SESSION DESCRIPTIONS

2017 TUG National Users Conference

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Track 1: Industry & Management Issues – Industry Issues ................................................................. 2
Track 2: Industry & Management Issues – Information Technology A ................................................. 3
Track 3: Industry & Management Issues – Information Technology B .................................................. 5
Track 4: Sage 100 Contractor – Accounting/Misc.................................................................................. 6
Track 5: Sage 100 Contractor – Project Management & Estimating ...................................................... 8
Track 6: Sage 100 Contractor – Alternate .............................................................................................. 10
Track 7: Sage Estimating (300 CRE) – General Estimating .................................................................. 10
Track 8: Sage Estimating (300 CRE) – Estimating Database ................................................................. 12
Track 9: Sage Estimating (300 CRE) – Integrated Solutions ............................................................... 13
Track 10: Sage Estimating (300 CRE) – Advanced Estimating ............................................................. 14
Track 11: Sage 300 CRE Beginning User – Sage 300 Financial Basics .................................................. 15
Track 12: Sage 300 CRE Beginning User – Sage 300 Project Management Basics ............................. 17
Track 13: Sage 300 CRE Experienced User – Controllers ................................................................... 19
Track 14: Sage 300 CRE Experienced User – Accounting ................................................................... 19
Track 15: Sage 300 CRE Experienced User – Operations/Project Accounting ...................................... 21
Track 16: Sage 300 CRE Experienced User – Developer/Property Manager ........................................ 22
Track 17: Sage 300 CRE Experienced User – Specialty/Service Contractor ........................................ 23
Track 18: Sage 300 CRE Experienced User – Payroll ......................................................................... 23
Track 19: Sage 300 CRE Experienced User – Forecasting & WIP Reporting ......................................... 24
Track 20: Sage 300 CRE Experienced User – In Depth Panel Discussion ........................................... 25
Track 21: Sage 300 CRE Fundamentals: Basics and Beyond – Contracts & Billing ............................. 25
Track 22: Sage 300 CRE Fundamentals: Basics and Beyond – MyAssistant .......................................... 25
Track 23: Sage 300 CRE Fundamentals: Basics and Beyond – Office Connector .................................. 26
Track 24: Ask the Experts – One-on-One Booth .................................................................................. 28
Track 25: Sage 300 CRE Reporting, SQL and ODBC/MS Applications – TS Reporting (ID, RD, & FS) ......................................................................................................................... 31
Track 26: Sage 300 CRE Reporting, SQL and ODBC/MS Applications – Crystal Reports .................... 32
Track 27: Sage 300 CRE Reporting, SQL and ODBC/MS Applications – Crystal Reports .................... 33
Track 28: Sage 300 CRE Reporting, SQL and ODBC/MS Applications – ODBC & Microsoft Access ................................................................................................................................. 34
Track 29: Sage or Other Vendor Sessions – Sage Presentations ............................................................ 35
Track 30: Sage or Other Vendor Sessions – Vendor Presentations ......................................................... 36
Track 31: Sage or Other Vendor Sessions – Vendor Presentations .......................................................... 37

**Note on session numbering: Sessions are numbered with the track number-timeslot. Track Numbers follow the top of the session grid, while the Timeslot numbers follow the left side of the grid. Please see the Session Grid for a visual. (Ex: The Information Technology Track A is Track 2, so an Information Technology Track A session held Wednesday from 4:00-5:30pm would be numbered as 2-12 in the session description)**
Track 1: Industry & Management Issues – Industry Issues

1-1 Audit Preparedness
**Session Level:** Basic  
**Who Should Attend:** Controllers, Accountants, Owners  
**Prerequisites:** None  
**Specific Learning Objectives:** Discussions about audit needs and requirements and how to use the software to help prepare for an audit.

1-2 Key Performance Indicators (KPI’s)
**Session Level:** Basic  
**Who Should Attend:** Controllers, Accountants, Owners  
**Prerequisites:** None  
**Specific Learning Objectives:** Discuss Key Financial Ratios--How they are computed--What they mean.

1-6 WIP Reporting Overview
**Session Level:** Intermediate  
**Who Should Attend:** Users of Sage 300 CRE Accounting software that create Work In Progress (WIP) Reports to compare current results to forecasts.  
**Prerequisites:** Attendees of this session should be familiar with Sage 300 CRE job costing.  
**Specific Learning Objectives:** This class will focus on standard issues facing controllers when preparing WIP reports and will discuss Best Practices for a variety of industry and company types. We will review what information is stored where in the Sage 300 CRE system and review workflow and reporting options.

1-7 Bridging the Gap: Operations & Accounting Working Together (1 of 2)
**Session Level:** Basic  
**Who Should Attend:** CPA’s, Owners, Controllers, Accounting and Project Managers  
**Prerequisites:** None  
**Specific Learning Objectives:** Project managers understand project management. Unfortunately, disconnect often exists between a project manager’s knowledge and the information needed to prepare accurate financial statements. This two-part workshop offers hands-on learning for project managers, accounting personnel and company owners. Steve Kirschner, Kirschner & Associates, P.C., brings to life the real-world ways job cost systems affect profitability. Why do timely and accurate job projections matter? What should construction personnel know about financial statements? How do you overcome the knowledge and communication gap between operations and accounting? If there is a large invoice not in project cost-to-date, does reported profit go up or down? You may be surprised. Learn the answers to these questions and more.

1-8 Bridging the Gap: Operations & Accounting Working Together (2 of 2) – See 1-7

1-11 Worker’s Comp Panel
**Session Level:** Intermediate  
**Who Should Attend:** Controllers  
**Prerequisites:** Basic Knowledge of Workers Comp Law, Procedures, and Related Sage Software reporting  
**Specific Learning Objectives:** We will discuss Workers Compensation from a Risk Management/Cost Control perspective, as well as how we track it in Sage Software. Attendees should be prepared to share information in a round table format.

1-12 Lien Waivers Panel
**Session Level:** Basic/Intermediate  
**Who Should Attend:** CFO’s, Controllers, Accounting Managers, and Subcontract Administrators  
**Prerequisites:** Knowledge of Subcontract and Lien Processes in Sage 300 CRE is helpful
Specific Learning Objectives: Are you effectively tracking and managing Lien and Subcontractor activity? Join us to review the enhanced features in Sage 300 CRE. We’ll open up for issues that companies experience so be sure to bring your questions!

1-13 Getting the Most Out of Your Sage Resources
Session Level: Basic
Who Should Attend: All Users
Prerequisites: None
Specific Learning Objectives: We’ll review how to contact sales and support, use your help topics, search the knowledgebase, access Sage City, and sign up for a class on Sage University. Learn tips and tricks to realize the potential resources available to you.

1-14 Getting the Most Out of Your TUG Membership
Session Level: Basic
Who Should Attend: All Users
Prerequisites: None
Specific Learning Objectives: This session will describe the benefits of TUG membership, including an overview of the TUG website and will provide detailed steps and tips & tricks to help you access and use various tools such as bulletin boards and how to sign up for monthly WebEx educational sessions.

Track 2: Industry & Management Issues – Information Technology A

2-1 SQL Querying and Views Lab (1 of 2)
Session Level: Basic
Who Should Attend: Anyone who wants to learn new ways to get data out of Sage
Prerequisites: None
Specific Learning Objectives: Have you ever wanted to take the power of Crystal Reports, Excel, Access, etc. to the next level? Though this course is not directed at any of these, it will teach you how to write basic SQL queries that can be used with all of them. This course will give you a basic understanding of SQL Querying. We will learn how to structure a SQL query and a handful of SQL functions. We will use a MS SQL Query editor to create simple but powerful queries. This will allow you to see and retrieve your data in ways you have never been able to before.

2-2 SQL Querying and Views Lab (2 of 2) – See 2-1

2-3 Sage Security
Session Level: Basic
Who Should Attend: Anyone responsible for configuring security in Sage 300 CRE
Prerequisites: None
Specific Learning Objectives: Sage 300 Security

2-4 How to Manage IT Staff When You Are Not IT
Session Level: Basic
Who Should Attend: Anyone who manages IT staff
Prerequisites: None
Specific Learning Objectives: In this session, we will give managers some insight and knowledge on how to manage IT staff without having IT knowledge. We will discuss methods for checks and balances, redundancy ideologies, policy and procedure structures, reporting, and more.

2-5 Sage Database Structure Including Estimating/SM/PO/IV/Property Management
Session Level: TBD
Who Should Attend: TBD
Prerequisites: TBD
Specific Learning Objectives: TBD

2-6 How to Make a Case for IT Investments
Session Level: Basic
Who Should Attend: Management or operations personnel responsible for implementing and maintaining business technology.
Prerequisites: None
Specific Learning Objectives: In this session, we will discuss what to consider when evaluating the need for technology investments. We’ll talk about building your business case with topics like needs analysis, return on investment, hard/soft costs, etc.

2-7 MS Excel Tips & Tricks (not Sage related)
Session Level: Intermediate
Who Should Attend: Anyone interested in improving Excel skills
Prerequisites: None
Specific Learning Objectives: In this part lecture, part roundtable discussion, we will explore different aspects of Excel.

2-8 Using Sage 300 CRE in Client/Server or Application Hosted Environments
Session Level: Intermediate
Who Should Attend: Anyone who managed Sage 300 CRE deployments
Prerequisites: A basic understanding of networking and server environments
Specific Learning Objectives: In this session, we will define and differentiate the pros and cons of deploying, maintaining, supporting, and using Sage 300 CRE in either a Client/Server environment or a virtual one hosted by RDS or Citrix. By analyzing the benefits and possible pitfalls of these environments, you can be better prepared to manage your Sage 300 CRE installation.

2-9 BI Tools
Session Level: Basic
Version: Sage 300 CRE 15.1 or better
Prerequisites: Knowledge of Database Structure
Specific Learning Objectives: Business intelligence (BI) is an umbrella term that includes the applications, infrastructure and tools, and best practices that enable access to and analysis of information to improve and optimize decisions and performance. In this session you will learn how to use your Sage data through ODBC and Excel, SQL and Data Warehouse to create Dashboards to use in the Daily management of projects and other financial decisions.

2-10 PDF Editors
Session Level: Basic
Who Should Attend: Anyone who uses PDF documents
Prerequisites: None
Specific Learning Objectives: Most of us work with PDFs on a daily basis, but may not have a full understanding of the capability, flexibility, and the compatibility of this powerful document format. In this session we will discuss the PDF document format and its place in the modern construction industry. We will explore the history of the PDF, its features, its benefits, its limitations, and the tools to make and edit your own PDF documents. This session will provide information for the most basic of users and to most experienced PDF handlers.

2-11 Underground World of Hacking *REPEAT SESSION*
Session Level: Basic
Who Should Attend: Anyone interested in the electronic threats we all face in today connect world....
Prerequisites: None
Specific Learning Objectives: Increase awareness of the threats we all face, what counter measures are available and to ask questions concerning the security of personal and corporate information.

2-12 Webifying Your Data
Session Level: Basic
Who Should Attend: Anyone who would like more information on creating a website
Prerequisites: None
Specific Learning Objectives: How to Webify Your Data – In this session you will learn about data integration techniques, how to identify the right type of vendor or employee to assist with the development, review hardware & software options, and have an opportunity to discuss your individual data challenges.

2-13 IT Security Awareness Training for Your Employees
Session Level: Basic
Who Should Attend: Anyone interested in understanding how to promote a security conscious organizational culture.
Prerequisites: None
Specific Learning Objectives: In this session, we will be discussing the importance of ongoing security awareness and education in any organization. We will cover some of the specific threats and what can be done to help protect against them.

2-14 Risk Management
Session Level: Basic
Who Should Attend: Anyone involved with managing and securing company data and technical operations.
Prerequisites: None
Specific Learning Objectives: In this session, we will be discussing the role of information security in your business, including security governance, compliance and ethics issues, security policies, business continuity, risk assessment and management, threat modeling, etc. We will also discuss the importance of ongoing security awareness and education in any organization.

Track 3: Industry & Management Issues – Information Technology B

3-2 Underground World of Hacking
Session Level: Basic
Who Should Attend: Anyone interested in the electronic threats we all face in today connect world....
Prerequisites: None
Specific Learning Objectives: Increase awareness of the threats we all face, what counter measures are available and to ask questions concerning the security of personal and corporate information.

