



Meridian Professional Services



PROLIANCE

2009

Course Catalogue

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Proliance[®] Classroom Learning

Experience the benefits of face-to-face education with Meridian Systems classroom learning. Participants have the opportunity to ask questions directly, share ideas with peers and participate in hands-on labs.

Choose from our comprehensive set of education modules to design the education program that will fit your company's needs. You can focus on the topics and users that you need trained at a specific stage of your Proliance implementation for efficient, just-in-time training. Courses can be conducted at your company or at Meridian headquarters in Folsom, CA.

Meridian provides different levels of training for different audiences. The Education Team has designed the materials in a modular fashion so that units can readily be added or removed to tailor a class to a particular customer's needs.

Some of the objectives achieved through Proliance Classroom training include:

- ✓ The knowledge to take advantage of the powerful Proliance Workflow Engine
- ✓ A strong functional understanding of Proliance business applications
- ✓ The ability to shape the implementation through the use of templates and configuration tools

To schedule classes for your staff, please contact your Meridian Account Manager or email us at education@meridiansystems.com.



Standard Proliance® Courses

The education experts at Meridian Systems have designed the following courses to provide comprehensive knowledge of Proliance. You may schedule these courses as they're described here or you may choose to custom-design a program to focus on specific Proliance business applications. Detailed descriptions of the modules within each of these courses follow in this catalog.

Foundations

This 2-day course provides users with the foundation upon which other courses will build. **We recommend that you always include this course in your education program** to ensure that your users have all of the basics regarding how to use Proliance.

Audience:	<ul style="list-style-type: none"> ✓ Anyone who will be using Proliance
Knowledge to Leverage:	<ul style="list-style-type: none"> ✓ Using Proliance to support Business Process Management (BPM) ✓ Taking advantage of the powerful Proliance Workflow Engine
Tools to Use:	<ul style="list-style-type: none"> ✓ Communication, Reporting, Views ✓ Creating new Programs & Projects

Business Applications

This course provides deep functional understanding of Proliance through demonstration, discussion and hands-on practice applying real-life scenarios to the use of the Proliance business applications. Course length ranges from 3-5 days depending on which applications you are utilizing.

Audience:	<ul style="list-style-type: none"> ✓ Users of Proliance (modular design allows users to attend just the sections most relevant to their jobs) ✓ Proliance support staff and system administrators
Knowledge to Leverage:	<ul style="list-style-type: none"> ✓ How Proliance documents will support your business processes and interrelate with each other ✓ Ability to make decisions on how to best utilize Proliance functionality
Tools to Use:	<ul style="list-style-type: none"> ✓ Practical understanding of how to use Proliance Contracts, Drawings, Correspondence, Invoices, Cost Reporting and other features.



Proliance System Administrators

Technical staff will learn how to implement and support Proliance in this 2-3 days course depending on participants existing level of Proliance knowledge.

Audience:	<ul style="list-style-type: none"> ✓ Technical support staff ✓ Proliance administrators
Knowledge to Leverage:	<ul style="list-style-type: none"> ✓ Shaping the initial Proliance implementation ✓ Tailoring Proliance to your company's requirements
Tools to Use:	<ul style="list-style-type: none"> ✓ Program and Project Templates ✓ Configuration tool for field requirements, names, related lookups ✓ Settings for user accounts, security roles and permissions ✓ Workflow configuration for Proliance documents

Extendibility

For members of Meridian Development Network (MDN) Meridian technical consultants provide custom sessions to teach technical staff how to extend the capabilities of Proliance by integrating with third party applications and reporting tools. To learn more about the Meridian Development Network, please visit us at <http://www.meridiansystems.com/products/proliance/developernetwork.asp>

Audience:	<ul style="list-style-type: none"> ✓ Technical staff ✓ Proliance administrators ✓ Report Writers
Knowledge to Leverage:	<ul style="list-style-type: none"> ✓ Use of Proliance Integration Services ✓ Office to Proliance Integration
Tools to Use:	<ul style="list-style-type: none"> ✓ Security Database Views ✓ Proliance Integration Accounts ✓ Visual Studio .NET

Proliance Intensive

Power users and implementation team members will learn about Proliance applications and an overview of configuration and support in this 5-day course. It is an overview of Foundations and Business Applications curriculum. It is intended for people who will be designated as "Power Users" of the Proliance system or are participating in making decisions regarding configuration and implementation.

Custom Print Layouts

This session teaches technical staff how to create and use Custom Print Layouts as reporting tools.

Audience:	<ul style="list-style-type: none">✓ Technical staff✓ Proliance administrators✓ Report Writers
Knowledge to Leverage:	<ul style="list-style-type: none">✓ Use of Proliance Reporting Tools✓ Custom Print Layouts
Tools to Use:	<ul style="list-style-type: none">✓ Practical understanding of how to design Custom Print Layouts in either Word or Excel and then how to make them available to use for Proliance reporting.



Proliance Scheduling

This session teaches technical staff how to design Schedule Templates, Scheduling Views and Reporting to best customize the Proliance Scheduling capabilities to manage tasks and resources in the projects.

