

Sage Timberline Office
Training Data Sets
Application and Crystal Reports Classes

CERTIFIED COURSE CURRICULUM
SAGE UNIVERSITY



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Sage Timberline Office Training Classes

When you participate in Sage Timberline Office training classes or complete tutorials using certified course curriculum materials, you see software demonstrations and screen shots that include training data. This data is provided so that you can work with the applications in a training environment without altering your company's valuable data. If you or any of your employees want to practice using the software before going live, you should install the training data sets.



NOTE: If your company has enabled Security Administration, your Application Administrator must add the data set to the company list and grant you access. For more information, see the *Security Guide* (**Desktop: Tasks > Sage Timberline Office > Sage Timberline Office Documents > Security Guide**).

► Find the Data Set You Need

Training data sets have been provided for the construction accounting, real estate, and estimating industries. When you visit the training data page on Sage U (www.sageu.com/timberline > **Training Data**), you see categories for each of these industries. The rest of this document provides information about the training data set that goes with each class. Each training data set is provided as a self-extracting zip file, and is compatible with the software version under which it is listed on the page.

Additionally, sample data sets have been provided with the software. Some classes use these sample data sets instead of the training data found on Sage U. (These classes are indicated in the remainder of this document.) To find the sample data sets, repeat the workstation installation on your computer and select the check boxes for the sample data sets you need.

► **How to Install the Training Data Sets from Sage U**

1. On the Sage U training data page (www.sageu.com/timberline > **Training Data**), click the link to the data folder that you need.
2. Click **Run**. If you see a message about the publisher, click **Run** again.
3. Verify that the **Unzip to folder** shows either **C:\Training** (for accounting data) or **C:** (for estimating data). Change this entry if necessary.
4. Click **Unzip**. The data is copied to your hard drive.

The accounting data is placed in *C:\Training\Data-set-name*.

Estimating data is placed in either *C:\TESchool*, *C:\TESchool_SMB*, or *C:\TESchool_Models*, depending upon the data set you selected.

Construction Accounting Classes

The following tables show you which training data set you should install for each available Sage Timberline Office training class. The file name for the data set shows the software version to which it corresponds.



NOTE: If your company has enabled Security Administration, your Application Administrator must give you access to the training data set by adding it to the company list and granting you access. For more information, see the *Security Guide* (**Desktop: Tasks > Sage Timberline Office > Sage Timberline Office Documents > SecurityGuide**).

Note About Transactions in Training Data Sets

In certain cases, transactions in the data set that you use may show a different year than the illustrations in this book, or than the instructor shows in class. If your data set transactions show a different year, but all other details such as the prefix and account setup, vendor names, and jobs are identical, your data set will correspond to the materials in all respects but the date.

When you complete the activities that involve dates, you may see a different year in the instructions or screen shot than in your data. Use the appropriate year based on the data you are using for activities. For example, if 2011 is the current year in your data and the activity prompts you to enter prior year information, enter a date in 2010. If the activity prompts you to enter current year information, enter a date in 2011.

Construction Accounting Setup

Construction Accounting Setup Classes Curriculum Materials	
General Ledger and Cash Management Setup	
Lecture	Extended.exe and GLSetup.exe (to show multiple prefixes)
Activities	Create from scratch as part of activities
Job Cost Setup	
Lecture	Extended.exe
Activities	Use the data resulting from the General Ledger and Cash Management Setup class, or use the data set GLCMJC_Setup.exe
Accounts Payable Setup	
Lecture	Extended.exe
Activities	Use the data resulting from the General Ledger and Cash Management Setup and Job Cost Setup classes, or use GLCMJC_Setup.exe
Payroll Setup	
Lecture	Extended.exe
Activities	Use the data resulting from the General Ledger and Cash Management Setup and Job Cost Setup classes, or use GLCMJC_Setup.exe

Revenue Application Setup

Revenue Application Setup Curriculum Materials	
Accounts Receivable and Contracts Setup	
Lecture	Extended.exe
Activities	ExtNoRev.exe
Billing Setup	
Lecture	Extended.exe
Activities	ExtNoBL.exe

Construction Accounting Workflow

Curriculum Materials	
General Ledger and Cash Management Workflow	
Lecture	Extended.exe
Activities	CMStart.exe
Accounts Payable Workflow	
Lecture	Extended.exe
Activities	CMStart.exe
Job Cost Workflow	
Lecture	Extended.exe
Activities	CMStart.exe
Payroll Workflow	
Lecture	Extended.exe
Activities	CMStart.exe