3-7 Beyond the Basics: SQL Querying and Views Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Anyone with a basic knowledge of SQL querying
Prerequisites: Basic SQL Querying and Views
Specific Learning Objectives: Ready to take your Basic SQL Querying and Views knowledge to the next level? Then join us in this two-part lab session where we go beyond the basics. In this course, you will learn more functions as well as some tips and shortcuts to retrieve data in ways you never thought possible.
3-8 Beyond the Basics: SQL Querying and Views Lab (2 of 2) – See 3-7

3-11 How/When to Use SQL Views
Session Level: Basic
Who Should Attend: Anyone who wants more info on SQL
Prerequisites: None
Specific Learning Objectives: Do your reports take forever to run? Processing slow down as your data set grew? Then perhaps SQL Views are for you. In this session, we will discuss reasons for replicating your data into SQL, why using SQL views will speed up your reporting, and what applications can use a SQL view.

3-12 IT Talk for Non-IT People
Session Level: Basic
Who Should Attend: Anyone with IT Questions
Prerequisites: None
Specific Learning Objectives: What is Ransomware? What is an SSD drive? What is a QR Reader? How are Laptops and Ultrabooks different? In this session, we have a panel of IT professionals that will answer these IT questions and many more. Feel free to ask any IT question about IT that you want to know more about. Let us answer using “non-IT speak” in a way the you can relate to and understand. We promise you'll leave with more knowledge and understanding than you came in with.

Track 4: Sage 100 Contractor – Accounting/Misc.

4-1 Accounts Payable Best Practices
Session Level: Beginner to Advanced
Who Should Attend: A/P Personnel
Prerequisites: None
Specific Learning Objectives: This course will discuss ways to manage your Accounts Payable through best practices, which allows you to increase your efficiency and maximize your cash flow. Some topics that will be discussed are initial set up of vendors, ACH, credit card management and recurring payables.

4-2 Time & Material Billing
Session Level: Basic to Advanced
Who Should Attend: Accounting, Project Management
Version: Sage 100 Contractor V19.xx & V20.xx
Prerequisites: None
Specific Learning Objectives: In this class, we’ll explore the Time & Materials billing module in Sage 100 Contractor. We’ll go through the setup procedures involved, process the billings, and discuss unique billing situations.

4-3 Time is Money – The Importance of Accurate Time Keeping
Session Level: Basic
Who Should Attend: Anyone interested in best methods of tracking the elusive and unpredictable expense of job labor and how it impacts job cost.
Prerequisites: Basic knowledge of Sage 100 Contractor payroll helpful
Specific Learning Objectives: In this class, we will examine the best methods of tracking time from the field, what labor burden is and how it affects job cost, tracking labor for prevailing wage projects, analyzing labor cost reports and managing hours to complete.

4-4 Service Receivables Basics
Session Level: Basic
Version: 19 or 20
Who Should Attend: Those doing smaller, quick jobs or contract/maintenance type work and want to see how they might use Sage 100 Contractor’s service module to expedite their quoting and billing process.
Prerequisites: None
Specific Learning Objectives: Provide an introductory view of what the service module is in Sage 100 Contractor

4-5 Progress Billing
Session Level: Basic to Advanced
Version: Sage 100 Contractor Version 19.xx or Version 20.xx
Who Should Attend: Accounting, Project Management
Prerequisites: None
Specific Learning Objectives: In this class we'll explore the Progress Billing module in Sage 100 Contractor. We'll go through the setup procedures involved, process the billings, and discuss unique billing situations.

4-6 Hiring Competent Office Staff
Session Level: Basic
Version: Sage 100 Contractor Version 19.xx or Version 20.xx
Who Should Attend: Company Owners and HR Personnel
Prerequisites: None
Specific Learning Objectives: Successful hiring takes commitment to a carefully conceived and constructed hiring and retention philosophy and an accompanying program. In this session, we will discuss evaluating staffing needs, preparing for and interviewing prospects, making the selection, and employee orientation and training.

4-7 Estimating Basic Lab (1 of 2)
Session Level: Advanced
Version: 19
Who Should Attend: Those looking to enhance their abilities using the estimating module in Sage 100 Contractor.
Prerequisites: Sage 100 Contractor Basic Estimating Foundation Classes
Specific Learning Objectives: This lab will focus on using the more advanced techniques within Sage 100 Contractor’s integrated estimating to create more sophisticated estimates. This will include various ways to manage and update take-offs and the use of variables and formulas.

4-8 Estimating Basic Lab (2 of 2) – See 4-7

4-9 Accounting for Profitability Roundtable
Session Level: Basic to Advanced
Version: Sage 100 Contractor version 19.x or 20.x
Who Should Attend: Accounting
Prerequisites: None
Specific Learning Objectives: We will identify how to create and manage profits within your company by discussing various topics: Company Budgets, Asset Protection, Managing Risk, and Cash Flow. Bring your company's best practices, ideas, knowledge and strategies for an open class discussion.

4-10 Using Alerts, Dashboard, and Scheduled Reports
Session Level: Beginner
Who Should Attend: Accounting, Owners, Project Managers
Prerequisites: None
Specific Learning Objectives:
- Customizing your Dashboard for your own reporting needs
- Setting up reminders for scheduled reports, such as Work in Progress or Cash Flow
- Setting up alerts for such things as when cash flow goes below a certain dollar amount or when a project’s budget is being exceeded.

4-11 Form Design – Basics Lab
Session Level: Beginner
Who Should Attend: Users looking to learn the basic concepts of form design
Prerequisites: None
Specific Learning Objectives: This course will discuss general concepts related to forms and basic customization techniques. We’ll guide you through steps which will streamline your process for preparing correspondences to employees, vendors, and subcontractors.

4-12 Queries & Report Writing Basics Lab
Session Level: Intermediate
Who Should Attend: Accounting, Owners, Project Managers, Estimating
Prerequisites: None
Specific Learning Objectives:
- Learn how to make queries work to your advantage. Run queries on nearly any screen within Sage 100 Contractor.
- Basic Report Writing instruction, including adding vacation hours to an employee’s paycheck
- Includes things like where to save your report for others to access
- How to modify an existing report for your use
- How do the lines work, like Heading, or Detail or even subtotal
- Learn what all the tool icons do in the 13-3 Report Writer
- Learn about calculated fields
- Database principles of how the fields connect with each other

4-13 Sage 100 Contractor Tips & Tricks
Session Level: Beginner to Advanced
Who Should Attend: Accounting and Project Managers
Prerequisites: None
Specific Learning Objectives: This class is designed to expand your knowledge across various modules in Sage 100 Contractor. Learn methods to sharpen your skills to make your job easier, get a fresh look – or refresh your memory - on shortcuts, options and system features, and ways to “think outside the box.” Bring your own tips and tricks to share!

4-14 Is Your Equipment Making You Money?
Session Level: Basic
Who Should Attend: Anyone who owns heavy equipment and wants to know if their equipment is working for them.
Prerequisites: None
Specific Learning Objectives: How to track the true cost of owning equipment and maintaining your shop. How to accurately cost out your equipment to a job. Are you better off renting a piece of equipment when you need it? How equipment costs show up in job cost and how they impact your financial statements. Although we will mainly discuss equipment tracking in conjunction with the equipment tracking module in Sage 100, will also discuss alternative methods of tracking equipment without the Equipment Module as a tool.

Track 5: Sage 100 Contractor – Project Management & Estimating

5-1 Project Life Cycle
Session Level: Beginner to Advanced
Version: Sage 100 Contractor V19.x or V20.x
Who Should Attend: Accounting, Estimating, Project Management
Prerequisites: None
Specific Learning Objectives: Your company’s job profitability is dependent on four key components: accurate estimates, efficient job production, accurate accounting, and ongoing project analysis. We’ll briefly review each of these areas in preparation for more detailed class offerings throughout the Conference.

5-2 Benefits of Project Scheduling
Session Level: Intermediate
Version: 19 or 20
Who Should Attend: Those using Gantt charts in Sage 100 Contractor or considering doing scheduling in Sage 100 Contractor.
Prerequisites: A basic familiarity/understanding in using Gantt charts
Specific Learning Objectives: In this course, we are going to look beyond the basic charting experience and look to what additional tasks and functions can be performed using Sage 100 Contract’s scheduling module.

5-3 Budgets & Job Costing
Session Level: Intermediate
Who Should Attend: Accounting, Estimating, Owners, Project Managers
Prerequisites: None
Specific Learning Objectives:
- Basic concepts in job costing
- Understanding Cost Codes and divisions and how they affect your budgeting process
- Running reports to show how a job is doing financially
- Understanding where budgets come from and how they affect the rest of the business
- Discussion touches on the Estimating Module for foundation principals

5-4 Controlling the Paperwork with Document Control
Session Level: Basic
Who Should Attend: Project Managers, Office Managers
Prerequisites: None
Specific Learning Objectives: Proper documentation before, during, and after a project is crucial to your company’s long-term success. In this class you’ll see how to use the features in Document Control to communicate with your clients, subcontractors, and vendors to increase customer satisfaction, help finish jobs on time, and help protect yourself in case of litigation.

5-5 Productive Purchasing
Session Level: Basic
Who Should Attend: Those engaged in procuring the purchase of materials and/or tracking subcontractors
Prerequisites: Basic knowledge of Sage 100 Contractor helpful
Specific Learning Objectives: We will examine the cycle of tracking materials costs from estimate to RFP to PO’s to Payables. How to set up options to protect from overbilling and order only what is needed. Examining the subcontract process in Sage 100 from estimate to subcontract to change orders. Setting up options to protect from overbilling from subs. Issuing a PO vs a subcontract, issuing annual subcontracts.

5-6 Project Forecasting
Session Level: Intermediate
Who Should Attend: Accounting, Owners, Project Managers
Prerequisites: None
Specific Learning Objectives:
- Understanding Cost to Complete Module
- Communicating Work-In-Process Information to all departments
• Running reports to show how a job is doing financially
• How to track Man-Hours and subcontractor costs on a project
• Using the Scheduling module to assist in forecasting tasks

5-7 One-on-One Booth: Sage 100 Contractor: See session 24-7
5-8 One-on-One Booth: Sage 100 Contractor: See session 24-8
5-9 One-on-One Booth: Sage 100 Contractor: See session 24-9
5-10 One-on-One Booth: Sage 100 Contractor: See session 24-10

5-11 Estimating to Job Cost – Sage 100 & Sage 300 CRE: See 8-11
5-12 One-on-One Booth: Sage 100 Contractor: See session 24-12
5-13 One-on-One Booth: Sage 100 Contractor: See session 24-13
5-14 One-on-One Booth: Sage 100 Contractor: See session 24-14

Track 6: Sage 100 Contractor – Alternate

6-1 Audit Preparedness: See 1-1
6-2 Key Performance Indicators (KPI’s): See 1-2
6-4 How to Manage IT Employees When You Are Not IT: See session 2-4
6-6 WIP Reporting Overview: See 1-6
6-7 Bridging the Gap (1 of 2): See 1-7
6-8 Bridging the Gap (2 of 2): See 1-8
6-9 BI Tools: See session 2-9
6-10 PDF Editors: See session 2-10
6-11 Workers Comp Panel: See 1-11
6-12 Lien Waivers Panel: See 1-12
6-13 IT Security Awareness Training for Employees: See session 2-13
6-14 Risk Management: See session 2-14

Track 7: Sage Estimating (300 CRE) – General Estimating
7-1 Estimating Fundamentals Workshop Lab (1 of 3)
Session Level: Basic
Who Should Attend: Estimators
Version: Pervasive, concepts the same in SQL
Prerequisites: Before beginning this session, you should know how to perform basic takeoff and edit items in your estimate or database.
Specific Learning Objectives: This class will focus on the basics and fundamentals of the Sage Estimating program. After completing this class, you will be able to create an estimate file and generate an estimate using all types of takeoff. You will also be able to set-up and use WBS codes for reporting and set-up a Totals Page with add-ons.

7-2 Estimating Fundamentals Workshop Lab (2 of 3) – See 7-1
7-3 Estimating Fundamentals Workshop Lab (3 of 3) – See 7-1

7-4 SQL Estimating Overview Lab
Session Level: Intermediate
Who Should Attend: Estimators, Estimating Managers
Version: SQL
Prerequisites: None
Specific Learning Objectives: This hands-on session is designed to give you a primer on the SQL Estimating software with emphasis on the differences between the SQL version and the Pervasive version of Estimating. As the SQL product continues to be enhanced towards feature parity with Pervasive product each company will need to decide when it’s time to make the switch. This session is designed give you some of the information to decide if moving to the SQL product is right for your company at this time.

7-7 Estimating Tips & Tricks (1 of 2)
Session Level: Basic to Advanced
Who Should Attend: Estimators and others wishing to expand their knowledge of the use of the estimating software
Version: Pervasive
Prerequisites: A working knowledge of Sage Estimating
Specific Learning Objectives: A perennial conference favorite, in this interactive session we will explore the functionality of the estimating software with emphasis on real life tips and shortcuts. You will leave this session with new techniques to improve your estimating productivity and increase your estimating effectiveness. This session will be taught using a mix of the Pervasive and SQL versions of Estimating.

