

Course Agenda

Project Accounting & Change Management

Sage 300 CRE | Instructor: Jeff Pisetzner

Course Overview

In this class, you will become familiar with basic Project Management workflow by learning how to use the available tools in the application to organize and track and monitor key project cost information, documents, and correspondence in one centralized system.

The lecture will be an 8-hour session with activities to practice on after class. The training assumes that you are familiar with Microsoft windows.

This course is designed for Project Accountants and Assistant Project Managers who are responsible for the day to day Contract and Cost control and change management within a given project.

Agenda

- **Session 1**

9:00-10:30am

- Connecting to the Training Data Set
- Launch Project Management
- Project Management Settings
- Custom Descriptions
- Setup Address Book
 - Setup Companies
 - Setup Persons
 - Searching for Contacts
- Setup Jobs
 - Job Setup
 - Job Contacts & Distribution Lists
 - Setup Standard Spec Sessions
 - Re-Numbering Jobs
 - JC Job-Awarding Job for Job Costing

- **Session 2** **10:30-11:45am**
 - Cost Estimates
 - Entering Estimated Cost
 - Finalizing Estimates
 - Reporting Impact
 - Contracts
 - Contract Setup
 - Setup Schedule of Values
 - Approving Contracts
 - Linking Contract Items to Jobs
 - Reporting Impact

- **Session 3** **11:45am-12:30pm**
 - Commitments
 - Entering Commitments
 - Commitment Types
 - Releasing to Accounting/Security Considerations
 - Commitment Detail
 - Commitment Scope, Dates, & Compliance Items

- LUNCH BREAK** **12:30-1:30pm**

- **Session 4** **1:30-3:30pm**
 - Change Request
 - Job Setup
 - Creating Change Requests
 - Request for Vendor Quotes
 - Pricing Methods/Pricing a Change Request
 - Submitting Change Requests
 - Reporting Impact
 - Change Orders
 - Entering Change Orders
 - Internal Change Orders
 - Updating Estimates
 - Reporting Impact

- **Session 5** **3:30-4:00pm**
 - Commitment Change Orders
 - Enter Commitment Change Order
 - Revising Commitment Originating from a Change Request
 - Revising Commitment Items
 - Release to Accounting/Revise Commitment
 - Reporting Impact

- **Session 6** **4:00-4:30pm**
 - Miscellaneous Worksheets
 - When and How to Use Miscellaneous Worksheets
 - Enter Scheduled Value Amounts
 - How Scheduled Value Entries Affect Job Cost Records
- **Session 7** **4:30-5:00pm**
 - Q&A

Independent Activities

- **Session 1 Activity**
 - Enter Company/Contacts
 - Enter Person Contacts
 - Search Functions
 - Setup Job
- **Session 2 Activity**
 - Enter Cost Estimate
 - Enter Contract/Schedule of Values
- **Session 3 Activity**
 - Enter Subcontract Commitments
- **Session 4 Activity**
 - Enter Change Request
 - Enter Change Orders
- **Session 5 Activity**
 - Enter Commitment Change Order