Mastering Sage X3

Consultant Enablement Program – Core Learning

Contents

Program Overview

How to Use This Document

Sage has produced this document to ensure its Partners and Internal Colleagues are clear on all aspects of the Core Learning within the Mastering Sage X3 Program.

The document will be revised on an ongoing basis and made available on the Mastering Sage X3 Website and through the Program Leads.

Program Overview

The Mastering Sage X3 (MX3) Program is a consultant enablement learning program which provides product knowledge up to an expert level alongside implementation methodology best practice, to support you to become a proficient Sage X3 Implementation Consultant or Project Manager.

With hands-on interactive exercises, you will learn the core functionality, processes, capabilities and configurations of Sage X3.

This foundation prepares you to apply that knowledge, bring it together and work in project teams to configure a solution with real-world case study business requirements.

Following the core training we recommend a short break to digest the information and use the product in a live scenario before undertaking the Advanced classes.

These classes will build upon the core knowledge gained to ensure all delegates have a deeper understanding of the common tools before focusing upon their chosen specialism.

Advanced Topic Workshops are available for Technical, Financial, Distribution and Manufacturing consultants, which will take you to a higher level of knowledge and confidence.

If you are a Project Manager, you'll attend the PM workshop to learn the Sage Implementation Methodology and best practice for a successful project implementation.

To complement your learning, you should continue your development through on the job shadowing, working with mentors in your organization, attending further specialism courses through Sage University, and self-study in preparation for completing the Sage X3 certifications.

After gaining the relevant product certifications for your role and have more than one year of practical implementation experience, you will return to the classroom to attend the Expert workshop in your chosen field.

Program at a Glance

The stages of the full program are shown below.

Mastering Sage X3 Bootcamp		
Sage University (Sage U)	Instructor Led Virtual or Classroom	Instructor Led - Classroom

Getting Started	Core Learning	Advanced Learning	Expert Learning
An introduction to the basic functions and operations of the application. Such learners should be considered competent enough to begin to perform their role or competency.	Learners who complete the Core Curriculum should be considered **ready to fulfil the everyday duties** of their role or competency with minimum assistance or supervision.	The **ultimate level** of learning, though it should be stressed that learning is the cornerstone of expertise. Only experience can make a true expert.	Designed to enable you to **master** your skills in your chosen specialist domain. These courses are aimed at consultants who have significant Sage X3 knowledge and expertise.

Details of the **Core learning** courses are outlined in this document. To find out more about the Advanced and Expert courses, please refer to the guides specific to those stages.

Why attend?

Customer success starts with people, processes and tools to implement their solutions. Our ecosystem is growing fast, but it needs to grow faster with qualified people.

You will participate in a focused, condensed program which will reduce your preparation time in becoming a billable contribution on customer implementations.

You'll learn the core product functionality in an interactive environment gaining a foundation of Sage X3 knowledge.

You'll work within a project team to configure the solution using real world case studies to simulate being on a customer implementation project.

You will grow your network by forming working relationships with peers in your field in a collaborative and sharing learning event.

Learn best practice and implementation methodology for working effectively on projects from Sage experts.

We recognise that learning doesn't just stop. After gaining practical implementation experience out in the field, you will periodically return to the classroom to enhance your knowledge to an Expert level

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Who should attend the MX3 Core Training?

- New and junior Sage X3 consultants.

- Project Managers or Sage X3 consultants with less than two years' experience.

- Current consultants who haven't had formal Sage X3 training and certification or need a refresher.
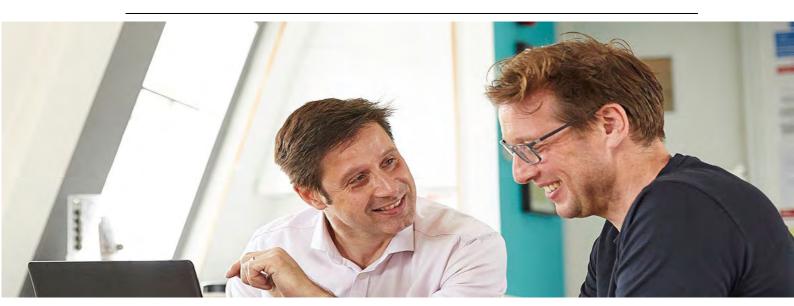