7-8 Estimating Tips & Tricks (2 of 2) – See 7-7

7-12 Sage Bid Management/ Sage Construction Project Center Overview
Session Level: Basic
Who Should Attend: Employees Managing the Bid Invitation process and Project Managers
Prerequisites: None
Specific Learning Objectives: Sage Bid Management/Sage Construction Project Center supports “true collaboration” between all internal and external project stakeholders. You’ll see first-hand how mobile access, sharing and visibility into project documentation helps streamline processes throughout pre-construction and all phases of construction ensuring successful and profitable projects.

7-13 Estimating Reports
Session Level: Intermediate
Who Should Attend: Estimators
Version: taught in SQL, concepts the same in Pervasive
Prerequisites: Attendees should understand the basics of WBS codes and general estimating practice.
Specific Learning Objectives: After completing this class you will be able to create, modify and save integrated estimating reports using the information in the current estimate as the basis for each report. You will be provided with the knowledge to customize reports and will learn how to select what’s included in a report, the order in which to sort the information, and how to adjust the level of detail. You will also learn how to preview the report on your screen, print to paper, and export to multiple file formats.

7-14 Resources, Crews, Rate Tables, and CCI’s
Session Level: Intermediate
Who Should Attend: Estimators, Estimating Managers
Version: taught in SQL, concepts the same in Pervasive
Prerequisites: Attendees of this session should be able to generate an estimate and have a basic understanding of crew based estimating.
Specific Learning Objectives: After completing this class you will have an understanding of what crews, resources, rate tables and city cost indexes (CCI) are and how to use them during the estimating process. You will also be able to edit existing and create your own crews, resources, and rate tables.

Track 8: Sage Estimating (300 CRE) – Estimating Database

8-1 Database Setup/Editor/Management Workshop Lab (1 of 3)
Session Level: Intermediate to Advanced
Who Should Attend: Intermediate and Advanced users who manage the Estimating database or who want to standardize the database
Version: Pervasive, concepts the same in SQL
Prerequisites: Basic understanding of the Estimating Database
Specific Learning Objectives: In this three-session interactive lecture/lab series we will discuss the creation and organization of a new database and the modification of existing databases. We will explore the impact of database decisions on the estimating process and see how modifications to the database can enhance the speed and accuracy of the estimates and improve estimate reporting. We will learn how to use Database Editor, an application bundled with estimating, to quickly create new group phases, phases and items. You’ll see how to make targeted and global modifications to edit descriptions, correct units, update prices, or change any database field quickly. You’ll see how to filter the items under review and to use layouts to view only the data you want to modify. This session will be taught using a mix of the Pervasive and SQL versions of Estimating.

8-2 Database Setup/Editor/Management Workshop Lab (2 of 3) – See 8-1
8-3 Database Setup/Editor/Management Workshop Lab (3 of 3) – See 8-1

8-9 Formulas & Assemblies (1 of 2)
Session Level: Basic/Intermediate
Who Should Attend: Estimators or database administrators - who develop, modify or improve their company’s Sage Estimating Database
Version: taught in SQL, concepts the same in Pervasive
Prerequisites: Before beginning this session, you should be familiar with your database setup and know how to perform basic takeoff
Specific Learning Objectives: Formulas are used to dramatically speed up the takeoff process in Estimating, and without them, Assemblies and Models will not function. In this session you will learn how to create variables, use variables to create formulas, use functions in formulas and create and use formula tables.

8-10 Formulas & Assemblies (2 of 2) – See 8-9
8-11 Formulas & Assemblies Lab (1 of 2)
Session Level: Basic/Intermediate
Who Should Attend: Estimators or database administrators - who develop, modify or improve their company’s Sage Estimating Database
Version: taught in SQL, concepts the same in Pervasive
Prerequisites: Attend two lectures on Formulas and Assemblies
Specific Learning Objectives: In this hands-on session, you will apply the concepts learned in the lecture to build formulas, variables, formula tables and assemblies.

8-12 Formulas & Assemblies Lab (2 of 2) – See 8-11

Track 9: Sage Estimating (300 CRE) – Integrated Solutions

9-4 Electronic Takeoff – eTakeoff with Bridge and On Center (2D) Lecture (1 of 2)
Session Level: Basic/Intermediate
Who Should Attend: Anyone who is using eTakeoff with Bridge, On-screen Takeoff, and anyone interested in implementing takeoff software
Version: SQL
Prerequisites: Attendees should understand the basic workflow of quantity takeoff, estimate creation, item and assembly input
Specific Learning Objectives: Attendees will come away from this session with an overall understanding of electronic takeoff options.

9-5 Electronic Takeoff - eTakeoff with Bridge Lab (2 of 2) – See 9-5

9-6 Bring Your Own Estimating Questions
Who Should Attend: Estimators
Prerequisites: None
Specific Learning Objectives: Bring your ‘how do I...........’, ‘what happens if.......’, ‘is there any way to.........’ and any other Estimating questions to this collaborative session. We’ll have a team of estimating experts as well as the rest of the session attendees to help figure out the answers and share best practices in working with the Sage Estimating software. This is a round table and audience participation session so come with your questions and be prepared to share your knowledge in this interactive session.

9-7 BIM 101
Session Level: Intermediate
Who Should Attend: Estimators, Estimating Managers
Version: Pervasive and SQL
Prerequisites: Attendees should understand the basic workflow of quantity takeoff, estimate creation, item and assembly input
Specific Learning Objectives: Attendees will come away from this session with an overall understanding of what BIM is, where it is headed and the impact it is having on Estimating and the construction industry. Questions and discussions are highly encouraged.

9-8 BIM 201 Integrated Solutions with Sage Estimating Lab – Innovaya, Navisworks, etc.
Session Level: Intermediate
Who Should Attend: Estimators, Estimating Database Managers
Version: Pervasive and SQL
Prerequisites: Attendees should understand the basic workflow of quantity takeoff, estimate creation, item and assembly input; a basic understanding of BIM is also helpful.
Specific Learning Objectives: After completing these classes, you will be able to utilize Innovaya’s 5D Estimating product to perform quantity takeoff, and be able to input the calculated quantities into Sage Estimating through the visual estimating interface. Attendees will also learn how to document their takeoff making use of Microsoft® Office and other integrated communication tools. Discussions on other BIM Estimating Integrations will also be encouraged.

9-11 Estimating to Job Cost: Sage 100 Contractor and Sage 300 CRE
Session Level: All
Who Should Attend: Persons tasked with the setup and/or use of the Estimating integration to Job Cost (both Sage 300 CRE or Sage 100 Contractor)
Version: Pervasive
Prerequisites: None
Specific Learning Objectives: The integration within Sage Estimating can automate the creation of Budgets and Change Orders in Sage 100 Contractor and Sage 300 CRE and the creation of Proposals in Sage 100 Contractor. In this session, we will go through the setup and workflow to accomplish the integration with the accounting and project management products. This session will be taught using the Pervasive version of Estimating.

Track 10: Sage Estimating (300 CRE) – Advanced Estimating

10-5 ODBC (Open Database Connectivity) for Estimating Lecture (1 of 2)
Session Level: Advanced
Who Should Attend: Estimating power users and database administrators
Version: Pervasive
Prerequisites: Familiarity with making basic database changes using the core application and Database Editor; working knowledge of Microsoft® Excel; basic familiarity with Microsoft® Access will be helpful.
Specific Learning Objectives: On occasion, users need to manipulate estimating database content that can be difficult or inefficient to access directly within the Estimating or Database Editor applications. This session will cover effective use of the Sage ODBC driver together with Microsoft® Access and Excel to safely perform large scale changes your database content. After completing this class, you will be able to:
• Setup an initial data connection
• Identify data tables corresponding to relevant database content
• Effectively make large scale changes to database content using MS Access and MS Excel in conjunction with one another
• Understand necessary precautions to take when working with any data via ODBC methods
• Begin working with estimate file content using the ODBC driver
10-6 ODBC (Open Database Connectivity) for Estimating Lab (2 of 2) – See 10-5

10-9 Models Estimating Lab (1 of 2)
Session Level: Advanced/Expert
Who Should Attend: Estimating power users and database administrators
Version: Taught in SQL, concepts the same in Pervasive
Prerequisites: Experience using Quick, Item and Assembly Takeoff; Basic familiarity with building database formulas and assemblies
Specific Learning Objectives: Attention advanced users! Take estimating to another level. This session is for those of you with complete databases who have mastered the use of assemblies. Models can be created to link assemblies to create a complete system or can be designed to estimate an entire project from base assumptions. You’ll use the TUG database or a Sage 300 CRE sample database to develop models. If your own laptop has the models module, you can build models with your database. After completing this class, you will be able to:
• Understand the basic setup, use of questions, different inputs and operation of models
• Visualize how Sage Estimating brings it all together for detailed budget creation from limited information
• Build models during the lab session from the ideas and concepts presented in the preceding Models session

10-10 Models Estimating Lab (2 of 2) – See 10-9

10-13 Crystal Reports for Estimating Lab (1 of 2)

Session Level: Advanced/Expert
Who Should Attend: Estimating power users and database administrators
Version: SQL
Prerequisites: Experience using spreadsheet reports; basic understanding of the Sage ODBC driver will be helpful
Specific Learning Objectives: After completing this class, you will be able to: Connect to estimating data and understanding the fundamental tables
• Extract the estimate project information, emulate the spreadsheet content and the totals page content
• Use sub-reports and shared variables
• Create reports that emulate WBS-sorted spreadsheet content, conditionally suppress records or sections based on specific criteria, and conditionally react to the existence or the absence of required fields
• Be able to develop a complete deliverable for any estimate you produce

10-14 Crystal Reports for Estimating Lab (2 of 2) – See 10-13

Track 11: Sage 300 CRE Beginning User – Financial Basics

11-1 Sage 300 CRE Concepts for Accountants and Project Managers

Session Level: Basic
Who Should Attend: All users new to Sage 300 CRE
Prerequisites: None
Specific Learning Objectives: This session will explain the structure of the Sage 300 CRE databases, in which data is put into the system through data entry screens and information is accessed through inquiries and reports. This session will review the wide array of modules available and describe the functions of each, including the Core Accounting modules, Revenue Apps for Contracts and Billing, Real Estate modules, Specialty Contractor modules, Service Management, Project Management, Estimating, Sage Desktop, Sage Construction Anywhere, Sage MyAssistant and Office Connector. The session will review accessing various reports, inquiries and data entry screens to help users get comfortable navigating through Sage 300 CRE modules.

11-2 Using Sage 300 CRE Desktop Lab

Session Level: Basic
Who Should Attend: All users new to Sage 300 CRE
Prerequisites: None
Specific Learning Objectives: This hands-on lab session will allow users who are new to the Sage system to practice navigating around Sage 300 CRE Desktop, Sage 300 CRE modules, accessing data entry screens, viewing inquiries and running reports. In this session, we will practice the step-by-step instructions to access the “My Tasks” shortcuts and Job Overview reporting provided with Sage 300 CRE Desktop. After completing this class, you will be able to setup your own desktop and utilize it as a step by step procedures guide.

11-3 Cash Management Lab

Session Level: Basic
Who Should Attend: All users new to Sage 300 CRE
Prerequisites: None
Specific Learning Objectives: This class will cover module setup through reconciliation, including:
• Use Setup Assistant to set up the first bank account
- Use Setup Bank Account to create a second bank account
- Importing cleared checks
- Reconciling a bank account
- Use of Edit Register to enter misc entries
- How to enter transfers between bank accounts using Bank Transfers
- How to record EFT and ACH transactions
- How to setup credit card accounts

11-4 Job Cost Job Setup Lab
Session Level: Basic
Who Should Attend: All Accounting Staff
Prerequisites: None
Specific Learning Objectives: Setting up Jobs in Job Cost

11-5 Job Cost Basics Lab (1 of 2)
Session Level: Basic
Who Should Attend: Users new to the Job Cost (JC) module - Accountants, accounting personnel, controllers
Prerequisites: None
Specific Learning Objectives: This hands-on lab session will cover job cost tasks, including: JC Settings
- Setup Cost Codes
- Setup Categories
- Enter Commitments
- Enter Direct Costs

11-6 Job Cost Basics Lab (2 of 2) – See 11-5

11-7 Accounts Receivable Basics Lab
Session Level: Basic
Who Should Attend: Users new to the Accounts Receivable (AR) module; Accounting personnel who are responsible for maintaining customers, entering invoices and cash receipts, analyzing accounts receivable aging, and maintaining sales tax rates; Accounting Managers; Controllers.
Prerequisites: None
Specific Learning Objectives: This hands-on lab session will give you the fundamentals of the accounts receivable module. After completing this class, you will understand how Accounts Receivable is set up and why. We will demonstrate how simple customization to the application setup can make data entry easier and more meaningful. We will review the setup of customers and sales tax rates and demonstrate transaction workflow.

