

# COURSE OUTLINE

## Sage Evolution Premium Administrator Course (LU 3)



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## Course Outline

This comprehensive training course covers the activities that an administrator will perform in a Sage Evolution Premium environment.

## Course duration

This course is scheduled for three days (18 hours).

## Course pre-requisites

Learners need to meet the following prerequisites before attending the Sage Evolution Premium administrator course:

1. Sage Evolution Premium Practitioner Course (EPCU - Learning Unit 1)
2. Sage Evolution Premium Product Consultant Course (EPCU - Learning Unit 2)

If you are not yet competent in the required prerequisites, you must first complete the relevant courses before enrolling for this course. It is essential that the course prerequisites are met so as to avoid being asked to leave and the course fees being forfeited.

## Documentation

The following documentation is included with the course

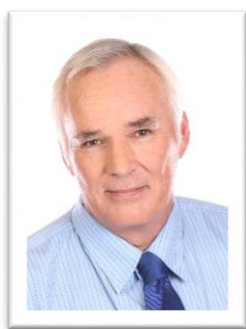
- Learning Unit 3 user guide
- User competency assessment
- Certificate of attendance

## Who should attend?

If you want to learn how to set up and administer the Sage Evolution Premium environment as a System Administrator or Super User, this course is for you.

## The Facilitator

### Werner Muller



Werner Muller has been active in Sage 300 ERP for twelve years and in this time has obtained a lot of practical and theoretical experience - with 30 years of accounting experience.

He comes from a corporate and training environment where he was a junior lecturer for statistics and applied maths. He completed his articles at Theron van der Poel and attended the University of Pretoria where he studied B-Com Auditing. He is dedicated to training since it is his passion to deliver effective meaningful skills and to uplift all the students coming through our AccTech Systems training centre.



## Topics Covered

This course will teach you how to setup, configure and administer the Sage Evolution Premium software environment according to your role within the company. The following table outlines the key performance areas of the different administrators:

<b>Super User</b>	
<ul style="list-style-type: none"> <li>• Must be able to perform any, and all, transactional processes;</li> <li>• Be familiar with all business processes;</li> <li>• Act as first line of support for transactional and business process support purposes;</li> <li>• Creating users and assigning to user groups managed by financial administrator;</li> <li>• Backup strategy management;</li> <li>• Security administration.</li> </ul>	
<b>System Administrator</b>	<b>Financial Administrator</b>
Monitor and manage the following: <ul style="list-style-type: none"> <li>• Software set up on user machines;</li> <li>• Connectivity set up and control;</li> <li>• Disaster recovery management;</li> <li>• Troubleshooting system problems in terms of the Evolution software;</li> <li>• Security administration;</li> <li>• Database backup schedules;</li> <li>• Manage and communicating maintenance schedules;</li> <li>• Performing system upgrades;</li> <li>• Perform client and server software installations.</li> </ul>	Monitor and manage the following: <ul style="list-style-type: none"> <li>• Creating and managing master files (AR, AP, GL, Stock);</li> <li>• Creating and managing transaction types;</li> <li>• Creating and managing inventory groups, sales reps, projects etc.;</li> <li>• Opening and closing periods;</li> <li>• Capturing of daily FOREX rates;</li> <li>• Managing module defaults;</li> <li>• Managing group permissions;</li> </ul>

The following outlines the content that will be covered:

### Install and Register Pastel Evolution

- Prepare your company for Pastel Evolution.
- Understand the different elements of networking.
- Identify the system requirements.
- Install Pastel Evolution.
- Create and register a common database.

### Maintain Pastel Evolution

- Log into Pastel Evolution.
- Administer important operational and maintenance functions.
- Use the Utilities menu.
- Navigate within Pastel Evolution.
- Create user defined fields.
- Use the help functions.
- Use the help functions.



### **Pastel Evolution Core Default Settings**

- Explain the importance of default settings.
- Set the general ledger defaults.
- Set the accounts receivable defaults.
- Set the accounts payable defaults.
- Set the inventory defaults.
- Set the order entry defaults.
- Set the alert management defaults.

### **Reports**

- Identify the different reports.
- Generate reports.
- Customise reports.
- Import reports.

### **Pastel Evolution Add-on Default Settings**

- Explain the importance of default settings.
- Identify the add-on modules which require the setting up of defaults.
- Set up the Annuity Billing add-on module defaults.
- Set up the Bill of Materials add-on module defaults.
- Set up the Credit Control add-on module defaults.
- Set up the Contact Management add-on module defaults.
- Set up the Fixed Assets add-on module defaults.
- Set up the Job Costing add-on module defaults.
- Create Foreign Currencies and Exchange Rates.
- Set up the Warehouse add-on module defaults.
- Set up the Point of Sale add-on module defaults.
- Set up the Procurement add-on module defaults.
- Set up the Delivery Management add-on module defaults.
- Set up the Global Tax add-on module defaults.
- Set up the Voucher Management add-on module defaults.
- Set up the Advanced Procurement add-on module defaults.
- Set up the Service Manager add-on module defaults.
- Set up the Mobile Sales add-on module.

### **System Audit Manager**

- Have an overview of the System Audit Manager.
- Know how the System Audit Manager works.

### **Upgrading your databases**

- Upgrade a standard Pastel Evolution database.

### **Outlook Add-in**

- Integrate the Outlook Add-in.



## **ELECTIVE MODULES:**

### **Configure branch accounting databases**

- Create your head office database.
- Create your branches in the common module.
- Administer the System Wizard process.
- Export your configuration files for your branches.
- Create and prepare the necessary folders.
- Process the initial import.
- Run the Sync Monitor at the Branches.
- Check the Local Folders.
- Upload and Download Data.
- Run Head Office and Branch Synchronisations.
- Know about the changes to the Evolution Database Structure.
- Handle Troubleshooting.
- Upgrade your databases in a Branch Accounting Environment.
- Process loan accounts and inter branch transfers.
- Online vs offline processing.

### **Sage Evolution Retail Management**

- Set up your Retail POS environment.
- Set up a Fiscal Printer.
- Set up the Retail POS default settings.
- Set up till access or security settings.
- Create user defined fields for retail documents.
- Customise till document and/or slip layouts.

### **Municipal Billing Maintenance**

- Install the Municipal Billing add-on module.
- Register the Municipal Billing add-on module.
- Log into the Municipal Billing database.
- Navigate within the Municipal Billing add-on module.
- Set up the Municipal Billing add-on module defaults and user permissions.

## **Venue Details**

We have training facilities in Centurion.

### **Centurion**

1001 Clifton Avenue  
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Centurion

### **For bookings or more information**

For bookings or more information please feel free to contact us at 0861 11 1680 or e-mail [training@acctech.biz](mailto:training@acctech.biz)

For the latest event schedule visit our training page on [www.acctech.biz](http://www.acctech.biz)

