Learn to how to install and access the JobBOSS Database Schema
- Learn how to use the DB Schema to find tables and fields
- Learn how to install and access Jbudrpt.mdb
- Understand how to use the Jbudrpt.mdb to find fields, data and create quick queries of JobBOSS data
- Understand field relationships from one table to another as well as how to link fields
- Learn how and when tables are populated
- Understand tables and what each one is used for. Example: Source table and User Values

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## JobBOSS Reporting with Microsoft Office

### Overview

Extract information from the JobBOSS database by using Microsoft Excel, Access and Word to create queries and other documents. Users will also learn about ShopAlert Views in this class

### Who should attend this class?

Those users that would like to learn how to formulate queries, basic reports, and ShopAlerts with JobBOSS data.

**Level:** Intermediate

### Pre-requisites:

- Users should understand the basics of Microsoft Excel, Word, and Access

### Objectives:

- Export a JobBOSS report to Excel
- Create a Macro to modify JobBOSS Reports
- Create an Excel report from scratch with JobBOSS data
- Create pivot tables and graphs with selected data
- Make mailing labels and letters with Excel and Word
- Create an Access query with JobBOSS data
- Create a ShopAlert using the Access query

**Delivery Method:** Internet-based

**Duration:** 3 hrs

**CPE Credits:** 3

**Cost:** \$300/student

## Microsoft SQL Server Administration - Introduction

### Overview

This course will teach the basic administrative processes that all users of a Microsoft SQL Server based software should know. It is not designed to provide detailed knowledge of the inner workings of the Microsoft SQL Server database engine. It is intended to introduce the attendee to the most important concepts and operations of the SQL Server with a focus on Backup and Restore.

### Who should attend this class?

Anyone who hasn't had previous training on a Microsoft SQL Server and is responsible for the administration of it.

**Level:** Introductory

### Pre-requisites:

- A basic familiarity with the Windows environment is a must. Having some knowledge of computer networking is helpful, but not necessary.

### Objectives:

- Learn what SQL Server is
- Learn how the SQL Server stores and organizes data
- Learn how SQL Server works with user permissions
- Learn how to protect SQL databases with Backup and Restore
- Learn how to re-index your tables and defragment the files
- Conduct a few simple exercises to gain experience with the material presented

**Delivery Method:** Internet-based

**Duration:** 2 hrs

**CPE Credits:** 2

**Cost:** \$295/student

## JobBOSS Scheduling Workshop

### Overview

Learn how to setup JobBOSS to create capacity for scheduling and manage your schedule using ShopBOSS.

### Who should attend this course?

Those users responsible for scheduling jobs in their shop, such as Production Planners/ Schedulers, Shop Supervisors and Managers.

**Level:** Beginner/Intermediate

### Pre-requisites:

- Users should be comfortable with basic JobBOSS navigation and job creation.
- Users should have attended all Job Control On Demand lessons prior to attending this workshop.

### Objectives for 1st half of class:

- Understand basic JobBOSS Scheduling rules
- Understand infinite scheduling
- Enter and maintain shifts for scheduling purposes
- Create, update and maintain work centers including assigning shifts to calculate resource capacity
- Learn about added features such as the Projected Delivery function and Release Date field
- Learn about the new Affects Scheduling function
- Schedule all jobs in your shop using Global Scheduling
- Review and understand key Shop Floor Reports

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#### Objectives for 2nd half of class:

- Create and understand the Parent/Child work center relationship and functionality
- Understand finite scheduling
- Set ShopBOSS preferences and options to maximize the module for your shop
- View your current workload vs. capacity using Shop Overview
- Become familiar with Work Center and Job Zoom functions and features
- Have access to key stats using the ShopBOSS Dashboard
- Create employee work assignments from ShopBOSS so employees know what jobs to work on

**Delivery Method:** Classroom

**Duration:** 7 hrs

**CPE Credits:** 7

**Cost:** \$495/student

## JobBOSS Effective Material Management Workshop

#### Overview

Got inventory? Gain a better focus on implementing and managing your company inventory system using reorder points, planning functionality and history reporting.

#### Who should attend this course?

Those users responsible for purchasing and maintaining material inventory such as Material Managers and Buyers.

**Level:** Intermediate

#### Pre-requisites:

- Basic understanding of the JobBOSS core functionality and navigation.

#### Objectives:

- Create Raw Stock and Other material master files
- Understand how to classify materials
- Set reorder points and quantities
- Use Inventory Adjustments and Transfers correctly
- Use Material Planning to effectively manage inventory
- Purchase and Issue Inventory
- Understand history reports for purchasing and forecasting

**Delivery Method:** Classroom

**Duration:** 7 hrs

**CPE Credits:** 7

**Cost:** \$495/student

## JobBOSS Creative Report Writing Workshop

#### Overview

Are you looking for a better way to report out of JobBOSS? JobBOSS offers a variety of reporting methods, and this session is designed to help you expand your JobBOSS reporting capabilities by covering all options that you have for creating JobBOSS reports. The following programs will be provided for you to learn the techniques and functions available. Additionally, you will learn about tools you can download from the Customer Portal to assist attendees in learning the JobBOSS database structure.

#### Pre-requisites:

- Basic understanding of Microsoft Windows
- Basic understanding of JobBOSS modules

**Reports will be created in: Microsoft Excel, Microsoft Access and Crystal Reports**

#### After completing this workshop you should be able to:

- Access tools necessary to understand where your data comes from
- Access the JobBOSS database using multiple programs (see list above)
- Create custom spreadsheet reports in Microsoft Excel
- Create custom queries in Microsoft Access
- Use basic Crystal functions to create professional easy to read reports
- Access the reports or queries that you create from JobBOSS

**Delivery Method:** Classroom

**Duration:** 7 hrs

**CPE Credits:** 7

**Cost:** \$495/student

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