11-8 Accounts Payable Basics Lab
Session Level: Basic
Version: 16.1
Who Should Attend: Users new to the Accounts Payable (AP) module; Accounting personnel who are responsible for maintaining vendors, entering invoices and preparing payments, and preparing Form 1099s; Accounting Managers; Controllers.
Prerequisites: None
Specific Learning Objectives: This hand-on lab session will give you the fundamentals of the Accounts Payable (AP) module. After completing this class, you will know how to set up vendors and check forms, enter invoices, select invoices to pay, print checks, and record manual checks. We will demonstrate how simple customization to the invoice entry grid can make data entry easier and more meaningful. You will understand the application interfaces, period-end methods, and common reports.

11-9 General Ledger Basics Lab
Session Level: Basic
Who Should Attend: Users new to the General Ledger (GL) module – Controllers, managers and accountants

Prerequisites: None

Specific Learning Objectives: This hands-on lab session will give users an understanding of the flow of data through the General Ledger module, learn how to set up accounts, how to record, edit and delete entries, print reports from the General Ledger, and to add, edit or delete budget data. Imports will not be covered in this class.

11-10 Running Reports & Inquiries + ID & RD Basics

Session Level: Basic
Version: 16.1

Who Should Attend: New users of the Sage 300 CRE software

Prerequisites: None

Specific Learning Objectives: This hands-on lab session will allow users who are new to the Sage system to practice accessing reports and inquiries. We will review the reports menu structure to find the report you want and discuss how to condition reports to display only the data you want. We will review the Report Manager and discuss how to edit the report menus. We will access standard inquiries and review how to drill down to more detail and how to display specific related information.

Track 12: Sage 300 CRE Beginning User – Project Management Basics

12-3 Sage 300 CRE Address Book & PJ Job Setup Lab (1 of 2)
Session Level: Basic

Who Should Attend: Users new to the Project Management (PJ) module - project managers, project coordinators, project accountants and project assistants or experienced Sage 300 CRE accounting users who need to understand Project Management workflow

Prerequisites: Attendees of this session should be familiar with construction project management techniques, and basic Sage 300 CRE structure and workflow

Specific Learning Objectives: This hands-on lab session will focus on the step-by-step tasks involved in setting up jobs in the PJ Module, Job Contact Lists, and Job Distribution Lists. We will discuss options such as setting up jobs in PJ with temporary job numbers for estimating purposes, then re-numbering the job with a JC job number when the job is won. We will discuss which information is shared between JC and PJ and which information is unique, including Custom Fields, Cost Codes, Categories, Misc. Worksheets and Commitments. The session will also focus on the step-by-step tasks involved in creating and/or editing Address Book contacts (Companies and Persons) that are used throughout the Sage 300 Accounting Modules. We will cover various features such as how to enter one name for sorting and another name to display on forms, entering street address versus remit address, entering categorizing information and linking to AP and/or AR.

12-4 Sage 300 CRE Address Book & PJ Job Setup Lab (2 of 2) - See 12-3

12-5 Managing Project Management Documents Lab (1 of 2) – Transmittals, RFI’s, & Submittals
Session Level: Basic

Who Should Attend: Users new to the Project Management (PJ) module - project managers, project coordinators, project accountants and project assistants or experienced Sage 300 CRE accounting users who need to understand Project Management workflow

Prerequisites: Attendees of this session should be familiar with construction project management techniques, basic Sage 300 CRE structure and workflow.

Specific Learning Objectives: This hands-on class will focus on the step-by-step tasks involved in entering & sending Transmittals and managing Requests for Information (RFIs), including: How to create & send a Transmittal.
  • Create and send an RFI.
  • Open & Log an RFI answer
• Sending Transmittal Log using My Assistant
• Tracking open RFI’s with My Assistant

12-6 Managing Project Management Documents Lab (2 of 2) - Drawing Log, Correspondence Log, & Custom Logs

Session Level: Basic

Who Should Attend: Users new to the Project Management (PJ) module - project managers, project coordinators, project accountants and project assistants or experienced Sage 300 CRE accounting users who need to understand Project Management workflow

Prerequisites: Attendees of this session should be familiar with construction project management techniques, basic Sage 300 CRE structure and workflow.

Specific Learning Objectives: This hands-on class will focus on the step-by-step tasks involved in tracking Drawings and Submittals, including:
- Entering Drawing updates and revisions.
- Create Submittal Log.
- Enter Submittal and forward to architect.
- Enter Submittal status and return to vendor.
- Enter Submittal Revision.
- Send Drawing & Submittal Logs using My Assistant
- Track outstanding/overdue Submittals with My Assistant

12-9 PJ Financials Basics & Change Management Lab (1 of 4)

Session Level: Basic

Who Should Attend: Users new to the Project Management (PJ) module - project managers, project coordinators, project accountants and project assistants or experienced Sage 300 CRE accounting users who need to understand Project Management workflow

Prerequisites: Attendees of this session should be familiar with construction project management techniques, basic Sage 300 CRE structure and workflow

Specific Learning Objectives: This 4-part hands-on lab session will cover all aspects of the PJ Change Management system for tracking Change Requests, Owner Change Orders and Commitment Change Orders. After completing this class, you will be able to create internal (non-billable) and billable change requests, generate vendor requests for quote, track vendor pricing, produce change request forms, send pending estimate changes to Job Cost, use logs (reports), and edit estimates and markups. You will be able to enter a job’s schedule of values (contract price) in Job Central or Contracts, create a change order, choose the associated change requests, approve the change order, update the job’s schedule of values, edit an approved change order, and use change order reports. You will be able to enter a commitment (purchase order or subcontract), issue commitment change orders, use the Change Request to pull in vendor pricing and create linkages for reporting, and control whether the change modifies existing line items in a commitment, or add new line items.

12-10 PJ Financials Basics & Change Management Lab (2 of 4) – See 12-9
12-11 PJ Financials Basics & Change Management Lab (3 of 4) – See 12-9
12-12 PJ Financials Basics & Change Management Lab (4 of 4) – See 12-9

12-13 PJ Subcontractor Compliance Lab

Session Level: Basic

Who Should Attend: CEOs, Controllers, Accounting Managers, AP and/or JC support staff who work with subcontractors on projects with documentation requirements such as lien waivers, certified payroll reports, and insurance certificates.

Prerequisites: None

Specific Learning Objectives: Attendees will gain a basic understanding of the functionality of the optional subcontractor compliance mini-application. We will review the setup and workflow of this feature and also identify the key interfaces with the Job Cost (JC) module.
Track 13: Sage 300 CRE Experienced User – Controllers

13-1 Audit Preparedness – Half lecture/Half Q&A discussion
Session Level: Basic
Who Should Attend: Controllers, Accountants, Owners
Prerequisites: None
Specific Learning Objectives: Discussions about audit needs and requirements and how to use the software to help prepare for an audit.
See 1-1

13-2 Data Structure for Controllers/ODBC
Session Level: Intermediate
Who Should Attend: CFO’s, controllers, accounting managers
Prerequisites: None
Specific Learning Objectives: This session will review several key metrics that are commonly measured and discuss how to track them through Sage 300 CRE.

13-3 Month-End, Quarter-End, and Year-End Procedures (1 of 2)
Session Level: Intermediate/Advanced
Who Should Attend: This workshop is intended for the accounting personnel in the company who manage the month end and year end closing processes
Prerequisites: Interest in building standardized closing procedures
Specific Learning Objectives: Learn about month-end through year-end closing procedures, and reconciliation reports and tools. We will cover best practices for closing procedures for period end, and review a checklist to assure that all of your company’s period end procedures and reporting are complete and useful. After completing this class, you will be able to plan and implement year-end procedures, create both an archive and a historical data folder, backup and restore data, and create a company plan for archiving data.
13-4 Month-End, Quarter-End, and Year-End Procedures (2 of 2) – See 13-3

13-5 Reconciliation Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Accounting personnel tasked with reconciling subledgers to the general ledger
Prerequisites: Attendees should be familiar with basic accounting concepts of reconciliation.
Specific Learning Objectives: After completing this 2-part hands-on lab session, you will be able to perform basic reconciliation tasks for Accounts Receivable, Accounts Payable, Cash Management, Job Cost, Payroll, and General Ledger. You will be able to identify common reasons for out of balance conditions and execute the necessary steps to solve the problem. Best practices for avoiding out of balance issues will also be discussed. Desktop Reconciliation Tool will be demonstrated.
13-6 Reconciliation Lab (2 of 2) – See 13-5

Track 14: Sage 300 CRE Experienced User – Accounting

14-1 Job Cost Advanced Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: CFOs, Controllers, Accounting Managers, Users familiar with the Job Cost (JC) module
Prerequisites: A working knowledge of the JC module and familiarity with job cost variance analysis, job cost forecasting, and managing subcontracts.
Specific Learning Objectives: This hands-on lab session will give you the fundamentals of the lesser used features in the JC module. After completing this class, you will know how to setup and use Extras, understand how Misc. Worksheets function and how to setup and use your own Misc. Worksheet entry screens, how to import certain types of transactions and how to use the Subcontractor Compliance features by setting defaults for each job and managing the Compliance Grid.

14-2 Job Cost Advanced Lab (2 of 2) – See 14-1

14-3 Accounts Payable Advanced Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Users familiar with the Accounts Payable (AP) module - Accountants, accounts payable managers, accounts payable personnel, controllers
Prerequisites: None
Specific Learning Objectives: This hands-on lab session will give you the fundamentals of the more advanced features in the accounts payable module. After completing this class, you will know how to setup and process sales and use tax, how to setup and process recurring invoices, how to manage credit cards, how to process EFT (electronic Fund Transfer) payments, and how to use the Subcontractor Compliance task (Subcontractor Compliance setup will not be covered).

14-4 Accounts Payable Advanced Lab (2 of 2) – See 14-3

14-7 GC Best Practices Panel
Session Level: Basic
Who Should Attend: All users
Prerequisites: None
Specific Learning Objectives: We will discuss issues facing General Contractors in the Construction and Real Estate industry. Discussion will also include the general upstream and downstream interactions between Subcontractors, General Contractors, Suppliers, and Architects/Engineers. Bring your companies Best Practices, ideas, solutions and issues for an open class discussion.

14-8 Subcontractor Best Practices Panel
Session Level: Basic
Who Should Attend: All users
Prerequisites: None
Specific Learning Objectives: We will discuss issues facing Subcontractors in the Construction and Real Estate industry. Discussion will also include the general upstream and downstream interactions between Subcontractors, General Contractors, Suppliers, and Architects/Engineers. Bring your companies Best Practices, ideas, solutions and issues for an open class discussion.

14-9 Subcontractor Compliance Lab – AP, JC & PJ
Session Level: Basic
Who Should Attend: CEOs, Controllers, Accounting Managers, AP and/or JC support staff who work with subcontractors on projects with documentation requirements such as lien waivers, certified payroll reports, and insurance certificates.
Prerequisites: None
Specific Learning Objectives: Attendees will gain a basic understanding of the functionality of the optional subcontractor compliance mini-application. We will review the setup and workflow of this feature and also identify the key interfaces with the Job Cost (JC) module.

14-10 Advanced General Ledger Lab
Session Level: Intermediate
Who Should Attend: CFOs, Controllers, Accounting Managers and Users familiar with the General Ledger (GL) module

Prerequisites: A working knowledge of the GL module functionality and workflow.

Specific Learning Objectives: This hands-on lab session will give you the fundamentals of the lesser used features in the GL module. After completing this class you will understand GL structure and grouping and how to best apply them for the various divisions, locations and/or business units in your company. This class will also cover how to import transactions into GL, how to create income statement budgets for financial reporting purposes, and how to setup and use automated entries.

14-12 Error Correction AP & CM
Session Level: Intermediate
Who Should Attend: Accounting personnel that work with AP or CM.
Prerequisites: Familiarity with AP or CM
Specific Learning Objectives: Learn how to correct common (and some not so common) errors in AP and CM.

14-13 Accounts Receivable Error Correction Lab (1 of 2) – including importing
Session Level: Intermediate
Who Should Attend: Users familiar with the Accounts Receivable (AR) module - Accounting personnel who are responsible for maintaining customers, analyzing accounts receivable aging, entering cash receipts, and entering invoices, Accounting Managers, Controllers
Prerequisites: None
Specific Learning Objectives: This hands-on lab session will give you the fundamentals of error correction in the accounts receivable module. We will review common errors than review the detailed steps necessary to make corrections so the reports will be accurate.