What you will learn during your Core Training

This is an intense consultant enablement and learning program which will provide you with awareness of the Sage X3 market, core technical, financial and product knowledge alongside implementation methodology best practice

Key Benefits

Attract new talent	Offering training for new consultants is a key feature many people look for within their job search.
Reduction in training time and costs	Consultants will be immersed in the product alongside practical experience, rather than staggered traditional learning methods.
Faster time to becoming a billable consultant	Results from past bootcamp attendees show faster ramp up times compared to traditional learning methods.
Increased staff engagement	Continuous learning and recognition to support ongoing personal development
Increased company profile	Increase your company profile with a pool of trained, motivated and certified Sage X3 consultants.
Improve customer experience and reduce risk	Learn how to deliver your projects consistently, quicker and realise the benefits sooner.
Grow the Sage X3 Community	Broaden your knowledge and share experience within the Sage X3 community.

Program Summary

The program has been designed in a very flexible way to accommodate a range of business needs.

The information below provides a summary of each of the classes to allow you to identify which are relevant for your consultant(s).

Core Technical	Delegates will learn how to successfully install Sage X3 including system hardware and server considerations.
	You will learn the System Administrator functions, concepts, tools and functions common to all Sage X3 modules.
	Once the course is completed delegates will be able to install Sage X3 and patch the application, configure basic security, create/edit navigation and landing pages, create custom queries and process flows, and configure the basic technical settings of the application.
Core Financials	Delegates will learn how to get started with the financial functionality of Sage X3 by setting up a new company based on a defined case study.
	Delegates are required to complete 8 ½ hours of eLearning courses that will provide the necessary information to understand key Financials functions and the skills to complete the case study labs in the instructor-led training. The required pre-work is automatically added to your transcript in Sage University upon successful registration.
	Throughout this training, you will learn the general ledger account structure and transactions, an overview of common accounts receivable and payable processes, and basics of financial reporting capabilities.
	Upon completion of the class, additional post-work eLearning will be added to your transcript to complete the Core Financials course. By the end of the course delegates will be able to set up an out of the box client account system and undertake customization.
Core Distribution	This course follows Core Financials in which delegates will learn common set up and transactions of the stock management, purchasing, and sales processes in Sage X3.
	You will learn how to set up stock and manage inventory, customer transactions for sales and supplier purchasing. This will include price set up, ordering, delivery, invoicing, and any miscellaneous transactions associated with stock management.
	By the end of the course delegates will be able to run warehouses, purchasing and sale of stock from suppliers and to customers.

Configuring the Solution

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

Using actual customer implementation scenarios, you will work within a project team to review and make decisions to best configure the system and meet the needs of your client.

This workshop is very interactive with assigned tasks and discussion points with the instructor and other attendees to share approaches and outcomes.

During the course delegates will gain confidence and proficiency having worked through real life examples with their peers and being provided with best practice advice and support.

The workshop serves to reinforce prior learning and to introduce the implementation process. By the end of the course delegates will be able to describe the basic stages of Sage X3 implementation.

Project Manager Workshop

This event provides delegates with a thorough understanding of the expectations of a Project Manager.

Attendees will learn and practice the Sage STREAM Implementation Methodology across the full project lifecycle preparing them for their role.

Delegates will gain a clear understanding of how to set client expectations and become familiar with the tools and documentation used.

Extended Learning

High level information related to the additional training courses available sitting outside of the Mastering Sage X3 program is provided within this guide

Onsite Development and Practical Experience

Continue your learning through on the job shadowing. Delegates should work with an assigned mentor within your organisation and self-study in preparation for completing the Sage X3 certifications.

By the end of this period it is expected that they will be confident, certified Sage X3 Consultants and will be billable on project work. Project work should be organised and in place for you after completion of your core training. Putting into practice what you learned will cement your understanding of the product.

Core Technical

This interactive course will enable delegates to learn how to successfully install Sage X3 including system hardware and server considerations.

Delegates will learn the System Administrator functions, concepts, tools and functions common to all Sage X3 modules.

Once the course is completed you will be able to install Sage X3 and patch the application, configure basic security, create/edit navigation and landing pages, create custom queries and process flows, and configure the basic technical settings of the application.

