PROJECT MANAGEMENT

Lesson Plan - April 19, 2021

At the end of the *Project Management* lesson, the customer and targeted users will be able to perform all the necessary configurations and actions to create projects in **maestro***.

UnitP01 - Preliminary Analysis

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
The objective of this lesson is to identify customer's project structure and project cost management needs to guide them on the PAG structure to use for their various operations. *PREREQUISITE* • *Company creation* *OPTIONAL PREREQUISITE* • *General Ledger*	• Presentation of the project concept in **maestro*** and the processes; • Impact and significance of the PAG; • Correlation between customer needs and feasibility; • Customer expectations in terms of project cost reports and financial statements.	• Discussion on the actual and future project structure; • Discussion on the currently used and desired reports; • Decision-making. *HOMEWORK* • *Reflect on the discussions;* • *Provide the reports and financial statements of current projects;* • *Determine the list of activities of the whole company.*	6h	• Concept - Project Management in **maestro***	Pilot President(s) and Director(s)

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UnitP02 - Creating Project Templates

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

By the end of this lesson, the customer and designated users will be able to create project templates in **maestro*** and define their components (activities and groups).	• Definition of the nomenclature/structure of activities;
	• Creating project templates:
	    • Balance sheet / Income Statement
	    • Different project types
	    • Equipment
	    • Departments
	• Explain the link between general ledger accounts and templates;
	• Account group management.
		HOMEWORK
		
		• *Create a project template for each project type;*
		• *Prepare the budget(s) to import in an Excel file.*
			3h	• Concept - Project management in **maestro***
				• Concept - Accounting and financial statements
				• Training document P02
					Pilot
					
					Users

UnitP03 - Creating Projects and Budget Imports

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

	• Define Project Categories;
	• Define Project Type;
	• Define Project Departments;
	• Creating a Project:
	    • Budget import (from an Excel file);
	    • Models for recurring budgets;
	    • Master project and sub-project concept.
	• Close a Project;
	• Reopen a Project;
	• End a Project;
	• Delete a Project.
		• Review of the created project templates.
		
		HOMEWORK
		
		• *Create the various projects in* **maestro***
			3h	• Training document P03	Pilot
					
					Users

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UnitP04 - Project Analysis and Follow-ups

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the customer will be able use advanced functionalities linked to project management. They will be able to perform the required follow-ups, generate reports, and view project data, as much on paper as in **maestro***.	• Transfers: • Transfer of Funds; • Project-to-Project Transfer; • Advanced Project-to-Project Transfer; • Enter Advanced Contingencies; • Production; • Project Progress; • Reports: • Verification List (project transactions); • Control Reports (miscellaneous reports); • Pivotal Project Analysis (3); • Project Inquiry; • Micellaneous Reports.	*HOMEWORK* • *Analyse and compare reports*	6h	• Training document P04 • Concept - Projections, Budgets, and Construction Contingencies • F1 - Miscellaneous Reports	Pilot Users

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UnitP05 - Operational Training on Project Creation and Analysis

Optional Session - Training of the client's employees with the implementation specialist

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, users will be able to create projects in **maestro***, import budgets linked to these projects, and perform follow-ups by viewing various reports.	- Creating projects; - Completing and import budgets; - Transfer budgets between activities; - Transfers: - Transfer of Funds; - Project-to-Project Transfer; - Advanced Project-to-Project Transfer; - Enter Advanced Contingencies; - Production - Project Progress - Reports: - Verification List (project transactions); - Control Reports (miscellaneous reports); - Pivotal Project Analysis (3); - Project Inquiry; - Micellaneous Reports.		6h	- Concept - Project Management in **maestro*** - Concept - Projections, Budgets, and Construction Contingencies - Training documents P03 & P04 - F1 - Miscellaneous Reports	Users

UnitP06 - Tests and Validation

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer 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.	• Project Inquiry; • Job Costing Report; • Financial Statements per Project.	• Review of previous concepts and validation of completed tasks as homework; • Test Assistance; • Transaction Validations. *HOMEWORK* • *Complete Integrated Tests*	5h		Pilot Users

UnitP07 - Conclusion

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

By the end of this lesson, the customer will have shown the necessary knowledge and skills to create and analyse projects in **maestro***.	• Validate learnings;
	• Review the security settings applied to the module.
		• Preparation of the next training lessons:
		  • Accounts Payable;
		  • Accounts Receivable;
		  • Procurement;
		  • Subcontracts
			1h	Aquired competencies Form - AP	Pilot