14-14 Accounts Receivable Error Correction Lab (2 of 2) – See 14-13

Track 15: Sage 300 CRE Experienced User – Operations/Project Accounting

15-1 Financial Management & Forecasting Concepts (1 of 2)
Session Level: Intermediate
Who Should Attend: Users of Sage 300 CRE Accounting and PJ Project Management software, including controllers, project managers, project coordinators, project accountants and project assistants that create estimates, track costs and prepare cost forecasts
Prerequisites: Attendees of this session should be familiar with Sage 300 CRE job costing, commitments and PJ Change Management workflow
Specific Learning Objectives: This class will focus on an overview of a detailed job cost management workflow, with an emphasis on roles at various points in the process, from estimate entry to tracking commitment to forecasting. Often different departments have different priorities and needs, so a key goal of this session is to help project managers, accountants, and controllers understand how they can each work together to enter data and share the information they each need.

15-2 Financial Management & Forecasting Concepts (2 of 2) – See 15-1

15-5 Advanced PJ Change Management Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Users familiar with the Project Management (PJ) Change Management system - project managers, project coordinators, project accountants and project assistants.
Prerequisites: Attendees of this session should be familiar with PJ Change Management workflow and data entry screens as well as Contracts and Billing workflow and data entry screens.
Specific Learning Objectives: This 2-part hands-on lab session will cover advanced aspects of the PJ Change Management system. We will review the details of various real-world scenarios such as managing Owner
Contingencies, Allowances, Reimbursables and Owner-Furnished Equipment on your Schedule of Values. We will also go through the detail of how to use your Change Request Log to track all internal issues such as estimate changes, or buyouts & busts, as well as other incidents that can come up on a job such as issuing original scope to a sub as a change order or issuing change order scope to a sub that does not yet have an original subcontract.

15-6 Advanced PJ Change Management Lab (2 of 2) – See 15-5

15-7 Project Life-Cycle (1 of 2)
Session Level: Intermediate
Who Should Attend: Experienced Sage 300 CRE Users
Prerequisites: None
Specific Learning Objectives: In the fast-paced world of construction technology it is easy to get overwhelmed by the solutions/methods available to collect, store, manage and interpret data during the project lifecycle. In this two-part session, we will look at one company’s list of “solutions” for managing a project through its entire lifecycle – from prospect to bid to construction to close-out to warranty. In a roundtable type format, we will look at what other attendees are doing and how not to end up with a mishmash of disjointed “solutions” that don’t work well together.

15-8 Project Life-Cycle (2 of 2) – See 15-7

Track 16: Sage 300 CRE Experienced User – Developer/Property Manager

16-9 Weird Stuff We Track in Property Management
Session Level: Intermediate
Who Should Attend: Property Managers, Asset Managers and Accountants
Prerequisites: Basic familiarity with Property Management
Specific Learning Objectives: Make use of Custom Field and Custom Description features as well taking advantage of little known tools such as GL Unit Fields to store information for easy retrieval.

16-10 Property Management: GL from A to Z
Session Level: Beginning and Intermediate
Who Should Attend: Accountants, Controllers and Property Managers
Prerequisites: Basic familiarity with General Ledger
Specific Learning Objectives: General Ledger has a host of unexplored control settings and options available. Learn how to adjust your settings to be serve your practices and procedures.

16-11 Financial Statement Lab – Express Yourself for Real Estate
Session Level: Intermediate and Advanced
Who Should Attend: Accountants and Controllers
Prerequisites: Ability to design an Income Statement and Balance Sheet in Financial Statement
Specific Learning Objectives: Design an assortment of expressions using Unit GL Accounts, Accumulators, Budget, Cash Flow and Monthly Fields. A comparative statement will be created that provides cost per square foot per month for multiple properties.

16-12 It’s All About Us: Budget, Pass Thru’s & Automation Tools
Session Level: TBD
Who Should Attend: TBD
Prerequisites: TBD
Specific Learning Objectives: TBD

16-13 Best Practices for Property Management Workflow
Session Level: Intermediate
**Who Should Attend:** Anyone who works in the Property Management module.

**Prerequisites:** None

**Specific Learning Objectives:** To learn ways to better utilize the daily, weekly, and monthly property management tasks within the PM module.

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**16-14 Real Estate Panel**

**Session Level:** Basic/Intermediate

**Who Should Attend:** Anyone involved in PM management

**Prerequisites:** Familiarity with at least basic PM functions

**Specific Learning Objectives:** A facilitated discussion with attendees, covering current topics and questions.

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**Track 17: Sage 300 CRE Experienced User – Specialty/Service Contractor**

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**17-1 Equipment**

**Session Level:** Basic

**Who Should Attend:** Users new to the Equipment (EQ) module - Accounting staff responsible for allocating equipment hours to jobs and recording equipment costs and maintenance information to each piece of equipment, Accounting Managers, Controllers

**Prerequisites:** None

**Specific Learning Objectives:** This session will cover the tasks, inquiries and reports of the EQ module.

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**17-4 Crystal for Service Management Lab (1 of 4)**

**Session Level:** Intermediate

**Who Should Attend:** Both Operations and Accounting personnel who use Service Management and have some Crystal Reports experience

**Prerequisites:** Working knowledge of Service Management and some Crystal Reports exposure

**Specific Learning Objectives:** After completing this class, you will be able to connect Crystal Reports to the Service Management data, and write a report using grouping and filtering, using transaction data. Example reports to be created: Service Management General Ledger transactions with accounting date ranges to be used in reconciliation, and a Work Order cost transaction report. *Lab 1 class is required to attend Labs 2, 3, and 4.

**17-5 Crystal for Service Management Lab (2 of 4) – See 17-4**

**17-6 Crystal for Service Management Lab (3 of 4) – See 17-4**

**17-7 Crystal for Service Management Lab (4 of 4) – See 17-4**

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**17-8 Service Management Panel: Best Practices**

**Session Level:** Basic/Intermediate

**Who Should Attend:** Dispatchers, Accountants, Controllers, CFO’s, Owners, and any others interested in the Service Management module and what it can do

**Prerequisites:** None

**Specific Learning Objectives:** Upon completion of this class, you will have an understanding of the Service Management module including tracking equipment and preventative maintenance schedules.

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**Track 18: Sage 300 CRE Experienced User – Payroll**

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**18-3 Forms Creation Lab – HR Forms & eVerify, doc designer MS word integration: See 12-3**

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**18-9 Certified Payroll**

**Session Level:** Intermediate
Who Should Attend: Accounting staff responsible for the entering of payroll time, setup of employees, and printing and verification of certified payroll reports.

Prerequisites: A good understanding of payroll processing workflow including payroll settings, setup of employee, pays, deductions, fringes and taxes, time entry and process as well as the setup of the job cost job. A basic understanding of formulas is also helpful.

Specific Learning Objectives: At completion of this class, you will be able to setup certified classes, the certified pay rate table, and the cash fringe pay ID. You will be able to verify that appropriate fringes are calculating as part of your hourly fringe. You will also be able to print the certified payroll report and statement of compliance.

18-10 ACA Issues
Session Level: Basic
Who Should Attend: Anyone responsible for generating ACA reporting
Prerequisites: None
Specific Learning Objectives: Discuss ACA issues, learn how to use the Payroll application and Aatrix to comply with the ACA reporting requirements.

18-11 Payroll Lab (1 of 2)
Session Level: Basic
Who Should Attend: Users new to the Payroll module
Prerequisites: None
Specific Learning Objectives: This hands-on lab session will cover employee set up and payroll tasks, including:
- Set-up employees
- Set-up pays
- Set-up deductions/fringes/taxes
- Enter time
- Process payroll
- Generate direct deposit and print checks
- Useful Inquiries and reports

18-12 Payroll Lab (2 of 2) – including importing to PR & Remote Time Capture – See 18-11

18-13 Payroll: Issues and Solutions – Panel Discussion with Q&A
Session Level: Basic
Who Should Attend: Anyone who uses the payroll application
Prerequisites: None
Specific Learning Objectives: Bring your payroll questions and issues and be ready to share your solutions with others as well as participate in roundtable discussions to get your questions answered.

18-14 Payroll: Issues and Solutions – Panel Discussion with Q&A – See 18-13

Track 19: Sage 300 CRE Experienced User – Forecasting & WIP Reporting


19-6 WIP Reporting Overview: See 1-6

19-9 WIP, Forecasting & Commitment Management with Office Connector/Crystal/ODBC Lab (1 of 2): See 23-9
19-10 WIP, Forecasting & Commitment Management with Office Connector/Crystal/ODBC Lab (2 of 2): See 23-10
Track 20: Sage 300 CRE Experienced Users – In-Depth Panel Discussions

20-3 Paperless Office & AP Process: Issues and Solutions (1 of 2)
Session Level: Intermediate
Who Should Attend: Anyone involved in managing a paperless office workflow and/or Accounts Payable electronic approval process
Prerequisites: Note that this vendor roundtable will include sales presentations from relevant vendors.
Specific Learning Objectives: This is a two-session class that will deal with all aspects of Paperless Office and the Accounts Payable Process. This session will include presentations from 3rd party vendors that sell products relating to scanning and/or document management and/or to AP automation. The in-depth panel discussion will include an overview of paperless office and AP processing flows and issues, vendor presentations, and a roundtable format discussion of best practices and Q&A.

Track 21: Sage 300 CRE Fundamentals: Contracts & Billing

21-1 Contract-Based Billing: CN, BL Lab (1 of 2)
Session Level: Basic
Who Should Attend: Users new to the Contracts (CN) and Billing (BL)modules - Accountants, accounts receivable managers, and billing assistants (office or project managers) who want to bill progress (AIA), lump sum or unit price contracts
Prerequisites: Attendees should have an understanding of how to bill progress, lump sum or unit price contracts using Microsoft® Excel or a similar program
Specific Learning Objectives: You will learn the settings that influence the billing process. You will have the knowledge to setup, bill, print, and post a new contract and invoice. This will include how to enter change requests/change orders either using job cost or project management.
21-2 Contract-Based Billing: CN, BL Lab (2 of 2) – See 21-1

21-5 Cost-Based Billing: JC, CN, BL & AR Lab (1 of 4)
Session Level: Intermediate
Who Should Attend: Accounting staff responsible for the billing of cost based invoices
Prerequisites: Attendees should be familiar with structure of Job Costs categories and cost codes
Specific Learning Objectives: After completing this class, you will be able to complete the general workflow for reconciling and printing invoices. You will be able be confident in the setup of cost based contracts. You will also be able to verify that all applications interfaces are activated for billing. A high-level review of set up application interfaces, cost based contracts, billing rate, markup, and add-on tables will help you reinforce your knowledge.
21-6 Cost-Based Billing: JC, CN, BL & AR Lab (2 of 4) – See 21-5
21-7 Cost-Based Billing: JC, CN, BL & AR Lab (3 of 4) – See 21-5
21-8 Cost-Based Billing: JC, CN, BL & AR Lab (4 of 4) – See 21-5

Track 22: Sage 300 CRE Fundamentals – MyAssistant

22-3 Intro to MyAssistant Lab – pre-requisite for other MyAssistant classes
Session Level: Beginner
Who Should Attend:
Prerequisites: None (this is a prerequisite for other MyAssistant sessions)
**Specific Learning Objectives**: This hands-on lab session will familiarize you with basic concepts of MyAssistant, including how to activate and use prebuilt tasks included within your system, and prepare you for other sessions within the conference. You will have the opportunity to see the unique ways in which MyAssistant makes the accounting process more efficient and productive by automating redundant processes!

**22-4 MyAssistant for PR / GL / AR Lab**

**Session Level**: Intermediate  
**Who Should Attend**: Controllers or Payroll personnel who wish to use MyAssistant for notifications  
**Prerequisites**: Attendees of this session should be familiar with Sage 300 CRE GL, PR and AR structure and workflow  
**Specific Learning Objectives**: This class will review the setup and use of the MyAssistant module to notify accounting team members when documents are due or when other follow-up is required as well as to send notifications directly to employees or to customers.

