

SUBCONTRACTS

Lesson Plan - October 15, 2021

At the end of the *Subcontracts* lesson, the client and targeted users will be able to perform all the necessary configurations, actions, and follow-ups to manage subcontracts in **maestro***, including change orders, orders, approval workflow, construction work progress, etc.

Unit SUBC01 - 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 manage subcontracts in maestro*, as well as perform the basic configurations linked to subcontracts in the Purchasing module.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• General Ledger;• Projects;• Security.• Accounts Payable (AP) <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none">• Document Management;• Contact Management..	<ul style="list-style-type: none">• Analysis• General Settings (Purchasing module):<ul style="list-style-type: none">• General• Subcontract	<ul style="list-style-type: none">• Discussion on the current and future process of subcontract management (strengths and weaknesses);• Discussion on the types of transactions to enter in maestro* (specific cases);• Set up of the required configurations for the implementation;• Decision-making.• Discussion on the accrued costs - subcontracts. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• Reflect on the discussions.	15 min.	<ul style="list-style-type: none">• Training document SUBC01¹	Pilot

¹This training document is under development.

Unit SUBC02 - Configurations - Subcontracts

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will be able to define and configure the parameters necessary to manage subcontracts in maestro *.	N/A	N/A	N/A	N/A	N/A

Unit SUBC03 - Operations - Subcontracts

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will be able to perform all operations linked to subcontracts and/or change orders in maestro *.	<ul style="list-style-type: none"> Subcontracts; <ul style="list-style-type: none"> Residential type (optional). Subcontractor Work Progress. Order Invoicing. Order Status Codes Table. Approval Workflow. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Explanation and completion of the Subcontract window, according to the needs of the client and the software requirements, to automate data entry. Change Orders. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Practice entering transactions; Test the approval workflow, if 	1.5h	<ul style="list-style-type: none"> Training document SUBC03¹ 	Pilot and/or Super Users

¹This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		applicable.			

Unit SUBC05 - Operational Training on Subcontract Management

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 perform the various types of transactions and operations necessary and specific to the management of subcontracts in maestro *.	<ul style="list-style-type: none"> Subcontracts; Subcontractor Work Progress; Order Status Codes Table; Approval Workflow. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Explanation and completion of the Subcontract window, according to the needs of the client and the software requirements, to automate data entry. <p>HOMEWORK</p> <ul style="list-style-type: none"> Practice entering transactions; Test the approval workflow, if applicable. 	3h	<ul style="list-style-type: none"> Training document - SUBC04¹ 	Pilot Super Users Users

¹This training document is under development.

Unit SUBC06 - 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 subcontracts.	<ul style="list-style-type: none"> Order Inquiry Supplier Inquiry Project Inquiry Contract Analysis Subcontract Invoicing Analysis 	<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"> <i>Validate data entered in maestro*.</i> 	15 min.	<ul style="list-style-type: none"> Training document SUBC06¹ 	Pilot Super Users Users

Unit SUBC07 - 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 Subcontract Change Orders Work Progress 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validation and definition of modifications to be made to the forms, if required. <p><i>HOMEWORK</i></p>	To be Determined	<ul style="list-style-type: none"> Training document SUBC07² 	Pilot

¹This training document is under development.

²This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<ul style="list-style-type: none"> Validate the accuracy of the forms 			

Unit SUBC08 - 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 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>HOMEWORK</p> <ul style="list-style-type: none"> Complete Integrated Tests 	45 min.		Pilot Users

Unit SUBC09 - 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 and manage subcontracts 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">• Change Orders• Issue Management	15 min.	Acquired competencies form - SUBC^I	Pilot

^IThis training document is under development.