Revenue Application Workflow

Revenue Application Workflow Curriculum Materials	
Accounts Receivable and Contracts Workflow	
Lecture	Extended.exe
Activities	Extended.exe
Billing Workflow	
Lecture	Extended.exe
Activities	Extended.exe

Service Management Setup and Workflow

Service Management Curriculum Materials	
Service Management Setup	
Lecture	SMTrain.exe
Activities	SMTrain.exe
Service Management Workflow	
Lecture	SMTrain.exe
Activities	SMTrain.exe

Other Classes

Curriculum Materials for Other Classes	
Advanced Report Designer	
Lecture	Construction Sample Data (included with software).
Activities	Construction Sample Data (included with software).
Concepts and Tools	
Lecture	Construction Sample Data (included with software).
Activities	Create from scratch as part of activities
Equipment Cost	
Lecture	Extended.exe
Activities	Extended.exe
Financial Statement Designer	
Lecture	Timberline(FS-Instructor).exe
Activities	Timberline(FS).exe
Inquiry Designer	
Lecture	Extended.exe
Activities	Extended.exe
Project Management Contract Control and Change Management	
Lecture	PJ_Training_Data.exe
Activities	PJ_Training_Data.exe

Curriculum Materials for Other Classes	
Project Management Document Control	
Lecture	PJ_Training_Data.exe
Activities	PJ_Training_Data.exe
Purchasing and Inventory Setup and Workflow	
Lecture	Construction Sample Data (included with software).
Activities	Construction Sample Data (included with software).
Remote Time Setup and Workflow	
Lecture	Extended.exe
Activities	CMStart.ex
Report Designer	
Lecture	Construction Sample Data (included with software).
Activities	Construction Sample Data (included with software).

Estimating Classes

Which Data Sets Should I Install?

Sage Estimating Solutions training materials use specific data sets for each class. Select your data set as follows:

- If you use Sage Master Builder, select TESchool_SMB.exe.
- If you are taking a Model Estimating class, select TESchool_Models.exe.
- For all other courses, select TESchool.exe.



NOTE: If your company has enabled Sage Timberline Office Security Administration for version 9.5 or later, your Application Administrator must give you access to the accounting training data set contained in the TESchool folders. This is done by adding the data set to the company list and granting you access. For more information, see the *Security Guide (Desktop: Tasks > Sage Timberline Office > Sage Timberline Office Documents > SecurityGuide)*.

► To Install Training Data

1. On the Sage U training data page (www.sageu.com/cre > **Training Data**), click the link to the data folder that you need.
2. Click **Run**. If you see a message about the publisher, click **Run** again.
3. Verify that the **Unzip to folder** shows C:\. Change this entry if necessary.
4. Click **Unzip**. The data is copied to your hard drive. Estimating data is placed in either C:\TESchool, C:\TESchool_SMB, or C:\TESchool_Models, depending upon the data set you selected.
5. Determine whether you need to configure the database for Address Book, as follows.

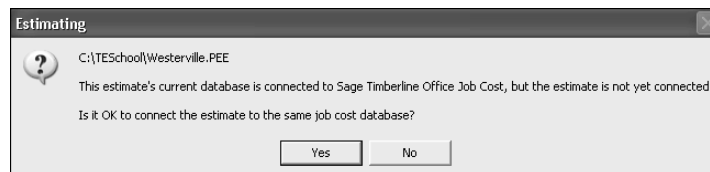
The Estimating training data sets accommodate workstations that have Estimating plus Sage Timberline Office, Sage Master Builder, or both installed.

If you use the TESchool_Models or TESchool data set, and you do not have Sage Timberline Office accounting products installed on your workstation, you must associate the database with the correct address book using the procedure that follows.

► **To Associate the Correct Address Book with the Data Set**

Follow this procedure if you use either the TESchool or TESchool_Models data set and your workstation does not have Sage Timberline Office accounting products installed.