Pre-Requisites

- Introduction to Sage X3 and Market
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data
- Getting Started with the Cloud

What you will learn

Subject	Learning Outcome
Sage Services Organization An introduction to Sage X3 Implementation Methodology	Demonstrate a basic understanding of the Sage implementation methodology.
Preparing for an install How to install the solution How to set up the SEED folder	Install Sage X3 and all components. Identify hardware requirements. Set up the SEED folder.
Patching Monitor and key settings Basic security and endpoint/global user set up Working with the batch server	Maintain and update the installation including installation of patches. Set up and manage basic security. Enter, set up and monitor batch jobs. Monitor users and sessions.
Collaboration functions Authoring functions Managing Tables and Data Setting up Report Codes	Create menus and users. Work with data conversions. Understand the report dictionary and how-to setup printing destinations. Use the collaboration tools for global document storage. Use the authoring functions to create and edit pages.

Entry Transactions	Create/edit entry transactions and create custom sequence numbers.
Sequence Numbers	
Importing and Exporting Data	Work with imports and exports.
Configuring Workflow Notifications	Apply common tools used throughout the product.
User-Defined Queries	
	Create Custom Fields and Tables.
	Create business processes within Landing Pages, Authoring pages, and Object personalization's.
	Create workflow notifications to monitor the application and alert users.

Extended Learning

To prepare you for the Advanced Training, it is recommended that Technical Consultants attend the **Introduction to Requestors and Workflows** course

Core Financials

In this course delegates will learn how to get started with the financial functionality of Sage X3 by setting up a new company based on a defined case study.

Delegates are required to complete 8 ½ hours of eLearning courses that provide you with the necessary information to understand key functions for Financials as well as the skills necessary to complete the case study labs in the instructor-led training. The required pre-work is automatically added to your transcript in Sage University upon successful registration.

Throughout this training, you will learn the general ledger account structure and transactions, an overview of common accounts receivable and payable processes, and basics of financial reporting capabilities.

Upon completion of the class, additional post-work eLearning will be added to your transcript to complete the Core Financials course. By the end of the course you will be able to set up an out of the box client account system and undertake customization.

Pre-Requisites

- Introduction to Sage X3 and Market
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data
- Getting Started with the Cloud
- Financials Consultant Course: Pre-Work (ESSENTIAL)

What you will learn

Subject	Learning Outcome
How to build a chart of accounts	Set up financial system and enter general ledger journal entries.
How to set up analytical accounting	
How to set up Ledgers, Companies, and Sites	
How to enter general ledger transactions	
How to set up and configure taxes	
How to set up and define AP AR system	Set up an accounts payable and receivable system.
How to set up bank accounts and check books	Set up a bank account
How to enter Business Partners	
Learn Automatic accounting principles	

Setup employee expenses	Able to set up employee expenses and perform processes
Fiscal years, periods and entering beginning balances	
Enter open items	
Perform bank reconciliations	Perform bank reconciliation tasks e.g. bank reconciliation, reconciling bank entries, cheques, electronic bank transfers and printing a reconciliation report.
How to perform fiscal year closings	
How to create financial reports	
	Build and run financial reports.
Generate paper and electronic payments	Able to generate payments
Perform daily and monthly transactions customer and supplier invoices, employee expenses and journal entries)	Able to perform regular transactions and processing
Perform month end processing	

Extended Learning

To prepare you for the Advanced Training, it is recommended that Financial Consultants attend the following courses: -

- **Understanding and Creating Workflows**
- **Auto journals**

Core Distribution

In this course you will learn common set up and transactions of the stock management, purchasing, and sales processes in Sage X3.

You will learn how to set up stock and manage inventory, customer transactions for sales and supplier purchasing. This will include price set up, ordering, delivery, invoicing, and any miscellaneous transactions associated with stock management.

By the end of the course you will be able to run your warehouses, purchasing and sale of stock from suppliers and to customers.