**22-7 Using MyAssistant for Accounting (JC/AP) & Project Management (PJ) Lab (1 of 2)**

**Session Level**: Intermediate  
**Who Should Attend**: Users of Sage 300 CRE who wish to use MyAssistant for Notifications  
**Prerequisites**: Attendees of this session should be familiar with construction project management techniques, and general contractor usage of Sage 300 CRE modules such as JC for subcontracts and purchase orders and PJ Project Management  
**Specific Learning Objectives**: This class will review the setup and use of the MyAssistant module to notify operations team members when documents are due, overdue, or when other follow-up is required.  
**22-8 Using MyAssistant for Accounting (JC/AP) & Project Management (PJ) Lab (2 of 2) – See 22-7**

**22-13 MyAssistant for Tracking Contracts, Billing & AR Lab**

**Session Level**: Intermediate  
**Who Should Attend**: Users of Sage 300 CRE who wish to use MyAssistant for Notifications  
**Prerequisites**: Attendees of this session should be familiar with contracts and billing  
**Specific Learning Objectives**: This class will review the setup and use of the MyAssistant module to notify accounting and operations team members when documents are due or when other follow-up is required.

**22-14 MyAssistant Communicator Lab**

**Session Level**: Basic  
**Who Should Attend**: Anyone  
**Prerequisites**: None  
**Specific Learning Objectives**: Learn how to:  
- Identify potential problems earlier to proactively deal with business or project issues  
- Quickly take advantage of new opportunities  
- Stay organized  
- Keep properties and projects running smoothly by tracking, assigning, and following up on key activities from within Microsoft® Outlook  
- Streamline workflow processes using one centralized location

**Track 23: Sage 300 CRE Fundamentals – Office Connector**

**23-1 Using Office Connector Starter Reports & Intro to OC Query Lab**

**Session Level**: Basic  
**Who Should Attend**: All Users who wish to use Office Connector Starter Reports and/or Office Connector Query
**Prerequisites:** Attendees of this session should be familiar with basic Sage 300 CRE structure and workflow

**Specific Learning Objectives:** This hands-on lab session will get you started with being familiar on Office Connector, including how to access and use the free reports included with your system to see the ease of transferring Sage 300 CRE information into a user friendly excel format. You will also be able to run multiple types of Queries via Office Connector.

**23-3 Office Connector Write & Import Lecture**
*Session Level:* Intermediate
*Who Should Attend:* All Users who are familiar with Office Connector basics and wish to use Office Connector Write and/or Office Connector Import

**Prerequisites:** Attendees of this session should be familiar with basic Sage 300 CRE structure and workflow

**Specific Learning Objectives:** This session will be more in depth with the workings of Office Connector, including the features and options available in the different versions (Query, Write and Import) to give you more confidence in creating specific reports and running custom queries.

**23-5 Commitment Management with Office Connector**
*Session Level:* Intermediate
*Who Should Attend:* All Users who are knowledgeable about Sage300 CRE Commitment workflow and data structure and familiar with Office Connector basics

**Prerequisites:** Attendees of this session should be familiar with JC Commitments and Subcontractor Compliance

**Specific Learning Objectives:** This session will review the issues involved in managing commitments, from dates to custom fields to Subcontractor Compliance and review how to build tools using Office Connector to help manage those processes.

**23-9 WIP & Forecasting with Office Connector Lab (1 of 2)**
*Session Level:* Intermediate
*Who Should Attend:* Users of Sage 300 CRE Accounting software that use Work In Progress (WIP) Reports to compare current results to forecasts. Also, users who want to improve Commitment Management tracking and reporting

**Prerequisites:** Attendees of this session should be familiar with using Office Connector, WIP reporting and Commitment Management

**Specific Learning Objectives:** This hands-on class will walk through modifying the Office Connector WIP & Forecasting worksheets included with the program and go through the steps needed to build Commitment Management reporting tools using Office Connector.

**23-10 WIP & Forecasting with Office Connector Lab (2 of 2) – See 23-9**

**23-11 Office Connector GL Entries / Budgets Import Lab**
*Session Level:* Intermediate
*Who Should Attend:* All Users who are knowledgeable about Sage 300 CRE GL workflow and data structure and familiar with Office Connector basics

**Prerequisites:** Attendees of this session should be familiar with GL budgets

**Specific Learning Objectives:** This session will review the issues involved in managing GL Entries and Budgets and review how to build tools using Office Connector to help manage those processes.

**23-13 Office Connector for AP Invoices / Credit Card Expenses**
*Session Level:* Intermediate
*Who Should Attend:* All Users who are knowledgeable about Sage 300 CRE AP workflow and data structure and familiar with Office Connector basics

**Prerequisites:** Attendees of this session should be familiar with AP invoices and credit cards

Updated 5/4/2017
**Specific Learning Objectives**: This session will review the issues involved in managing AP invoices and AP credit cards and review how to build tools using Office Connector to help manage those processes.

**23-14 Office Connector Financial Functions Lab**

**Session Level**: Intermediate  
**Who Should Attend**: Controllers, CFO’s, Accounting Managers, and General Ledger Accountants  
**Prerequisites**: Basic understand of the general ledger fields available for reporting financial data.  
**Specific Learning Objectives**: To learn how Office Connector-Financials can be used to create financial statements and financial analysis data.

**Track 24: Ask the Experts (Sage 300 CRE & Sage 100 Contractor) – One-on-One Booths**

**24-1 Ask the Experts: One-on-One Booth: Sage 300 CRE**

**Session Level**: Intermediate  
**Who Should Attend**: Anyone with specific Sage 300 CRE questions.  
**Prerequisites**: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.  
**Specific Learning Objections**: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

**24-2 Ask the Experts: One-on-One Booth: Sage 300 CRE**

**Session Level**: Intermediate  
**Who Should Attend**: Anyone with specific Sage 300 CRE questions.  
**Prerequisites**: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.  
**Specific Learning Objections**: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

**24-3 Ask the Experts: One-on-One Booth: Sage 300 CRE**

**Session Level**: Intermediate  
**Who Should Attend**: Anyone with specific Sage 300 CRE questions.  
**Prerequisites**: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.  
**Specific Learning Objections**: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

**24-4 Ask the Experts: One-on-One Booth: Sage 300 CRE**

**Session Level**: Intermediate  
**Who Should Attend**: Anyone with specific Sage 300 CRE questions.  
**Prerequisites**: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.  
**Specific Learning Objections**: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines.
Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

24-5 Ask the Experts: One-on-One Booth: Sage 300 CRE
Session Level: Intermediate
Who Should Attend: Anyone with specific Sage 300 CRE questions.
Prerequisites: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.
Specific Learning Objections: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

24-6 Ask the Experts: One-on-One Booth: Sage 300 CRE
Session Level: Intermediate
Who Should Attend: Anyone with specific Sage 300 CRE questions.
Prerequisites: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.
Specific Learning Objections: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

24-7 Ask the Experts: One-on-One Booth: Sage 300 CRE & Sage 100 Contractor
Session Level: Intermediate
Who Should Attend: Anyone with specific Sage 300 CRE or Sage 100 Contractor questions.
Prerequisites: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.
Specific Learning Objections: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

24-8 Ask the Experts: One-on-One Booth: Sage 300 CRE & Sage 100 Contractor
Session Level: Intermediate
Who Should Attend: Anyone with specific Sage 300 CRE or Sage 100 Contractor questions.
Prerequisites: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.
Specific Learning Objections: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

24-9 Ask the Experts: One-on-One Booth: Sage 300 CRE & Sage 100 Contractor
Session Level: Intermediate
Who Should Attend: Anyone with specific Sage 300 CRE or Sage 100 Contractor questions.
Prerequisites: Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.
Specific Learning Objections: The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

29

Updated 5/4/2017
**Ask the Experts: One-on-One Booth: Sage 300 CRE & Sage 100 Contractor**

**Session Level:** Intermediate

**Who Should Attend:** Anyone with specific Sage 300 CRE or Sage 100 Contractor questions.

**Prerequisites:** Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.

**Specific Learning Objections:** The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

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**Ask the Experts: One-on-One Booth: Sage 300 CRE**

**Session Level:** Intermediate

**Who Should Attend:** Anyone with specific Sage 300 CRE questions.

**Prerequisites:** Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.

**Specific Learning Objections:** The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

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**Ask the Experts: One-on-One Booth: Sage 300 CRE & Sage 100 Contractor**

**Session Level:** Intermediate

**Who Should Attend:** Anyone with specific Sage 300 CRE or Sage 100 Contractor questions.

**Prerequisites:** Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.

**Specific Learning Objections:** The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.

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**Ask the Experts: One-on-One Booth: Sage 300 CRE & Sage 100 Contractor**

**Session Level:** Intermediate

**Who Should Attend:** Anyone with specific Sage 300 CRE or Sage 100 Contractor questions.

**Prerequisites:** Users must come prepared with questions; the session will be an interactive Q&A, not a prepared presentation.

**Specific Learning Objections:** The “Ask the Experts: One-on-one booth” is an opportunity for users to ask specific questions of knowledgeable users or consultants and to experiment with scenarios on the provided lab machines. Note that this is not intended to be a “how to” presentation; it is a Q&A session and attendees are expected to come prepared with questions.
Track 25: Sage 300 CRE Reporting, SQL & ODBC/MS Applications – TS Reporting (ID, RD & FS)

25-1 Basic Report Designer Lab (1 of 4)
Session Level: Basic to Intermediate
Who Should Attend: Users who want to learn how to write reports or modify existing reports using Sage 300 CRE Report Designer module (not Crystal Reports).
Prerequisites: None - familiarity with running reports is helpful but not necessary.
Specific Learning Objectives: After completing this class, you will be able to create and modify basic reports using Sage 300 CRE Report Designer module (not Crystal Reports). The class is designed to familiarize users with the report designer window. Users will learn how to select, sort, organize, total, and present data from the Sage 300 CRE database in a usable report format. Users will be introduced to formulas and functions to help present data.

25-2 Basic Report Designer Lab (2 of 4) – See 25-1
25-3 Basic Report Designer Lab (3 of 4) – See 25-1
25-4 Basic Report Designer Lab (4 of 4) – See 25-1

25-5 Intermediate Report Designer Lab (1 of 4)
Session Level: Intermediate
Who Should Attend: Both operations and accounting personnel who feel they have reached the limit with Basic Report Designer skills and are ready to further their knowledge with intermediate features and techniques
Prerequisites: Completion of Basic Report Designer training, working knowledge of basic Report Designs, and basic understanding of Sage 300 CRE table structure
Specific Learning Objectives: Wish you could find a few more hours in your day? Spend one day in this workshop learning how to regain a few of those hours by modifying existing Sage 300 CRE reports, working with formulas, and utilizing custom fields. Are you still completing your WIP report in Microsoft® Excel? We’ll modify the WIP as of a specific date report, including prior year profit per job. Trying to deal with the new ACA compliance and wish your health insurance information was in the system? We will setup new custom fields and show you how to store the employee and employer insurance information. Then we will use those fields to calculate the employees deduct and employer fringe! Last, need some help with Lookups? We will setup a 401(k) match based on our 401k deduct, grab the project manager from the PJ contact list, and more!

25-6 Intermediate Report Designer Lab (2 of 4) – See 25-5
25-7 Intermediate Report Designer Lab (3 of 4) – See 25-5

25-9 Basic Financial Statements Lab (1 of 2)
Session Level: Basic
Who Should Attend: Users new to the Financial Statement Designer (FS) module - Controllers, Accounting Managers and Accountants preparing financial statements
Prerequisites: Attendees should understand the accounting principles used in creation of an income statement and balance sheet
Specific Learning Objectives: This hands-on lab session will teach you the “hows” and “whys” of Financial Statement Designer, including the GL fields available to FS, basic formatting and arithmetic tools, and methods of design. After completing this class, you will be able to prepare a basic income statement and balance sheet in FS.

25-10 Basic Financial Statements Lab (2 of 2) – See 25-9

25-11 Intermediate Financial Statements Lab (1 of 2)
Session Level: Intermediate
**Who Should Attend**: Controllers, Accounting Managers and Accounting staff responsible for preparations of financial statements and other management information

**Prerequisites**: Attendees should be able to create a basic income statement in Financial Statement Designer without assistance.

**Specific Learning Objectives**: Have you ever wanted to annotate a Variance Report in FS? Do you need to create a comparative statement for your profit centers? Or pull data for just one Partner’s interest in the Company? Sage 300 CRE Financial Statement Designer can do all that. After completing this class, you will be able to prepare Partner Statements and columnar Comparative Income Statements using Prefix Groups, and Budget Variance Reports using forecast fields, accumulators and expressions featuring GL Unit accounts.

25-12 Intermediate Financial Statements Lab (2 of 2) – See 25-11

**25-13 Inquiry Designer Lab (1 of 2)**

**Session Level**: Basic/Intermediate

**Who Should Attend**: Accountants, Controllers, Accounting Personnel

**Prerequisites**: None

**Specific Learning Objectives**: This session will start with an overview of what an “Inquiry” is. It will cover the basics of functionality and record relationships. We will tweak a couple of existing “canned” inquiries and then create a basic inquiry of our own. The session will continue with the creation of an inquiry with multiple column-specific jumps and explore different uses of formulas and conditions in inquiries. We’ll discuss what you might think is an out of the ordinary use for an inquiry.

