Kantata SX

Administration Training Course Overview

Course Description

Kantata Administration Training allows your business administrators to effectively manage Kantata. The Kantata Administration Training course is aimed at Salesforce Administrators that are responsible for managing and administering Kantata SX for their organization.

Course Goals

To educate Kantata customers, partners, and employees on the key concepts of Kantata setup and to manage the core administration and management activities for your Kantata SX org.

Course Objectives

After completion of this program, students will be able to:

- Use the Key Concepts of Kantata Setup
- Manage annual/ ad hoc activities

The class is intended to go in the format of presentations, demonstrations, and student hands-on lab exercises.

Prerequisites

- Prior experience or familiarity with the Kantata solution is required.
- Kantata members that are responsible for administering the solution.

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Schedule Overview

DAY 1 - Key Concepts

Kantata users will be presented with in-depth training on Administration basics, and how to use and manage the functional areas of Kantata.

Objectives

At the completion of these modules, students will be able to understand and administer:

- Key Concepts and Architecture
- Resources and Resource Functionality
- Kimble Security
- Period Management Fundamentals
- Usage Behavior Rules

DAY 2 - Ad Hoc Activities

Students will learn how to make ad hoc updates as their organization grows and changes.

Objectives

At the completion of this course, students will be able to understand and administer:

- Propositions, Product Groups and Products
- Other Activities
- Approval Processes
- Expense Categories
- Calendars
- Time Categories
- Activity Roles
- Locations

DAY 3 - Rates

Students will learn about Currency and Rate Management

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Objectives

At the completion of this course, students will be able to understand and administer:

- Business Units
- Currency Handling
- Tax Codes
- Introduction to Rate Management
- In Flight Rates changes

DAY 4 - Background Settings

Students will learn background settings and how to get additional support beyond this course.

Objectives

At the completion of this course, students will be able to understand and administer:

- Reference Data Tab (Custom Org Settings)
- Sense
- Portal

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