Sage Timberline Office

Anytime Learning | Project Management Subscription

Project Management Anytime Learning sessions are designed to jump-start your implementation and to provide a convenient introduction to the features and processes of the Project Management application. The sessions are well suited to acquaint new-hires or those new to the software, to cross-train employees, and to revisit skills that haven't been used in awhile.

Each session is a recorded, instructor-led presentation that includes demonstrations of the software and guidelines for daily tasks.

Sessions are from 5-20 minutes in length, and are always accessible and ready to view at any time you choose. Convenient controls allow you play, pause, fast forward, or go back and repeat parts of the session. You can:

- View a session as many times as you like.
- Encourage all interested personnel to access the sessions—your subscription is for the entire company.
- Choose sessions in the order that is most logical to you (although note any recommended prerequisites).

To register for this Anytime Learning subscription, visit **www.sageu.com** or call the training information team at 877-724-3285.

Concepts and Tools

New in Version 9.8

Version 9.8 offers improvements in performance as well as several new features and enhancements to make your workflow more efficient. This lesson highlights the changes in each application. View this lesson to get a quick introduction to the Server Migration Tool, new government forms and direct deposit options in Payroll, the batch email notification option added to Document Management, added security for Project Management change requests, new compatibility with Microsoft Office 2010, a new SMTP email sending standard, and system-wide journal enhancements. This lesson also highlights the Credit Card Processing and Electronic Fund Transfer features added to Accounts Payable, and the new customizable HR Forms added to Payroll.

New in Version 9.7

Version 9.7.0 provides you with the most asked-for enhancements as well as expanded compatibility with the latest technologies. View this lesson to find out how this version can benefit you. Discover an easier way to analyze and report on data using the new Basic Office Connector Starter feature. This feature can transform the way you find and analyze data from across your Sage Timberline Office applications. Find out about our expansive tax filing and reporting capabilities for state and federal government forms. Learn how to use the new Sage Installation Manager wizard to reduce time spent updating your workstations. Take a look at a new integration with AutoDesk's Quantity Takeoff 2010 project, and at our expanded Advanced Assembly Databases. See how Document Management automates more processes for you with Rules-based Routing. Learn about other enhancements and about the most recent supported platforms.

New in Versions 9.5 and 9.6

Are you upgrading to Sage Timberline Office 9.7.0 from version 9.4 or 9.5? If so, watch this lesson to understand what features have been added in versions 9.5 and 9.6. Learn about general enhancements to several applications as well as terminology and inquiry changes that impact everyone. You'll want to know about the new default locations for program and data files and how those affect you. Find out which security features have been enhanced, how to access the new Security Administration Tool, and much more.

Use Setup Central

If you are a new Sage Timberline Office customer, and your business partner or consultant has determined that Setup Central is a good match for your business, watch this session before you begin to use Setup Central. We'll show you how to access this popular tool, and how it can simplify and shorten your setup process. You will learn how to prepare to use Setup Central so that you can complete your software implementation with efficiency and ease.

Use the Sage Knowledgebase

Ever wish you had a Sage customer support analyst sitting at your desk? Or maybe the whole support team? Wish granted. You have access to the knowledge of our entire support team in a new Knowledgebase—and you can access it 24/7. Take a tour of this interactive, online tool so that you can find articles, release documents, software alerts, and notices related to any Sage product. First, we'll explore the expansive search options. Then we'll show you how to subscribe to a Knowledgebase article, so that you can receive updates by e-mail when the article has been modified. Won't that be handy for keeping track of tax changes? You'll also see how to give feedback on an article to the author, how to rate articles, and how to find the articles that have been rated as most useful. This session will benefit anyone who wants ready answers when software questions arise.

Use Help

Did you know that you can use the Help system to find out how to accomplish a task, fix a problem, define an industry concept, or learn about changes in a new release of the software? Anyone who uses Sage Timberline Office can benefit from learning how to get the most out of the Help system.

Understand Data Structure

Learn the basic concepts of data structure, file types, and posting transactions, with an emphasis on what you need to know to produce reports. This is a helpful introductory session designed for any real estate customer who performs general data entry or uses reports in Sage Timberline Office.

Use Reports and Inquiries

Information is power. Unleash the power of Sage Timberline Office and create reports and inquiries that organize and display vital information about your business. Learn the basic concepts to produce reports and view inquiries, and discover how to control the information you see or print. This session is helpful to anyone who uses Sage Timberline Office. To get the most out of this session, first view the Understand Data Structure session.

Customize Your User Settings

Want to customize Sage Timberline Office to your specific preferences? Learn how to set up the fixed decimal feature, printer fonts, toolbar and status bar configurations, and the print-to-file option. This session is designed for anyone who uses Sage Timberline Office.

