

Primavera Contract Management Rel 13

Duration: 3 Days

What you will learn

This course provides hands-on training for Primavera's Contract Manager solution, focusing on project cost control and document management. Additional topics include logging and tracking submittals, recording project communication, awarding procurement items, and using contracts, purchase orders, and trends. Numerous workshops reinforce new functionality and skills.

Professional Development and Continuing Education Units:

Earns 19.5 PDUs and 1.95 CEUs

Learn to:

- Document submittals and submittal packages
- Link documents and attachments to an issue
- Create distribution lists from contacts in project
- Define the Cost Worksheet
- Distribute document values to the Cost Worksheet
- Record and view drawing logs

Audience

- Business Analysts
- End Users
- Functional Implementer
- Project Manager

Prerequisites

Required Prerequisites

Functional knowledge of MS Windows and Internet Explorer

Course Objectives

- Create a Project
- Track Drawings
- Communicate Project Information
- Log and Track Submittals
- Document Project Issues
- Record Project Communications
- Create the Company Directory
- Manage Project Costs
- Award Procurement Items
- Use Contracts, Purchase Orders, and Trends
- Manage Payment Requisitions

Course Topics

Introduction to Contract Manager

- Identify the advantages of using Contract Manager
- Log in to Contract Manager
- Identify Contract Manager's components in the Main window
- Customize the Project View in the Main window
- Customize the Control Center in the Main window

Creating the Company Directory

- Add a new company
- Create contacts
- Edit contact information
- Distinguish between group and project contacts
- Copy contacts from another project
- Create distribution lists from contacts in project
- Designate companies or contacts as inactive

Create a Project

- Create a project using the New Project wizard

Tracking Drawings

- Review the distribution process
- Record and view drawing logs
- Create transmittals from distribution lists
- Use the transmittal queue
- Package a group of drawings as a set
- Add multiple drawings to the drawing set
- Distribute drawings to project participants

Communicating Project Information

- Create letter templates
- Add letters
- Document a telephone record
- Enter a request for information
- Record an answer to a request for information

Logging and Tracking Submittals

- Document submittals and submittal packages
- Assign a status to submittals
- Identify the responsible person (Ball in Court)
- Incorporate multiple reviewers in the cycle
- Create transmittals from submittals
- Use Dunning letters to notify parties

Documenting Project Issues

- Define an issue
- Create an issue
- Link documents and attachments to an issue

Document an issue by searching through project documents and attachments

Recording Project Communications

- Create daily reports
- Document daily progress
- Generate daily reports and meeting minutes
- Record and print meeting minutes

Managing Project Costs

- Define the cost process in a project
- View a cost coding structure
- Define the Cost Worksheet
- Explain how document values are distributed
- View the source documents from a cost code

Awarding Procurement Items

- Document bids
- Compare bids
- Award procurement items

Using Contracts, Purchase Orders, and Trends

- Add contracts and purchase orders
- Distribute document values to the Cost Worksheet
- Use Trends to account for anticipated costs

Change Management

- Describe the change management workflow process
- Define change management phases
- Define the Project Settings for document flow
- Create, link, and reference change documents
- Trace estimated, quoted, negotiated, and final change values

Payment Requisitions

- Determine requisition options
- Generate a requisition from a contract
- Create a schedule of values
- Balance the requisition
- Retrieve approved change orders
- Record status for requisitions
- Distribute actual costs to the worksheet
- Certify and print requisitions

Approval Process

- Set up an approval process
- Configure the approval process for a document
- Use the approval process

Customizing Layouts

- Create a layout
- Filter a layout
- Sort a layout
- Group a layout

Export logs to Excel