

CHANGE ORDERS

Lesson Plan - October 18, 2021

At the end of the *Change Orders* lesson, the client and targeted users will be able to use all the necessary functionalities to manage change orders in **maestro***.

Unit CHAN01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this lesson is to clarify the needs and requirements to manage change orders in maestro*, as well as perform the basic configurations related to the latter.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"> • General Ledger; • Projects; • Security; • Lump Sum Billing; • Cost Plus Invoicing; • Progress Billing. <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none"> • Document Management; • Contact Management; • Order Management; • Subcontracts; • Catalogue; 	<ul style="list-style-type: none"> • Analysis • Configurations (Projects module): <ul style="list-style-type: none"> • Change Orders. 	<ul style="list-style-type: none"> • Discussion on the current and future process of change order management (strengths and weaknesses); • Discussion on the types of transactions that can be entered in maestro* (specific cases); • Set up of the required configurations for the implementation; • Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Reflect on the discussions. 	30 min.	<ul style="list-style-type: none"> • Training document CHAN01 • Concept - Project Issues and Change Orders 	Pilot

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<ul style="list-style-type: none"> Issue Management. 					

Unit CHAN02 - Configurations - Change Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client and designated users will be able to define and configure the parameters necessary to manage change orders in maestro*.</p>	<ul style="list-style-type: none"> Approval Codes Table; Approval Workflow; Resource Management. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Explanation and completion of the windows, in maestro*, linked to the accounts payable, according to the client's needs and the software's requirements, to automate data entry; <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Finalize data entry. 	30 min.	<ul style="list-style-type: none"> Training document CHAN02 	Pilot

Unit CHAN03 - Operations - Change Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client and designated users will be able to perform operations linked to change orders in maestro*.</p>	<ul style="list-style-type: none"> Change Order Management 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Explanation and completion of the change order management windows in maestro*, according to the client's needs and software requirements to automate data entry; Demonstration of available transfers; Streamlined Activity Management; Material List; Configuration window. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Practice entering transactions;</i> <i>Test the approval workflow, if needed.</i> 	<p>2h</p>	<ul style="list-style-type: none"> Training document CHAN03 	<p>Pilot and/or Super Users</p>

Unit CHAN04 - Operational Training on Change Orders

Optional Session - Training of the Client's Employees with the Implementation Specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
At the end of this lesson, the client and designated users will be able to perform the operations linked to change orders in maestro *	<ul style="list-style-type: none"> Change Order Management. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Explanation and completion of the change order management windows in maestro*, according to the client's needs and software requirements to automate data entry; Demonstration of available transfers; Streamlined Activity Management; Material List; Configuration window. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Practice entering transactions; Test the approval workflow, if needed. 	2h	<ul style="list-style-type: none"> Training Document - CHAN03 	Pilot Super Users Users

Unit CHAN05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and identified users will be able to use maestro* 's analysis and report tools to find the information they need to manage change orders.	<ul style="list-style-type: none"> Project Inquiry; Change Order Inquiry; Order Inquiry; Change Order List; Change Order Report. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validation of reports and inquiries. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate data entered in maestro*. 	15 min.		Pilot Super Users Users

Unit CHAN06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the client will be able to use the standard maestro* forms defined to meet their needs.	<ul style="list-style-type: none"> Original Contract; Change Orders; Work Progress. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Adjustment of standard maestro* forms. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate the accuracy of the forms. 	To be Determined		Pilot

Unit CHAN07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client and designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.</p>	<ul style="list-style-type: none"> • Validation of the process; • Validation of committed costs; • Validation of accounting entries; • AP List. 	<ul style="list-style-type: none"> • Review of previous concepts and validation of completed tasks as homework; • Test Assistance; • Transaction validations; • Validation of reports and inquiry; • Review of configurations, if needed; • Review of the processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Complete integrated tests.</i> 	<p>45 min.</p>		<p>Pilot Users</p>

Unit CHAN08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client will have shown the necessary knowledge and skills to manage change orders in maestro* .	<ul style="list-style-type: none">• Validate learnings;• Review the security settings applied to the module.	<ul style="list-style-type: none">• Preparation of the next training lessons:<ul style="list-style-type: none">• Issue Management.	15 min.	Aquired competencies Form - AP	Pilot