

DEFINE RESOURCES BY PROJECT

Lesson Plan - October 12, 2021

At the end of the *Define Resources by Project* lesson, the customer and targeted users will be able to perform all the necessary configurations and actions to manage resources by project inquiries in **maestro***.

Unit RES01 - Preliminary Analysis

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this lesson is to clarify the needs, requirements, and conditions for using project resources in maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Projects;</i>• <i>Security.</i> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Document Management;</i>• <i>Contact Management;</i>• <i>Catalogue Management;</i>• <i>Quotation/Estimating.</i>	<ul style="list-style-type: none">• Analysis.	<ul style="list-style-type: none">• Discussion on the current and future processes;• 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">• <i>Reflect on the discussions.</i>	30 min.	<ul style="list-style-type: none">• Training document RES01¹	Pilot

¹This training document is under development.

Unit RES02 - Project Resources

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
The objective of this lesson is to perform the necessary configurations and show to the different elements linked to project resources and applicable to the company.	<ul style="list-style-type: none">Project Resources.	<ul style="list-style-type: none">Explanation and completion of the various project resource windows, according to the client's needs and software requirements;Import of project resources through an Excel file, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"><i>Complete databases;</i><i>Complete the project resource Excel file.</i>	30 min.	<ul style="list-style-type: none">Training document RES02^I	Pilot and/or Super Users

^IThis training document is under development.

Unit RES03 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and identified user will be able to use maestro* 's analysis and report tools to find the information they need to manage project resources.	<ul style="list-style-type: none">Progress of Resources;Resources by Project Inquiry.	<ul style="list-style-type: none">Review of previous concepts and validation of completed tasks as homework;Validation and configuration of the Progress of Resources report. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"><i>Validate data entered in maestro*.</i>	30 min.	<ul style="list-style-type: none">Training document RESS03^I	Pilot Super Users and/or Users

^IThis training document is under development.

Unit RES04 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
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.	<ul style="list-style-type: none"> Validation of the project resources workflow. 	<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 processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Complete Integrated Tests. 	1h		Pilot Users

Unit RES05 - 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 use project resources 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"> Requisitions 	30 min.	Acquired competencies form - RESS ¹	Pilot

¹This training document is under development.

