

2009 UNITI-EAST - TRAINING CLASS

Monday, September 14, 2009
8:30 am – 4:30 pm

Expedite

- General recommendations
- Correcting and Creating Forms
- Streamlining Processes
- Form and other paperwork Reduction Processes
- New release Features
- Inter-connectivity with core

APS 3.0 Overview

- Functionality differences from Mainframe version
- Reporting differences and how to building SQL Reports
- Adding, Changing and Deleting Vendors
- Payables - Additions, Changes and Deletions
- Internal and External ACH Payables
- Review, Approval and Review Renumbering
- Reversible transactions
- Inter-connectivity with CRS
- ACH Credit Advices

Viewpoint

- Basic reporting - selecting fields, overview of fields and how they work
- Exporting to Excel or another database
- Advanced Reporting
- Adding formulas and totals to reports
- Building a Portal - Creating a report portal for easy access to information
- Scheduling Jobs, when to do it and how it works
- Report migration recommendations

2009 UNITI-EAST - TRAINING CLASS

Tuesday, September 15, 2009
8:30 am – 4:30 pm

Director Configuration, Operation, Administration & End User Training

- Download options and recommendations
- Auto Parsing
- Document Type Group and Document Types for ease of end user retrieval
- Analysis of Documents, Last Review Date, Notes Placed and more
- Report Activation & Deactivation, Printing, Keywords, Auto Naming and more
- Security and Document Groups and End User assignment
- Features, Functions and How to establish Queries
- Report and Image Cross Referencing
- Creating resulting Reports from one or several Reports
- Saving Reports into another file for Import into Excel or other program
- Bringing Reports into Excel for further breakdown or reporting

Overview of Premier 2008 Release

- Project Recommendations
- Verifying Pre-requisite items
- Preparatory procedures and other considerations
- Upgrade Instructions
- Review of New Features and New Feature Implementation
- Other considerations and recommendations
- Post upgrade