

QUARRY TICKETS

Lesson Plan - April 13, 2023 version

By the end of the *Quarry Tickets* lesson, the client and targeted users will be able to set up all the configurations and perform all operations linked to managing quarry tickets in **maestro***.

Unit QUARRY01 - 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, requirements, and conditions to using quarry tickets and setting up the basic configurations linked to using the module to this effect in maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Accounts Receivable;</i>• <i>Accounts Payable;</i>• <i>Project Management;</i>• <i>Security Management;</i>• <i>Catalogue Management.</i> <p><i>OPTIONAL PREREQUISITE</i></p> <ul style="list-style-type: none">• <i>Equipment Management.</i>	<ul style="list-style-type: none">• Analysis;• Configuration (Quarry Tickets module).	<ul style="list-style-type: none">• Discuss the current and future process to manage quarry tickets (strengths and weaknesses);• Set up of the required configurations for the implementation;• Validate the import protocol;• Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• <i>Reflect on the discussions.</i>	1.5h	<ul style="list-style-type: none">• Training document QUARRY01¹	Pilot

¹This training document is under development.

Unit QUARRY02 - Necessary Settings to Manage Quarry Tickets

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to set up the configurations of elements necessary to managing quarry tickets in maestro *.	<ul style="list-style-type: none"> • Transport Rates; • Product Group Table (optional); • Define Regions; • KM Range Management; • Truck Management; • Supplier Rates; • Define Source Pricing; • Define Surcharge Types; • Transport Surcharge Table; • Fuel Price Table; • Catalogue Management; • Project Management. 	<ul style="list-style-type: none"> • Explanations and completion of the windows in maestro* that are linked to managing quarry tickets, according to the client's needs and system requirements, to automate data entry. <p>HOMEWORK</p> <ul style="list-style-type: none"> • <i>Finalize data entry.</i> 	3h	<ul style="list-style-type: none"> • Training document QUARRY02^I 	Pilot and/or Super Users

^IThis training document is under development.

Unit QUARRY03 - Opérations I01

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to perform the quarry ticket management process operations in maestro* .	<ul style="list-style-type: none"> • Ticket Entry - Invoicing; • Ticket Management (import, if applicable); • Create Intercompany Tickets; • Advanced Ticket validation and Inquiry; • Advanced Quarry Ticket Invoicing; • Ticket Entry - Costing; • Invoicing Reconciliation; • Batch Invoicing Reconciliation; • Cost Transfer from Tickets; • Inventory Adjustment; • Reconciliation of Receipts; • Transportation Accrued Cost Accounting; • Material Accrued Cost Accounting. 	<ul style="list-style-type: none"> • Review of previous concepts and validation of completed tasks as homework; • User training according to the process established at the time of the analysis; • Demonstration of the different options and methods to process quarry tickets in maestro* (internal - receivables - payables). <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Practice entering transactions. 	6h	<ul style="list-style-type: none"> • Integrated Tests • Training document QUARRY03^I 	Pilot and/or Super Users

^IThis training document is under development.

Unit QUARRY04 - Operational Training on Quarry Tickets

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 training session, the users will be able to perform the different operations linked to managing quarry tickets in maestro* .	<ul style="list-style-type: none"> Ticket Entry - Invoicing; Ticket Management (import, if applicable); Create Intercompany Tickets; Advanced Ticket validation and Inquiry; Advanced Quarry Ticket Invoicing; Ticket Entry - Costing; Invoicing Reconciliation; Batch Invoicing Reconciliation; Cost Transfer from Tickets; Inventory Adjustment; Reconciliation of Receipts; Transportation Accrued Cost Accounting; Material Accrued Cost Accounting. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; User training according to the process established at the time of the analysis; Demonstration of the different options and methods to process quarry tickets in maestro* (internal - receivables - payables). <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Practice entering transactions. 	3h	<ul style="list-style-type: none"> Training document QUARRY03^I 	Pilot Super User and/or Users

^IThis training document is under development.

Unit QUARRY05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and identified users will be able to use the maestro* analysis, inquiry, and report tools to find the information they need to manage quarry tickets.	<ul style="list-style-type: none"> Ticket List; Product Sales Analysis; Delivery Report; Pivotal Sales Analysis; Lien Analysis; Customer Inquiry; Catalogue Inquiry; Supplier Inquiry; Project Inquiry. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validate quarry ticket reports and inquiries. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate data entered in maestro*.</i> 	1.5h	<ul style="list-style-type: none"> Training document QUARRY05¹ 	Pilot Super User and/or Users

Unit QUARRY06 - 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"> Invoice Form. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validate and adjust standard maestro* invoicing forms. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate the accuracy of the forms.</i> 	To be determined		Pilot

¹This training document is under development.

Unit QUARRY07 - 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"> Ticket Import; Ticket Invoicing; Cost Transfer from Tickets. 	<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 inquiries; Review of configurations, if needed; Review of the processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Complete Integrated Tests. 	3h		Pilot Users

Unit QUARRY08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client will have demonstrated they have the necessary skills and knowledge to manage quarry tickets 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 session: <ul style="list-style-type: none"> Quarry Quotations. 	30 min.	Acquired competencies form - QUARRY ¹	Pilot

¹This training document is under development.