1. In Estimating, select **Database > Open Database**.
2. Browse to the Estimating training data set folder you use (either C:\TESchool or C:\TESchool_Models).
3. Double-click the **pei.dat** file to open the Estimating database.
4. Select **Database > Database Settings**. On the **Company** tab, in the **Company Folder** area, click **Select**.
5. In the **Select Company** window, click **Specify Folders**.
6. Next to **Data folder path**, click **Browse**, and browse to the data folder that is suitable for you: either C:\TESchool\Address Book Est Only, or C:\TESchool_Models\Address Book Estimating Only.
7. Click **OK**, and then click **Yes** to the warning message.
8. Click **OK** to close the **Database Settings** window. After a few moments, the data is refreshed and the window closes.
9. When you first open any of the existing estimates in your training data set folder (**File > Open Estimate**), you will see the following error message.



10. Click **Yes**, so that your estimate is associated with the same **Company Folder** as your database. (If you click **No**, the estimate will no longer be associated with the Estimating database.)

Real Estate Classes

Sage Timberline Office training materials use specific data sets for each class. The following tables show you which training data set you should install for each available real estate training class. The file name for the data set shows the version number for the CD version to which it corresponds.



NOTE: If your company has enabled Security Administration, your Application Administrator must give you access to the training data set by adding it to the company list and granting you access. For more information, see the *Security Guide (Desktop: Tasks > Sage Timberline Office > Sage Timberline Office Documents > SecurityGuide)*.

Note About Transactions in Training Data Sets

In certain cases, transactions in the data set that you use may show a different year than the illustrations in this book, or than the instructor shows in class. If your data set transactions show a different year, but all other details such as the prefix and account setup, vendor names, and jobs are identical, your data set will correspond to the materials in all respects but the date.

When you complete the activities that involve dates, you may see a different year in the instructions or screen shot than in your data. Use the appropriate year based on the data you are using for activities. For example, if 2011 is the current year in your data and the activity prompts you to enter prior year information, enter a date in 2010. If the activity prompts you to enter current year information, enter a date in 2011.

Real Estate Setup Classes

Setup classes should be completed in the order shown. In most cases, the data set for the activities in each class uses the data resulting from the previous class.

Real Estate Setup Curriculum Material	
General Ledger and Cash Management Setup	
Lecture	RE_Data.exe
Activities	Create from scratch
Accounts Payable Setup	
Lecture	RE_Data.exe
Activities	Use the data resulting from the General Ledger and Cash Management Setup class, or use the data set GLCMRE_Setup.exe
Property Management Setup	
Lecture	RE_Data.exe
Activities	GLCMRE_Setup.exe

Real Estate Workflow Classes

Real Estate Workflow Curriculum Materials	
General Ledger and Cash Management Workflow	
Lecture	RE_Data.exe
Activities	RE_Data.exe
Accounts Payable Workflow	
Lecture	RE_Data.exe
Activities	RE_Data.exe
Property Management	
Lecture	RE_Data_Wkflow.exe
Activities	RE_Data_Activ.exe

Service Management Setup and Workflow Classes

Service Management Curriculum Materials	
Service Management Setup	
Lecture	SMTrain.exe
Activities	SMTrain.exe
Service Management Workflow	
Lecture	SMTrain.exe
Activities	SMTrain.exe

Other Classes

Curriculum Materials for Other Classes	
Advanced Report Designer	
Lecture	PM Sample Data (included with software).
Activities	Create from scratch during class
Advanced Retail	
Lecture	PM2000.exe
Activities	PM2000.exe
Concepts and Tools	
Lecture	Construction Sample Data (included with software).
Activities	Construction Sample Data (included with software).
Escalations and Recoveries	
Lecture	RE_Data_Wkflow.exe
Activities	RE_EscRec_Activities.exe
Financial Statement Designer (PM)	
Lecture	Timberline(FS-Instructor).exe
Activities	Timberline(FS).exe
Inquiry Designer (PM)	
Lecture	Extended.exe
Activities	Extended.exe
Report Designer (PM)	
Lecture	PM Sample Data (included with software).
Activities	PM Sample Data (included with software).

Sage Software and Crystal Reports Workbooks

The certified course curriculum materials for Crystal Reports for Sage Timberline Office and Sage Estimating Solutions show you how to design reports using the software. Activities in the workbooks walk you through procedures using the sample reports.

Each set of activity reports is configured to work with the Construction Sample Data set (included with the software). Use the version of the data that corresponds to the Sage Timberline Office version you have installed on your computer.

If your company has enabled security administration, your application administrator must give you access to the training data set by adding it to the company list and granting you access.

Also, if ODBC security has been enabled on the Master.apm or Master.glm files, this affects your access to tables in those files including the training data set. Talk to your application administrator about the best way to access the training data.