25-14 Inquiry Designer Lab (2 of 2) – See 25-13

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**Track 26: Sage 300 CRE Reporting, SQL & ODBC/MS Applications – Crystal Reports**

**26-1 Basic Crystal Reports Lab (1 of 4)**

**Session Level**: Basic

**Who Should Attend**: Both operations and accounting personnel who are ready to make the jump to Crystal Reports

**Prerequisites**: Basic understanding of Sage 300 CRE

**Specific Learning Objectives**: You’re ready to make the jump to designing Crystal reports with the Sage 300 CRE database. Spend the day learning how to write reports for the core Accounting and Project Management applications. We’ll set up ODBC, and then create new reports. We’ll cover the fundamentals of formatting and will insert text and graphics for that professional look. We’ll condition, sort, and insert report totals. You’ll gain an understanding of preview report formulas. You’ll learn about linking tables and will see why linking is required and what it does. You’ll have plenty of hands-on activities. No prior experience with Crystal Reports is needed. However, we highly recommend that you be familiar with the Sage 300 CRE database and have Crystal installed and ready to use once you return to your office.

26-2 Basic Crystal Reports Lab (2 of 4) – See 26-1

26-3 Basic Crystal Reports Lab (3 of 4) – See 26-1

26-4 Basic Crystal Reports Lab (4 of 4) – See 26-1

**26-5 SQL-izing Crystal Reports Lab (1 of 4)**

**Session Level**: Advanced

**Who Should Attend**: Both operations and accounting personnel who have moderate to advanced Crystal Reports experience and want to take on more challenging tasks

**Prerequisites**: Working knowledge of Crystal Reports application and Sage 300 CRE data structure

**Specific Learning Objectives**: This session will show you how to create and use your own SQL commands in Crystal to increase reporting efficiency. Ever built a Crystal Report that runs too slow, or perhaps built a report 90% just to
find you can’t get it that last 10%? Have you ever thought there has to be a better way than using a half-dozen subreports? If so this class is for you. In this class, you’ll learn how to build reports that don’t need subreports, that run faster and that accomplish things you just thought were impossible with Crystal Reports. We will learn basic SQL functions and how to build SQL Queries that can be run inside Crystal to make your reports more efficient. If you own Anterra Data Center, this class is a must as you can take full advantage of all the speed and power SQL offers right from inside Crystal Reports. Even if you don’t own Anterra Data Center you will learn valuable secrets that will take your Crystal Report writing skills to the next level.

26-6 SQL-izing Crystal Reports Lab (2 of 4) – See 26-5
26-7 SQL-izing Crystal Reports Lab (3 of 4) – See 26-5
26-8 SQL-izing Crystal Reports Lab (4 of 4) – See 26-5

26-9 Crystal Reports Lab – Linking (1 of 2)
Session Level: Basic
Version: Crystal 2013
Who Should Attend: Anyone who has attended Crystal classes before and left wanting to know more. Linking is primary in creating efficient and effective reports. In this hands-on class, you will learn proper techniques and the Do's and Don'ts. You will leave with a far better understanding linking with Crystal Reports.
Prerequisites: Beginning Crystal
Specific Learning Objectives: Proper Linking, Left Table designation and the difference between inner and outer joins

26-10 Crystal Reports Lab – Linking (2 of 2) – See 26-9

26-11 Advanced Crystal Reports Lab (1 of 4)
Session Level: Advanced
Who Should Attend: Both operations and accounting personnel who have some Crystal Reports experience and want to take on more challenging tasks
Prerequisites: Working knowledge of Crystal Reports application and Sage 300 CRE data structure
Specific Learning Objectives: In this session, we will cover grouping, filtering, subreports, formulas, and conditional formatting. We will run some sample reports including Job Cost as of Date – based on JCT data table, select appropriate transactions by date range, group by Cost Code, add subreport to display Group Cost Code Headers (‘divisions’), add formulas to display “over/under budget,” add conditional formatting to display negative numbers as red

26-12 Adv Crystal Reports Lab – Linking (2 of 4) – See 26-11
26-13 Adv Crystal Reports Lab – Linking (3 of 4) – See 26-11
26-14 Adv Crystal Reports Lab – Linking (4 of 4) – See 26-11

Track 27: Sage 300 CRE Reporting, SQL & ODBC/MS Applications – Crystal Reports

27-9 WIP & Forecasting with Crystal Reports Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Users of Sage 300 CRE Accounting software that create Work In Progress (WIP) Reports to compare current results to forecasts.
Prerequisites: Attendees of this session should be familiar with using Crystal Reports and familiar with WIP reporting
Specific Learning Objectives: This hands-on class will walk through a WIP reporting workflow and go through the steps needed to build reporting tools using Crystal Reports to support your WIP process.

27-10 WIP & Forecasting with Crystal Reports Lab (2 of 2) – See 27-9
27-12 Modifying Canned Crystal Reports Lab – Accounting/PJ

Session Level: Intermediate
Who Should Attend: IT Professionals, Accounting Staff and/or Project Management Staff who are responsible for updating and maintaining Crystal Reports Templates used by Sage.
Prerequisites: Completion of Basic Crystal Reports class. Familiarity with Sage Accounting and Project Management modules and workflow.
Specific Learning Objectives:
• Create and manage customized reports and forms
• Use PJ Settings to select your custom form
• Use Report Manager to select your custom report
• Add your company logo to Crystal Reports
• Add, delete, move and resize fields on a report
• Change the formatting of a report
• Add page numbering options, like Page N of M
• Add groups for greater sorting, summarizing and subtotaling capabilities
• How to write a job number formula so you can either enter with hyphens or without hyphens
• Tips & Tricks for Crystal

27-13 Applied Crystal Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: IT Professionals, Accounting Staff and/or Project Management Staff who would like to be able to modify Crystal Reports Templates used by Sage and create custom Lien Waiver forms and PJ forms in Crystal Reports.
Prerequisites: Completion of Basic Crystal Reports class or working knowledge of Crystal Reports application. Familiarity with Sage 300 CRE data structure, Subcontractor Compliance Management workflow, and PJ.
Specific Learning Objectives: In this session, learn about the system settings and records related to lien waiver forms, the differences between (T) and non-(T) versions of the Sage Crystal Reports forms. You will also learn how to modify a Sage Crystal Reports template and save as a custom version, as well as how to use the features of Crystal Reports to create a new custom lien waiver form that prints one form per job for each check, as well as new PJ forms for subcontracts.
27-14 Applied Crystal Lab (2 of 2) – See 27-13

Track 28: Sage 300 CRE Reporting, SQL and ODBC/MS Applications – ODBC & Microsoft Access

28-1 Basic ODBC with Microsoft Office Lab (1 of 4)
Session Level: Basic
Who Should Attend: Accounting personnel looking for additional reporting capabilities outside of Sage 300 CRE Report Designer or Crystal Reports; specifically, anyone who wants to report on Sage 300 CRE data in Microsoft® Excel or load data into Sage 300 CRE using Microsoft® Access.
Prerequisites: Attendees should be familiar with Sage 300 CRE data structure and have a working knowledge of Microsoft® Office. Exposure to Microsoft® Access a plus but not necessary. This class is designed for beginners, to refresh rusty users and to prepare the user for the Intermediate sessions.
Specific Learning Objectives: After completing this class, you will be able to create and configure ODBC data sources and learn how to link data into Microsoft® Office applications for powerful reporting and graphing purposes. You’ll also use Microsoft® Access as a tool to write select data back to Sage 300 CRE.
28-2 Basic ODBC with Microsoft Office Lab (2 of 4) – See 28-1
28-3 Basic ODBC with Microsoft Office Lab (3 of 4) – See 28-1
28-4 Basic ODBC with Microsoft Office Lab (4 of 4) – See 28-1

28-5 Intermediate ODBC with Excel & Access Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Accounting personnel looking for additional reporting capabilities outside of Sage 300 CRE Report Designer or Crystal Reports; specifically, anyone who wants to report on Sage 300 CRE data in Microsoft® Excel and Microsoft® Access.
Prerequisites: Attendees should have prior experience setting up and using ODBC data sources, have a basic knowledge of how data is stored in Sage 300 CRE and be comfortable working independently in Microsoft® Excel and Microsoft® Access.
Specific Learning Objectives: After completing this class, you will be able to use ODBC to group, summarize and manipulate Sage 300 CRE data in Microsoft® Excel and Access for financial and operational purposes.

28-6 Intermediate ODBC with Excel & Access Lab (2 of 4) – See 28-5
28-7 Intermediate ODBC with Excel & Access Lab (3 of 4) – See 28-5

28-9 Advanced ODBC Mayhem Lab (1 of 4)
Session Level: Advanced
Who Should Attend: Advanced users and report designers
Prerequisites: Attendees should have a working knowledge of ODBC and Microsoft Excel and the ability to work with basic programming techniques. This class will include basic VBA and SQL examples.
Specific Learning Objectives: Learn advanced ODBC reporting techniques in Excel and Office Connector including reporting from multiple data folders, connection strings, files joins, SQL statements and VBA macros. Take your reporting to the next level with two of TUG’s best looking instructors.

28-10 Advanced ODBC Mayhem Lab (2 of 4) – See 28-9
28-11 Advanced ODBC Mayhem Lab (3 of 4) – See 28-9
28-12 Advanced ODBC Mayhem Lab (4 of 4) – See 28-9

28-13 WIP & Forecasting with ODBC Lab (1 of 2)
Session Level: Intermediate
Who Should Attend: Accounting personnel using Sage 300 CRE to create Work in Progress (WIP) Reports to compare current results to forecasts and reconcile job cost totals to general ledger.
Prerequisites: Attendees of this session should be familiar with using ODBC and familiar with WIP reporting
Specific Learning Objectives: This hands-on class will walk through a WIP reporting workflow and go through the steps needed to build reporting tools using ODBC to support your WIP process.

28-14 WIP & Forecasting with ODBC Lab (2 of 2) – See 28-13

Track 29: Sage & Third Party Applications – Presented by Sage in Other Tracks

29-1 Sage Paperless Construction
Specific Learning Objectives: Learn more about automated document management within your Sage 300 Construction & Real Estate or Sage 100 Contractor accounting solution. Route and approve documents electronically, such as invoices, PO’s, and other important financial documentation associated with operating your paper based workflow for more timely AP or AR needs.

29-2 Office Connector and MyAssistant for Sage 300 CRE
Specific Learning Objectives: Learn about basic concepts of MyAssistant, including how to activate and use prebuilt tasks included within your system, along with how we can get you started with being familiar on Office Connector, including how to access and use the free reports included with your system to see the ease of
transferring Sage 300 CRE information into a user friendly excel format. You will also be able to run multiple types of Queries via Office Connector.

29-3 SSO (Sage Service Operations)
**Specific Learning Objectives:** One of the most exciting and evolving areas of the Construction Accounting function, learn how Sage Service Operations can transition your entire service management needs to mobile and cloud technology. This session will focus on how this transformative solution can help you track service calls, deploy personnel manage time and so much more through a mobile device or from your office using Sage Service Operations. You won’t want to miss this.

29-6 BIM / Navisworks / eTakeoff
**Specific Learning Objectives:** You will truly be impressed with how this area of BIM is transforming the entire pre-construction to property management process with Sage’s partnerships with Autodesk and eTakeoff. This session will show you how you can further leverage Sage Estimating to get even more out of your Estimating solution and escalate your business to a true BIM provider.

29-7 Sage Construction Project Center (Sage 300 CRE)
**Specific Learning Objectives:** With a new version of our cloud based project management solution being released, you will learn how to extend the project management functionality of your accounting solution into your field and your field based colleagues. This technology will focus on the solutions new capabilities, will showcase how to more fully integrate your back office to field and job sites, and track, manage and report on financial information regardless of where you happen to be.

29-9 eTakeoff
**Specific Learning Objectives:** Digital takeoff solutions are changing the way that architecture and material information impacts bids, estimates and job costs. By learning more about eTakeoff, you will learn about how this seamless solution integrates with Sage Estimating and provides that real time ongoing transition between pre-construction, construction, change orders, and through the building process.

29-10 Sage 100 Contractor Roadmap
**Specific Learning Objectives:** Learn about the newest version of Sage 100 Contractor, version 20.1 and all the new functionality that will provide you more reasons to upgrade to the latest version of this powerful accounting software.

