

## Document Control

- Delivery Method:** Instructor-led eTraining
- Duration:** (3), (2) hours sessions
- Course Description:** This course provides interactive instruction of the fundamentals you need you need to use the Document Control module of Prolog® Manager 2008. The course is designed to emulate the progression of a construction project using Prolog® Manager. 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 Document 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

#### Conversation Log

1. Conversation Log Overview
2. Creating a Record of Conversation
3. Following Up on Important Conversations
4. Reviewing Conversation Log Reports
5. Managing Unresolved Conversations
6. Review Questions

#### Request for Information

1. Request for Information Overview
2. Creating a RFI Record
3. Entering the Question Information
4. Linking Drawings and Specifications to an RFI
5. Collaborating on a RFI
6. RFI Answer and Impact
7. RFI Attachments
8. RFI Notification Wizard – Prolog® Website
9. E-mailing RFI Records
10. RFIs Reports
11. Request For Information and Prolog® Today
12. Review Questions

### Meeting Minutes

1. Meeting Minutes Overview
2. Creating a New Meeting Minutes Record
3. Meeting Logistics Setup (Location and Attendees)
4. Creating New Meeting Items and Assigning Responsibility
5. Customizing the Meeting Items Grid for Easier Use
6. Creating Meeting Minutes Using a Previous Meeting
7. Reviewing Meeting Minutes Reports
8. Managing Outstanding Meeting Minute Items
9. Review Questions

### Issues

1. Issues Overview
2. Creating an Issues Record
3. Using the Build Issues Wizard
4. Closing an Issue and Linking to a Potential Change Order
5. Linking Prolog® Manager Records to Issues
6. Reviewing Issues Reports
7. Issues with Cost Impacts
8. Review Questions

### Hotlist

1. HotList Overview
2. Creating a HotList Record and Setting a Reminder
3. Assigning a HotList Record and Updating the Resolution
4. Logging in as Administrative Assistant to Document Resolution
5. Closing the HotList Record
6. Creating and Linking HotLists from Other Forms
7. Reviewing HotList Reports
8. HotList and Prolog® Today – Managing Your Work
9. Review Questions

### Drawings Management

1. Drawing Management Overview
2. Creating a Drawing Record
3. Creating New Drawing Records from Existing Drawing Records
4. Creating a Specification Record
5. Creating a Drawing Package
6. Linking Drawings and Specifications to a Drawing Package
7. Tracking Drawing Packages in the Collaboration Grid
8. Drawing Batch Update Wizard
9. Reports for Drawing Management
10. Review Questions

### Submittal Management

1. Submittal Management Overview
2. Submittal Management Workflow
3. Submittal Register Overview
4. Logging a Submittal Item in the Submittal Register
5. Set the Due Date for a Submittal Item
6. Creating Submittal Items from an Existing Submittal Register
7. Printing a Submittal Register Report
8. Submittal Package Overview
9. Creating a Submittal Package Record
10. Entering Author Information for a Submittal Package
11. Linking Submittal Items to a Submittal Package
12. Entering Submittal Package Reviewer Information
13. Printing Submittal Package Reports
14. Updating Submittal Package Review Information
15. Creating a Package Revision and Closing a Package
16. Submittal Transmittal Overview
17. Submittal Transmittal to the Submittal Reviewer
18. Submittal Transmittal to the Author Company (Trades)
19. Printing a Submittal Transmittal Coversheet
20. Review Questions

### Transmittals & Correspondence Log

1. Transmittals & Correspondence Overview
2. Creating a Transmittal Record
3. Transmittal Details and Acknowledgement
4. Distribution List
5. Duplicating Transmittals
6. Quick Transmittal Feature
7. Transmittal and Courtesy Copy Wizard
8. Reports for Transmittals & Correspondence Log
9. Review Questions

### Closeout Log

1. Closeout Log Overview
2. Creating a Closeout Log Record
3. Receiving Closeout Log Items
4. Reviewing Closeout Log Reports
5. Managing Reports by Applying a Filter
6. Review Questions