Manage Files

Learn how to use the file management tools in Sage Timberline Office to help you manage your data and keep it running in tip-top condition. This session provides step-by-step instructions on how to backup and restore data files, and how to upgrade files after you have installed a new software release. Learn how to archive old transactions, remove unused records, and compact your files. This session is designed for system administrators, accounting managers, and data entry staff who manage data.

Address Book

The Sage Timberline Office Address Book is an integrated contact list that can be used by other Sage Timberline Office applications, including Project Management, Accounts Payable, Accounts Receivable, and Estimating. Discover the benefits of using Address Book and gain a basic understanding of this effective tool. Learn how to set up the companies you work with, and the people that you communicate with into an integrated list of vendor contacts, customers, subcontractors, and other contacts. See how other applications access the appropriate list for each situation. This session is designed for anyone who uses Sage Timberline Office and references a list of company or individual contacts.

Desktop

Desktop Overview

What is the Sage Desktop? How can it simplify access to the tasks and information you need on a daily basis? Learn the components of Desktop and the tools available to help you customize Desktop. This session is helpful to anyone who wants to learn the benefits of using Desktop.

Use Desktop Tasks

How can you get the tasks, reports and websites that you frequently use into your Desktop? Learn how to create and organize My Tasks in Desktop. Review tools and tips that maximize your use of My Tasks. This session is designed as a follow-up to the Desktop Overview session, and is appropriate for anyone who uses Sage Timberline Office.

Navigate the Desktop Content Area

Do you need instant access to the current status of your projects, accounts, or properties? A Desktop Home Page can provide just that. Learn how to select a default Home Page and how to navigate within it. This session is designed as a follow-up to the Desktop Overview session, and is appropriate for anyone who uses Sage Timberline Office.

Project Management

Project Management Overview

You need to start using Project Management, but where do you begin? You don't want to do a lot of setup, and you want to see an immediate time savings. This session will help you develop an implementation strategy. Learn what features are offered, and which ones you can start using right away. Anyone new to Project Management will benefit from this introductory session. The Use Address Book session is a prerequisite for any session in the Project Management series.

Work with Documents

You keep track of thousands of details and decisions, and each one involves documents and communication. Project Management provides a single place to manage all of that. Learn how to create any kind of project document, from RFIs to submittals to change requests. Find out how easy it is to attach transmittals to documents, track correspondence and drawings, and print, e-mail, or fax copies of documents as you create them. This session is designed as a follow-up to the Overview session and is for anyone who needs to quickly learn the capabilities and organizational structure of Project Management.

Set Up Jobs

To track documentation on a project, you first need to set it up as a "job." Learn how to set up a job, create a list of job-specific contacts, and use the job information you entered in Project Management to create jobs in Job Cost. Do you have jobs already created in Job Cost that you now want to track in Project Management? You'll learn that simple process, as well. This session provides essential setup information for anyone working with Project Management, and should be viewed after the Anytime Learning sessions Project Management Overview and Work with Documents.

Request for Information (RFIs)

How many times do you request clarification or verification of details of your project? The RFI feature makes it easy to keep track of these requests. Learn how to create and distribute RFI documents, record responses, and access information related to RFIs. Find out how to quickly check the status of your RFIs through available logs, reports, and inquiries. This session is designed for anyone who creates, sends, and tracks Request for Information documents.

Transmittals

Do you usually attach a transmittal to each project document that you distribute? Simplify the process by creating transmittals in the Project Management software. Learn how to attach any type of document to a transmittal, including those created with other software applications. Find out how to print, e-mail, or fax a transmittal and its related documents. See how to easily review what you have sent and to whom. Anyone who creates and sends transmittals will appreciate the time savings this feature offers.

Submittals

Do you use submittals to record the process of receiving, reviewing, sending, revising, and approving materials for your projects? Project Management provides an efficient method to track submittals. Find out how to create, send, and revise submittals, and reroute rejected submittals. Learn to use reports and inquiries to monitor the status of submittals. Anyone who records and tracks submittals will benefit from this session.

Field Reports

Do you find yourself wondering just when that important visitor was onsite? Or trying to remember which day it was that the flash flood caused a delay in your progress? Do you have your site manager filling out written daily logs to track these details? Learn to use Field Reports to accurately and easily record information about the daily activity on the job site, special events, and conditions on the job, such as accidents, weather, or visitors. Find out how to record employee hours in a Field Report, and send that information to Payroll. We'll show you how to enter and print an objective summary of the day's activities and conditions that occur on-site. Field Reports can help you resolve disputes or claims, record the progress made on-site each day, and even send productivity details to Job Cost.

