

## Accounting Department (Finance) 1<sup>st</sup> Month Objectives

Mentor's Name: \_\_\_\_\_ Employees Name: \_\_\_\_\_

Hire Date: \_\_\_\_\_ Title: \_\_\_\_\_

Training Requirement	Initials or (N/A)
<b>Ability to run Accounts Payable Reports in Viewpoint.</b>	
Train employee on running Aged Open Payables report.	
Train employee on running Vendor Drill Down report. Demonstrate example and have employee demonstrate 3 vendor drill downs	
Example:  1.  2.  3.	
Train employee to run Vendor Payment History Report	
Train employee to run Unapproved Invoices report.	
<b>Ability to run Programs and Reports in Accounts Receivable in Viewpoint.</b>	
Train employee how to run AR Aging Reports	
Train employee how to run Customer Accounts by customer Report	
Train employee how to run Monthly Revenue by GL account Report.	
Train employee how to run Misc Receipts Report.	
Train employee how to utilize the Cash Receipts Program. Provide three examples.	
Example 1:  Example 2:  Example 3:	
Train employee how to utilize the Invoice entry program. Provide three examples.	
Example 1:  Example 2:  Example 3:	
Train employee how to utilize the AR Customers program. Provide three examples.	
Example 1:  Example 2:  Example 3:	

<b>Ability to run Job Cost Reports in Viewpoint</b>	
Train employee on how to run JC Detail Report	
Train employee on how to run Job Profitability Internal Report	
Train employee on how to run Cost of Revenue report	
Train employee on how to run Work in Progress with Overrides report	
Train employee on how to run Revenue Detail report	
Train employee on how to run Cost by Job Phase and Cost type report	
<b>Ability to run General Ledger Reports in Viewpoint</b>	
Train employee on how to run Trial Balance report	
Train employee on how to run Income Statement report	
Train employee on how to run Balance Sheets report	
Train employee on how to run Journal Transaction report	
<b>Ability to locate resources in the MGE Portal</b>	
Train employee on how to access and navigate the MGE portal	
Train employee on how to locate and save documents and forms	
<b>Ability to locate resources in the One drive.</b>	
Train employee on how to locate the one drive and what information can be found	
<b>Ability to locate resources in SharePoint.</b>	
Train employee on SharePoint and how to locate and store information	
<b>Ability to navigate and locate resources in Teams</b>	
Train employee on how to create and join calendar events in Teams	
Train employee on how to create a chat and video call in Teams	
Train employee on how to store and locate documents in Teams	
<b>Ability to navigate Outlook</b>	
Train employee how to locate personnel through Outlook	
Train employee on creating signature in Outlook	
Train employee on creating inbox folders and rules in Outlook	
Train employee on creating calendar events in Outlook	
Train employee on archiving and email management	
<b>Ability to submit a receipt</b>	
Train employee on the process of submitting receipts to AP.	
<b>Ability to complete Weekly Safety Meetings</b>	
Train employee on how to locate and complete weekly safety meetings and the requirement to complete them	
<b>Ability to Update Employee information (I.E. Address, phone number etc.)</b>	
Train employee on how to update employee information	
<b>Ability to request time off/sick time</b>	
Train employee on how to request time off/submit for sick time	
<b>Ability to request resources (Keyboards, monitors, etc.)</b>	
Train employee on how to request asset resources.	
<b>Additional Training Provided:</b>	
1.	
2.	

3.	
4.	
5.	