

# Agenda - Proactis Management Console Training

## Sessions 2 - Proactis Management Console: Workflows troubleshooting and integration

Duration: 3 hours

Audience: System administrators, Accounts Payable, Finance and Procurement

### Key Areas Covered: Authorisation workflows, accounting set up, troubleshooting and document export.

**Key Objectives:** To be able to understand the relationship between account group set, authorisation workflows and document templates. Additionally be able to monitor and manage integration and troubleshooting issues.

### Areas Covered

Company Settings	Authorisation Workflows
<ul style="list-style-type: none"> <li>Nominal Codes</li> <li>Financial Periods</li> <li>Currencies</li> <li>Tax Codes</li> </ul>	<ul style="list-style-type: none"> <li>Accounting Groups</li> <li>Authorisation Rules (Templates and nominal level)</li> <li>Authorisation Pools</li> <li>Multi-stage Rules</li> <li>Authorisation Re-Assignment</li> </ul>
Troubleshooting	Integrations
<ul style="list-style-type: none"> <li>Invoice Discrepancies</li> <li>Discrepancy Re-Assignment</li> <li>Invoice Matching Queue</li> </ul>	<ul style="list-style-type: none"> <li>Overview of process</li> <li>Document export</li> <li>Imported data</li> </ul>

### Delivery

The session will be delivered online via MS Teams to a group of up to 8 individuals