Correspondence Log

Ever get frustrated trying to log and track all the e-mail, letters, and phone calls related to a project? The correspondence log provides an intuitive, streamlined solution. Learn how it logs e-mail correspondence for you while you work in Microsoft Outlook. Discover how easy it is to add Microsoft Word and Excel documents to the correspondence log as you create them. Find out how to log phone calls and other correspondence, and how to respond to previously logged correspondence. This session will be helpful to anyone who keeps track of project-related e-mails and other correspondence.

Drawing Log

Did you distribute the most recent revisions to a drawing? Which sketch is current? The Drawing Log will keep track of these details for you. Learn how easy it is to record and distribute drawings, revisions, and sketches. Know at a glance who has received each drawing and when. Find out how to attach electronic drawings to the drawing log and send them out quickly with transmittals. This session is designed for anyone who needs to keep track of and distribute multiple drawings and revisions.

Meeting Minutes

Do you spend time documenting and distributing meeting minutes? Learn how the Meeting Minutes features can organize this task for you. Find out how to record and print meeting minutes, generate an agenda based on a previous meeting, and review or reproduce a prior set of minutes. See how easy it is to retrieve a list of meeting items that are still open. Anyone who needs an efficient way to organize meeting minutes and agendas will benefit from this session.

Custom Logs

Do you need to keep logs of details such as photos, concrete pours, safety issues, or deliveries? Custom logs are spreadsheets that you define to track any kind of project-related information. Discover how simple it is to create a custom log and record information in it. Find out how to quickly retrieve information from a custom log through available reports and inquiries. Learn the benefits of using custom logs instead of traditional spreadsheets. Anyone who tracks project-related details will benefit from this session.

Set Up Contracts

You were just handed a signed contract. How do you set it up in the software to begin the billing process? Learn how to set up contracts to capture the details of the actual contract and how to set up model templates for future use. This session is designed for anyone who administers contracts.

Set Up Contract Items

Learn how to set up individual contract items and how to define specific billing terms and agreements for each one. You'll appreciate the flexibility we provide for contract-based or cost-based billing. See how to link contract items to Job Cost to track cash flow and profitability for your job. This session is designed for anyone who administers contracts.

Approve Contract and Contract Items

Are you ready to begin billing against a contract? Learn the crucial step that must occur before the billing process can begin. You'll see how to approve one or more contract items at the same time and how this affects your job amounts. This session is designed for anyone who administers contracts.

Enter Commitments

How can you track the details of subcontracts and purchase orders? Learn how to create, approve, review, and modify these commitments. Find out how to print subcontract and purchase order documents, and related reports. Anyone who creates and manages project-related subcontracts and purchase orders will benefit from this session.

Manage Change Requests

Don't let change requests bog you down. Learn how to efficiently record potential change orders, submit requests for quotes, and monitor quotes. Find out how to use the flexible pricing tool to price lump-sum and time-and-materials change requests. You will learn how to accurately update the cost estimates in Job Cost, and which reports allow you to monitor the status of change requests. Anyone who manages change requests will benefit from this session.

Manage Change Orders

Changes to the project have been approved. What's the next step? Learn how to record change orders that cover one or more change requests. Find out how to update contract items, and the contract values stored in Job Cost. See how to update Job Cost estimates or move previously posted change request revisions from a pending status to approved. Become familiar with the reports that help you monitor change orders. This session is designed for anyone who manages change orders.

Enter Commitment Change Orders

Learn how to enter commitment change orders for subcontracts and purchase orders. See how to easily link the commitment change order to existing change requests and existing or new commitment items. Find out how the software automatically creates the appropriate transactions in Job Cost, as well. This session is designed for anyone who tracks change orders for purchase orders and subcontracts.

Move Jobs

Do you have Project Management jobs that are no longer active? Old jobs can slow down your daily processing and reporting by taking up space in your database. The Move Jobs tool solves this problem without permanently purging these records. All of the data associated with jobs that you archive with Move Jobs can still be included in reports, and viewed in inquiries. Learn how to use Move Jobs to archive those old records to an archive folder. Find out which jobs can be archived, what records move with the job, how to report on those records, and how to move archived jobs back to your active company folder. This lesson is designed for anyone who manages Project Management data.

Reports and Inquiries

Information is only useful when it is in a format that is meaningful to you. Project Management provides an abundance of reports in helpful formats. Learn where to find reports and inquiries that meet specific needs. Find out how to see levels of detail within available reports and inquiries. Anyone involved in project management will benefit from this session.