29-11 Sage 300 CRE Roadmap
**Specific Learning Objectives:** Not only will you hear about the latest technological advancements in this staple construction accounting solution, you will learn about powerful new capabilities that will be added to this critical foundational software including how to manage projects, service and reporting from mobile devices and how real time data exchange will be just around the corner.

29-13 Sage Estimating Roadmap
**Specific Learning Objectives:** Learn about not only what is new in Sage Estimating but more importantly, how what Sage has been developing in its current version of the software is framing what is coming in soon-to-be-released versions of this truly differentiated software solution. This session will focus on the vision of where Sage Estimating is going and when to expect some of its new technological advancements.

29-14 Sage Construction Project Center Lab (Sage 300 CRE)
**Specific Learning Objectives:** With a new version of our cloud-based project management solution being released, you will learn how to extend the project management functionality of your accounting solution into the field and your field-based colleagues. This technology will focus on the solution’s new capabilities, will showcase how to more fully integrate your back office to field and job sites, and track, manage and report on financial information regardless of where you happen to be.
Track 30: Sage & Third Party Applications – Sage & Vendor Presentations

30-8 Distributed Project Cost Forecasting - Presented by Event 1 Software
Session Level: All Levels
Who Should Attend: Sage 300 CRE and Sage 100 Contractor, Project Managers, Operations, Controllers, Finance, and Owners
Prerequisites: A basic understanding of Excel and an understanding of Project Cost Forecasting
Specific Learning Objectives: Trying to prepare accurate Project Status reports, Work in Progress reporting and project cash flow without timely and accurate field reports is likely to lead to inaccuracies which, at minimum, put your company at a strategic and competitive disadvantage and could ultimately impact your bonding. In this session, we will showcase a highly effective way to capture cost to complete, cost at completion, units in place and more from the field so that this information can back up your Work in Progress reporting and potentially revolutionize your cash flow reporting.
- Learn to create formatted Excel-based cost forecast reports tied directly to project finance information
- Learn best practices of your peers and competitors
- Sage 300 CRE – Learn how to automatically send this information into your Job Cost for Project Status, Work in Progress and Cash Flow reporting

30-12 Closing the Compliance Gap with ADP SmartCompliance® & Your In-House Payroll – Presented by ADP, LLC
Session Level: All
Who Should Attend: HR and Finance leaders and practitioners
Prerequisites: None
Specific Learning Objectives: The disparity between your payroll and related systems and the myriad laws related to managing human capital may leave a gap in your ability to comply effectively. Learn how to fully enable your current in-house systems with an integrated compliance-as-a-service solution, ADP SmartCompliance®

30-14 What’s New in Sage Estimating Version 17-11
Specific Learning Objectives: Come see how new technology development and product innovations have been applied to Sage Estimating and its new version, and learn how our Estimating solution can now truly revolutionize your entire pre-construction processes. In this session, you will learn about how some transformative product development efforts have really turned Sage Estimating into a critical solution in pre-construction.

Track 31: Sage & Third Party Applications – Vendor Sponsored Sessions

31-1 The Future of Payment Automation in the Construction Industry – Presented by Jim Campbell & Casey Timmerman of AvidXchange
Session Level: Beginner to advanced
Who Should Attend: CFO’s, Controllers, AP Managers
Prerequisites: None
Specific Learning Objectives: Join us for this interactive session with Jim Campbell, VP of Construction Sales, and Casey Timmerman, Create-A-Check expert, to learn:
- Advances in construction payment automation
- How to increase payment control while decreasing financial risk
- How mobile platforms support the automated payment process
Plus, see a demo of the AvidXchange solution including how to handle lien waivers and other compliance requirements around payments

31-2 Workflow Automation: Getting your Business in the Groove - Presented by Core Associates/TimberScan
Session Level: Basic
Who Should Attend: AP/Accounting/Finance professionals who use Sage CRE
Prerequisites: None
Specific Learning Objectives: Initiating, managing, and tracking AP invoices throughout the approval process is a burden of the past. TimberScan, by Core Associates, is the leading AP approval processing and content management software—and the only solution developed exclusively for Sage 300 CRE and Sage 100 Contractor—offering users complete workflow automation. Attend this session to discover how your business can set it and forget it with TimberScan to help make sure AP invoices don’t get stuck in the system. You’ll also be able to assess TimberScan’s auto-indexing for content management as well as our mobile application for your field personnel.

31-3 Streamlining the Cost to Complete Projections and WIP Creation Process – Presented by Cabbage (by Alann, LLC)
Session Level: Basic/Intermediate
Who Should Attend: CPA’s, Owners, Controllers, Accounting and Project Managers
Prerequisites: Basic knowledge of projecting job cost to complete/job cost at completion and Work in Progress reporting.
Specific Learning Objectives: This class will demonstrate how Cabbage Software interfaces with Sage 300 CRE and imports information needed to manage the Cost to Complete process faster than using JC Miscellaneous Worksheets within Sage 300 CRE. You will see how Cabbage streamlines this burdensome process by:
1. Being a cost effective, time saving resource to manage projects
2. Enabling real time data manipulation and generating immediate updates for review
3. Automatically generating an accurate WIP Schedule ready for internal and external use
4. Being a multi-user system
5. Allowing the recording of comments and notes
6. Managing subcontract buyouts and viewing commitments
7. Being able to drill down and view actual cost transaction level entries

31-4 What Is The Right Place For Your Workload – On Premise or Private Cloud? - Presented by Aktion Cloud & Managed Services
Session Level: Basic/Intermediate
Who Should Attend: Technical, Financial, Executive, Sage 100, and Sage 300 Attendees
Prerequisites: None
Specific Learning Objectives: Location. Location. Location. The most important factor in determining real estate value, right? Location is an equally important consideration for Construction Companies wanting a modern infrastructure that supports innovative technologies – such as Cloud – and reduces costs/improves profitability. Where do you deploy business-critical, computing workloads? Move everything to the Cloud? Keep on-premise? Or, is the right answer a hybrid Cloud environment? The good news is – there is no one right answer. There is only one right answer for your business. This session, conducted by Steve Rogers, Aktion’s Cloud & Managed Services Manager, will address the steps Construction Companies need to take to determine the right location for your workloads, including your Sage Construction application solutions. You’ll leave the session with an actionable process for determining workload deployment, setting the stage for a modern, scalable, secure, robust infrastructure architected for future growth and profitability. Setting the stage for your business to make money and save money.

31-5 Self Empowered Financial Reporting - Presented by Event 1 Software
Session Level: All levels
Who Should Attend: Sage 300 CRE or Sage 100 Contractor – Anyone interested in Financial Reporting, especially Controllers, Finance, Executives, and Owners
Prerequisites: Working Knowledge of Excel
Specific Learning Objectives: Timely and accurate financial reporting is essential to any profitable business. It is something the business must achieve regardless of the flexibility and functionality of an ERP system's financial
reporting solution. In this session, you will gain practical experience with Liberty Reports, an Excel-based financial reporting add-in that will allow you to become self-empowered in achieving your financial reporting objectives.

- How to connect to and present any information in your Sage 300 CRE or Sage 100 Contractor database for Financial reporting or backup.
- How to create a formatted financial statement that will refresh on demand.
- How to present information in separate databases on a single financial report
- How to drill into detail and allow the entry and retention of numbers and comments next to your respective accounts.

31-6 Core Cloud Systems: Connecting the Field to the Office - Presented by Core Associates/TimberScan
Session Level: Intermediate
Who Should Attend: Professionals currently using manual methods or multiple Information Systems to manage business data.
Prerequisites: None
Specific Learning Objectives: There’s now a single platform available to help you manage various aspects of your business’s vital data. From creating forms and portals to collecting information from employees and subcontractors, Core Cloud Systems (CCS) introduces a holistic way to manage it all while integrating with TimberScan and Sage 300 CRE. Take a look inside CCS to consider how this revolutionary product can help your business with solutions for Purchase Order/Inventory, Daily Reports, Payroll Time Entry, Subcontractor Portals, and more!

31-7 Add Mobility to Time Entry and Daily Logs - Presented by hh2 Cloud Services
Specific Learning Objectives: A lot of time can be wasted on a job site, as you, your workers, your superintendent and your foremen need to go back to the trailer or the home office to keep track of what everyone is doing. You may carry a clipboard with you to take notes, and then do data entry when you take a break. Why not make the payroll and field reports process mobile? Carry a smartphone or tablet with you and enter your information—employees’ hours, cost codes, jobs—directly into your accounting system.

31-8 Design-Build Your Own Construction, Financial and Service Management Dashboards for Sage 300 CRE - Presented by Anterra Technology
Who Should Attend: CFO’s, Controllers, Accountants, Construction Executives, Project Managers
Prerequisites: None
Specific Learning Objectives: Operational and financial staff need key performance indicators to see where they are on and off plan. We will show you how you or your staff can design and build your own dashboards, graphs and pivot grids to customize your reporting to the way your business works. All of these reports drill to underlying transactions.
Our reporting now spans financial, construction, equipment and service management so you can fully understand all of your operations in one reporting tool that works in the office or in the field on mobile devices.
Come see the best reporting technology available for construction companies today.

31-9 Why Excel Is Your Most Effective Business Tool - Presented by Event 1 Software
Session Level: All Levels
Who Should Attend: Sage 300 CRE and/or Sage 100 Contractor, Controllers, IT, Finance, Operations, and Executives
Prerequisites: A basic knowledge of Excel
Specific Learning Objectives: In this session we will explore the credible objections to business use of Excel and learn how business practice and technology can neutralize these objections leaving you with the most power and intuitive business tool available. Best of all? You likely already own it so No Purchase Necessary!

- Identify compelling reasons why Excel is valuable to your company.
- Identify and qualify perceived barriers or objections to using Excel
- Demonstrate how you can neutralize these objections with business practice and technology.
31-10 New Financial Reporting for Sage 300 CRE – Presented by Anterra Technology

Who Should Attend: CFO’s, Controllers, Accountants, Construction Executives, Project Managers
Prerequisites: None

Specific Learning Objectives: Learn how to create custom financial reports, graphs and dashboards that are easy to build and maintain. We will show you how you can build better financial reporting to make your job easier and give you better visibility into your operations. Create financial dashboards that includes drill through graphs of cash, working capital, receivables, payables or any calculation you want to graph. Our financial statement builder lets you construct calculations like overhead expense as a percentage of revenue and then add that calculation as a graph on a shared or private dashboard. Come see the best financial reporting technology available in the construction industry today.

31-11 Automation? Yes, Please! AP Processing and Content Management with TimberScan – Presented by Core Associates

Session Level: Basic

Who Should Attend: AP/Accounting/Finance professionals who use Sage CRE
Prerequisites: None

Specific Learning Objectives: With off-the-shelf Sage 300 CRE and Sage 100 Contractor integrations, TimberScan, by Core Associates, helps over 25,000 users simplify their AP processing, and more! Attend this session to see what makes TimberScan the leading solution for AP workflow automation with Sage CRE, plus learn, in-depth, how TimberScan Capture converts and indexes invoices with OCR technology. You’ll also be able to assess our mobile application for your field personnel.

31-12 HR From a Construction Point of View - Presented by hh2 Cloud Services

Specific Learning Objectives: Reduce the amount of time spent managing HR tasks by taking them to the cloud with hh2 Human Resources. A convenient, easy-to-use interface gives your HR administrator quick access to emergency contacts, evaluations, certifications, classifications, payroll history, accruals and raise requests. Permissions can be granted to allow managers and employees to access features important to them. Syncs seamlessly with Sage 300 Construction and Real Estate.

31-14 3 Ways Mobility Saves over $1 Million in Labor Costs – Presented by AboutTime

Session Level: All

Who Should Attend: Owners, HR, Payroll, IT, Office Managers, Accounting Managers and VPs
Prerequisites: None

Specific Learning Objectives: We live in a mobile world where most people use more than one device to get work done. Businesses are looking for ways to better connect their teams in real-time and know that harnessing the power of mobile technology is key. Learn how mobile technology is changing the way that leading construction companies are doing business with greater efficiency, productivity, and profitability.

In this session, we will present our customer success with Progressive Roofing. We’ll share how they used AboutTime Enterprise Suite and Sage 300 CRE to connect the field staff with mobile devices for real-time insight into labor, assets, project progress documentation and productivity. Also, find out how the weather feature in AboutTime Enterprise Suite helps to resolve internal and external customer conflicts.

In this session, you will learn how Progressive Roofing used AboutTime Enterprise Suite with Sage 300 CRE for employee time tracking, asset tracking and mobile forms to:

• Reduce OT costs by $1.22 million in 3 months post implementation
• Created national standardization to achieve cost savings of $1.47 million annually
• Used mobile safety forms to save $456,000 annually