Pre-Requisites

- Introduction to Sage X3 and Market
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data
- Getting Started with the Cloud
- Using the Solution: Distribution

What you will learn

Subject	Learning Outcome
Inventory overview How to set up stock How to set up warehouse/site locations How to set up products How to enter stock movement transactions	Create multiple sites and functions for stock and manufacturing management.
How to perform stock changes How to perform periodic processing How to perform physical stock counts How to perform statistical reordering Introduction to MRP processes	Generate a stock count list. Release inventory and validate a count. Validate entries to update stock, update stock totals and close the stock count.
Sales process overview How to set up sales How to enter sales quotes How to enter sales orders How to set up sales pricing How to allocate and ship stock	Process the entire sales flow from stock through to customer delivery.

How to perform stock returns	Receive purchasing from supplier through to stocking inventory.
How to perform sales inquiries and reports	
Purchasing process overview	
How to set up purchasing	
How to enter purchase requests	
How to perform MRP reordering	
How to perform buyer planning	
How to enter purchase orders	
How to perform receiving and invoicing	
How to perform purchasing inquiries and reports	

How to perform quality control	Perform signature management for both purchasing and sales.
How to use the warehouse functionality	
How to use purchase order signature management	Manage loaned stock.
	Track advanced purchasing costs.
How to manage loaned stock	Validate purchases, deliveries and invoicing.
How to perform inter site transactions	
How to set up and use advanced purchasing costs	
How to perform purchasing 3-way matching	
How to perform bill of lading	

Extended Learning

To prepare you for the Advanced Training, it is recommended that Distribution Consultants attend the **Understanding and Creating Workflows** course

Configuring the Solution – Implementation Workshop

This interactive workshop will provide hands-on experience for implementing and configuring the Sage X3 system.

Using actual customer implementation scenarios, you will work within a project team to review and make decisions to best configure the system and meet the needs of your client. There are assigned tasks and discussion points with the instructor and other attendees, to share approaches and outcomes.

During the course, delegates gain confidence and proficiency having worked through real life examples with your peers and being provided with best practice advice and support.

The workshop serves to reinforce prior learning and to introduce the implementation process. By the end of the course delegates can describe the basic stages of Sage X3 implementation.

Pre- Requisites

- Completion of the Core Product Learning.
- Sage X3 Mentor assigned (recommended not mandatory)

What you will learn

Subject	Learning Outcome
Project team organization and roles Project Plan Preparation Implementation Phase Best Practices	Understand the implementation process. Understand the volume and depth of information required to implement. Identify the site and company setup required for a basic install. Prepare a document describing the software solution provided.
Configuration of solution Implementation Phase Best Practices	Understand and perform financial setup Understand and perform implementation data uploads Understand and set up purchasing and sales activity including associated pricing and shipping Perform invoicing for both sales and purchasing activity

Configuration of solution	Demonstrate the ability to upload electronic data.
Implementation Phase Best Practices	Construct test data for customers, suppliers and products.
	Test and exercise the installed system to verify sales, purchasing and financial information can be processed.
	Review, set up and run reordering functions including statistical and demand driven methods such as MRP and MPS
Primary focus on testing implementation set up	Describe training required for end users of the new system.
Implementation Phase Best Practices	Explain the preparations needed to go live with the new software.
	Detail and define the source for data for Acceptance Testing and the testing procedure.
	Validation of set up through testing prior to mock go live
Go live preparations and processes	Able to apply the Sage X3 Implementation Methodology to a project.
Review of implementation accomplishments	Ability to create a production folder
Recap phases of an implementation	Undertake preparations for go live
	Confident using the product having gained experience working and collaborating with an implementation team.
Review the project Follow-up Phase	Describe start-up operations including post project activities.

Project Manager Workshop

This event provides delegates with a thorough understanding of the expectations of a Project Manager.

Attendees will learn and practice the Sage Implementation Methodology across the full project lifecycle preparing them for their role.

Delegates will gain a clear understanding of how to set client expectations and become familiar with the tools and documentation used.

