

Cost Control

- Delivery Method:** Instructor-led eTraining
- Duration:** (4), (2) hours sessions
- Course Description:** This course provides interactive instruction of the fundamentals you need to use the Cost Control module of Prolog® Manager 2008. All instructors are experienced AEC industry professionals who can relate to your needs and answer your questions.
- Pre-requisites:** Successful completion of Prolog® Essentials is suggested.

Lessons

Introduction

1. About Prolog® Manager
2. About Cost Control
3. Course Objectives
4. Personas

Access and Navigation

1. Accessing Prolog® Manager
2. Prolog® Manager Main Window
3. Data Entry Forms
4. Creating a New Record
5. Using List Views
6. Getting Help and Support in Prolog® Manager
7. Review Questions

Budget

1. Budget Overview
2. Budget Code Setup Workflow
3. Getting Around the Budget Form
4. Default Budget Code Structure
5. Creating a Budget Code
6. Reviewing a Budget Code – Financial Tab
7. Entering Budget Code – Quantities
8. Entering Budget Code – Time
9. Entering Budget Code – Forecasting
10. Budget Reports – Forecasting
11. Budget Reports – Quantities
12. Budget Reports – Time
13. Budget Reports – Budget Codes
14. Review Questions

Budget Control

1. Budget Control Overview
2. Reviewing an Automatic Budget Code Transaction Entry
3. Creating a Budget Control Record for Savings
4. Reviewing Changes to the Budget
5. Reviewing Budget Control Reports
6. Review Questions

Contracts

1. Contracts Overview
2. Getting Around the Contracts Form
3. Contract Types
4. Creating a Prime Contract
5. Creating a Prime Contract – Contract Amounts
6. Entering Contact Information
7. Inclusions, Exclusions and Alternates
8. Linking Contract Attachments
9. Linking Drawings and Specifications
10. Creating a Subcontract
11. Creating a Subcontract – Contract Amounts
12. Reviewing Changes to the Budget
13. Sending an Approval Letter
14. Subcontract Change Orders
15. Creating a Unit Price Contract
16. Creating a Unit Price Contract – Contract Amounts
17. Contracts Reports
18. Review Questions

Purchase Orders and Purchase Order Catalogue

1. Purchase Orders Overview
2. Creating a Purchase Order Catalogue Record
3. Creating a Purchase Order
4. Creating Purchase Order Items
5. Including Purchase Order Tax Information
6. Linking Purchase Order Items to Schedule Tasks and to a Material Inventory Record
7. Printing a Purchase Order
8. Purchase Order Material Not Delivered
9. Review Questions

Potential Change Order

1. Potential Change Order Overview
2. Change Management Process Overview
3. Budget and Cost Allocations for PCO Items
4. Creating a Potential Change Order
5. Creating a Potential Change Order Items
6. Sending a Notification of Change
7. Sending a Request for Proposal
8. Updating a PCO with Proposed Amounts
9. Creating a Change Order Request Letter
10. Updating a PCO with Approved Amounts
11. Potential Change Order Reports
12. Reviewing Changes to the Budget
13. Closing a Potential Change Order
14. Potential Change Order Backcharge
15. Potential Change Order Internal Change
16. Review Questions

Change Order Requests

1. Change Order Requests Overview
2. Creating a Change Order Request
3. Change Order Request for Client Signature
4. Approving a Change Order Request
5. Change Order Requests Not Completed
6. Review Questions

Prime Contract Change Orders

1. Prime Contract Change Orders Overview
2. Creating a Prime Contract Change Order
3. Prime Contract Change Order for Signature
4. Approving and Closing a Prime Contract Change Order
5. Reviewing the Other Information Tab
6. Review Questions

Subcontract Change Orders

1. Subcontract Change Orders Overview
2. Creating a Subcontract Change Order
3. Subcontract Change Order for Signature
4. Reviewing Changes to the Budget
5. Subcontract Change Orders Not Executed
6. Closing a Subcontract Change Order
7. Review Questions

Application for Payment

1. Application for Payment Overview
2. Creating an Application for Payment
3. Adding a Change Order to an Application for Payment
4. Reviewing Financial Summary Information
5. Updating Approval and Category Information
6. Reviewing Changes to a Revenue Code
7. Reviewing Application for Payment Reports
8. Applications for Payment Not Paid
9. Review Questions

Contract Invoices

1. Contract Invoices Overview
2. Creating a Contract Invoice
3. Adding a Change Order to a Contract Invoice
4. Reviewing Financial Summary Information
5. Updating Approval and Category Information
6. Reviewing Changes to the Budget
7. Reviewing Contract Invoice Reports
8. Review Questions

General Invoices

1. General Invoices Overview
2. A General Invoice Linked to a Purchase Order
3. General Invoice for General Conditions – Labor
4. Creating a General Invoice from an Existing General Invoice Record
5. Printing General Invoice Reports
6. General Invoices Not Paid
7. Review Questions

Revenue Codes

1. Revenue Codes Overview
2. Creating a Revenue Code
3. Associating a Revenue Code with a Prime Contract
4. Associating a Revenue Code with a Potential Change Order
5. Associating a Revenue Code with a Prime Contract Change Order
6. Associating a Revenue Code with an Application for Payment
7. Associating a Revenue Code with Budget Codes
8. Reviewing Revenue Code Budget Reports
9. Review Questions