

## Project Management Class

**Who:** Project managers, administrators, or other personnel working with initial job setup and ongoing job documentation, including contact management, document tracking, RFIs, submittals, and meeting minutes.

**Content:** Two days of hands-on experience with the Project Management (PJ) module, including use of features for contact management, job setup, submittals, RFIs, transmittals, custom logs, and contract control. Day two focuses on Contract Control, including Change Management, Subcontracts and Purchase Orders.

**Credit:** CPAs successfully completing this course will receive a CPE certificate. CIS Consulting Group is a CPE sponsor with the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh NC 27605

**Prerequisites:** A familiarity of Microsoft® Windows®. We encourage clients to familiarize themselves with the software prior to attending.

**Class Rates:**

One Day: \$450 1st participant, \$400 each additional  
Two Day: \$800 1st participant, \$700 each additional

**Registration:**

Please fax completed registration form to 704-394-0052 or register online at [www.cisinfo.com/classroom.htm](http://www.cisinfo.com/classroom.htm) for more information please call 704-393-0038 x1142

Course Outline

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**DAY ONE**

**Setup Project Management**

- PJ Settings and Send Settings

**Setup Address Book Contacts**

- Set up Companies and Person Contacts

**Submittals**

- Create and Send a Submittal
- Track Submittals with Reports/Inquiries

**Requests for Information (RFI)**

- Create and Send an RFI
- Track RFIs with Inquiries and Reports

**Transmittals**

- Create and Send a Transmittal

**Meeting Minutes**

- Manage New Meeting Minutes

**Correspondence Log**

- Enter Correspondence in PJ
- Record Microsoft Office Correspondence

**Drawing Logs**

- Enter New Drawings
- Enter Revisions

**Custom Logs**

- Enter Information to Customer Logs
- Create a New Custom Log

**DAY TWO**

**Change Management Settings**

**Enter Estimates**

- Enter Estimates
- Review Estimates with Inquiries

**Contract Structure**

- Contract Overview
- Job Links and Reporting

**Commitments**

- Purchase Order & Subcontract Commitment
- Correcting Commitments

**Change Request**

- Creating Change Requests
- Vendor Quotes and Change Request Logs
- Pricing Methods on Price/Cost Estimate tab

**Change Orders**

- Enter and View Change Orders
- Updating Job Cost Estimate
- Release to Accounting/Revise Contract Amount

**Commitment Change Orders**

- Change and Order Log & Commitment Reports

**Contract Based Invoices**

- Amounts to Bill
- Edit, Approve & Print a Contract-Based Invoice

**Miscellaneous Worksheets**

- Overview
- Enter Contract Amounts