Pre-Requisites

- Introduction to Sage X3 and Market
- Getting Started: Introduction to Sage X3
- Getting Started: Common Data
- Getting Started with the Cloud

What you will learn

Subject	Learning Outcome
Review of the Sage X3 Implementation Methodology	Able to deliver the STREAM methodology, to run a proper kick off meeting, planning and outcomes of running a project.
Expectations of a Good Sage X3 Project Manager	
Day in the life of a Sage X3 Project Manager	Able to work with sales teams to start a project and gather all necessary information.
Sage X3 Sales to Services Handoff pre-sales transition process	
Project Planning and Scenarios	Plan and prepare for a project using common milestones.
Project Management Do's and Don'ts	
Group Sessions on Kick off, weekly status calls, monthly steering committee meetings	Confidently run conduct different project activities eg scoping meetings, kick off meetings, status calls etc
Team presentations and critiques	Advanced project manager "soft skills" - being a coach, a good listener, and a strong leader.
Building and maintaining client relationships	Ability to guide clients through implementations.
How to mentor and guide clients through implementations and maintain robust documentation of changes	Mentor of management and SME's through the project process from the client side.

Escalation process	Able to follow the escalation process internally and externally when a situation arises.
Current PM tools and documentation used for running a project	Able to run projects using the standard documentation
Team relationships	Able to work and communicate with a variety of internal and external resources.
How to mentor and guide consultants through implementations	Mentor consultants on what is expected, how to deliver, how to grow their relationship with the client and the importance of their role.
Working with ISV and Partners	
Working with other Project Managers	Capable working with other Project Managers on resourcing issues, seek advice on issues faced, and game planning large projects.
Discussion with current PM'S about their challenges and advice	
Review and any open Q&A questions of next steps	

Core Manufacturing

This instructor-led Manufacturing Consultant course is designed for the consultant responsible for implementing and configuring the Manufacturing solution for Sage X3.

The course has three main areas of learning: Basics, Beyond the Basics, and an Interactive Workshop. You will have multiple opportunities throughout the training to interact with the instructor and gain valuable hands-on experience working with the program by completing various activities and labs.

This course must be completed prior to attending the Advanced Manufacturing course.

Refer to Sage U (www.sageu.com) for additional information on this course.

Core Development

Attend the Development Basics virtual course to learn how to use the development tools for Sage X3. You will learn how to create your own Windows, Screens, Objects, and Functions as well as modify existing processes.

In addition, we will discuss how to use the Eclipse editor to write and debug code as well as get an overview of new development methodologies.

This course must be completed prior to attending the Advanced Technical or Expert Developer courses.

Refer to Sage U (www.sageu.com) for additional information on this course.

Self-Directed Learning

Get certified

All your time, focus, and energy during the core training have given you the tools and knowledge you need to prepare and pass your assigned certification(s). This is an important step in your journey of Mastering Sage X3.

Step 1 - Prepare to take exam
- Review study guide
- Refer to the 'what's new' guide
- Review and study the training materials
- Practice in the Sage X3 program

Step 2 - Take Practice (sample) exam
- This exam provides a small sample of the actual questions in the certification exam

Step 3 - Pass Certification exam(s)
- Based on your specialism(s) you may opt to take more than one certification exam
- Complete online at your desk
- Use the Sage X3 program along with training materials while taking the exam

Get hands on experience

Prior to attending the Mastering Sage X3 bootcamp you should have a personal development discussion with your line manager. It should be clear to you what you should achieve and how you will apply this upon your return to your workplace.

To support your learning there should be a roadmap of work in place for when you return to the office, and where practical, a mentor in place. This will allow you to gain experience in a supported environment and ensure you put into practice the knowledge you've gained in the classroom.

The nature of this work may vary depending on your role and experience. You might initially shadow experience consultants or immediately be hands on in a project.

Build your knowledge

Learning doesn't stop once the core training is over. We provide a range of additional resources to increase your knowledge base.

Directly after the course delegates should refer to the "What's New?" technical videos on Sage U to keep up to speed with any changes. This will prepare you for certification and ongoing knowledge.

Sign up and be involved in Sage City. Sage City is a global online community for Sage customers, partners, accountants, students and other users of Sage Software. You will be able to see real life issues and questions from Sage X3 end users in a dedicated area

Grow your network

Delegates build a close peer group from attending the bootcamp and continue to share experiences with. Furthermore, having a mentor assigned allows you to easily connect with others within the Sage X3 community.

Additional learning

The Mastering Sage X3 program provides the core product fundamentals and lays the foundations for students as they start their consultant role. After completion there are a range of other courses available on Sage U to enhance knowledge up to an Expert level.

Following your core training, you will progress onto the Advanced courses for your chosen specialism.

Learn more and Register
SageU.com/MX3Bootcamp