

# **New User Boot Camp**

**Beginner Training Guide for  
Southware Excellence Series**

# How to Logon and Logoff

- 1. Logon to the operating system
- 2. Logon to Southware
- 3. Logging off of Southware

# The layout of the screens

- 1. Top Menus
- 2. Full Screen

# Menu structure

- 1. Standard
- 2. Tree View
- 3. Web view
- 4. Terminology

# System Navigation

- 1. Standard Menu
- 2. Portal Navigation

# Function Keys & Rapid Keys

- 1. Function Keys
- 2. Shortcuts
- 3. Rapid Keys

# System Security

- 1. Company
- 2. Operators
- 3. Security Levels
- 4. Transaction Operators

# Entering & Editing Data

- 1. Entering Data
- 2. Item Help
- 3. Look ups & Searches
- 4. Wildcard Lookups
- 5. Extended Data & Searches
- 6. File Viewer Grid Tool
- 7. Editing Data
- 8. Alter, Delete, Rename

# Three Step Posting

- 1. Enter and Edit
- 2. Print Edit List
- 3. Post

# Data Inquiry

- 1. Zoom views
- 2. Integrated Inquiries
- 3. Zooms
- 4. Executive Inquiries

# Printing & Running reports

- 1. Running a report
- 2. Spooled Reports
- 3. Reportmate Reports
- 4. FYI Reports in Reportmate

# Advanced Functions

- 1. Email & Fax
- 2. HTML
- 3. Extended Data
- 4. Workflow
- 5. Exporting Data
- 6. Importing Data
- 7. OfficeLink
- 8. Error Codes