Audience:	<ul style="list-style-type: none">✓ Technical staff✓ Proliance administrators✓ Power Users
Knowledge to Leverage:	<ul style="list-style-type: none">✓ Use of Gantt Views✓ Tasks and Resources Management✓ Critical Path Analysis✓ Baselines
Tools to Use:	<ul style="list-style-type: none">✓ Scheduling Configuration Components✓ Scheduling Templates✓ Scheduling Views, Reporting, and Exporting Options



Foundations

This 2-day course provides users with the foundation upon which other courses will build. **We recommend that you always* include this course in your education program** to ensure that your users have all of the basics regarding how to use Proliance. *This content is already part of the Proliance Intensive course.

DAY	FOUNDATIONS COURSE TOPICS
1	<p>Introduction to Proliance</p> <p>Learners will gain a basic understanding of what Proliance is and how it is structured. After this course, the trainee will be able to envision how Proliance may be used in his/her organization and how it will increase efficiency in the work they typically do on a project.</p>
1	<p>Proliance Workflow & Business Process Management (BPM)</p> <p>Attendees will gain a foundation of knowledge regarding Business Process Management and Workflow so that as they move onto more detailed, feature-specific training, they will understand how Proliance supports BPM, and they will have a frame of reference for workflow concepts. Users will learn about Proliance workflow, both conceptually and in a very hands-on sense through an enactment of an actual workflow process.</p>
1	<p>Navigating Proliance with Confidence</p> <p>Attendees will learn how Proliance workspaces are organized, about Organizations, Programs and Projects and will see helpful tips and tricks to make their Proliance experience faster, easier, and more productive.</p>
1	<p>Effective Proliance Project Communication</p> <p>Attendees will learn how notices are used in Proliance to inform users of updates or actions needed on a project. They will also learn how to best utilize the various Notices views and how to set up Email Notification for even more convenient access to Proliance data.</p>
1	<p>Proliance Reports & Views</p> <p>Attendees will learn how to tailor views of document Registers to show the information they want most as well as learn how to create ad hoc reports from documents or registers.</p>



DAY	FOUNDATIONS COURSE TOPICS
2	Contact & User Administration Attendees will learn how to setup new contacts, staff, and company information. They will be able to not only enter basic contact information but also setup a user account allowing others access to Proliance, and be able to setup roles and security permissions.
2	Overview of Security and User Accounts Attendees will learn how security roles and user accounts control which documents and workspaces users can view or take action upon.
2	Creating and Managing Projects & Programs Attendees learn how templates are used behind the scenes to create projects and standard documents for use in projects, as well as how to create new projects, assign contacts and staff to a project, and create Project Summaries. Attendees will also learn how to use Programs to better organize their projects and to allow faster ramp-up on future projects.



Business Applications

This course provides deep functional understanding of Proliance through demonstration, discussion and hands-on practice applying real-life scenarios to the use of the Proliance business applications. Course length ranges from 3-5 days depending on which applications you are utilizing.

DAY	<i>BUSINESS APPLICATIONS COURSE TOPICS</i>
Office Management	
1	<p>Correspondence</p> <p>Correspondence documents are used to track correspondence such as verbal conversations, emails, faxes, and letters. They provide an audit trail of information and the ability to have an archived copy of information that was recorded.</p>
1	<p>Meeting Minutes</p> <p>You can use Meeting Minutes to record meeting details such as attendees, topics, action items, and status. You can also create Meeting Sets to save time entering recurring meetings, and carry over unfinished business from previous meetings in a set.</p>
1	<p>Managing & Tracking Requests for Information (RFIs)</p> <p>Attendees will learn all of the basics of creating RFIs, updating them, and typical workflow processes associated with them. In addition, they will also learn how RFIs can be grouped together in "RFI Issues" and how RFIs may interrelate with other documents, such as quotes or change orders.</p>
1	<p>File Management: Using Catalog Cards</p> <p>This unit shows how Catalog Cards are used to manage external files, such as photos, spreadsheets, and document files. Users will learn how they can upload files to the File Management Server individually and as a batch.</p>
1	<p>Managing & Tracking Submittals</p> <p>This quick unit shows attendees how to create and update submittal documents and to group those documents into packages. Includes discussion of key uses for these documents and typical workflow processes.</p>



DAY	<i>BUSINESS APPLICATIONS COURSE TOPICS</i>
1	<p>Managing Drawings and Using View & Redline</p> <p>This unit provides understanding of the power behind Proliance drawing management – attendees will learn not only how to upload and track drawings and related workflow, but will also see how specific review steps can be defined for drawings, how drawings are grouped into packages, and how to use the integrated view and redline tool to mark-up drawing files from various programs.</p>
1	<p>Using Transmittals to Manage Drawings</p> <p>This unit shows how to use Transmittals to manage drawings, drawing revisions, and the review process. Attendees will learn how to create transmittals, add drawing documents, define the review steps, and assign reviewers. It also provides information on the different reporting options for transmittals.</p>
Field Management	
2	<p>Daily Work Journals & Deficiency Lists</p> <p>This section provides practical tips and tricks on how to use the tracking tools available from Proliance that will keep on-site work rolling and provide audit trails. Includes demonstration and hands-on practice with Daily Work Journals and Deficiency Lists (Punch Lists).</p>
Scheduling Management	
2	<p>Introduction to Scheduling Application</p> <p>In this unit, attendees will be introduced to Scheduling Application views, components, and available functionality for task and resource management of the project. For in-depth knowledge of the Proliance Scheduling, how to configure schedule templates and what are the best practices of using Scheduling to manager your projects tasks and resources, please sign up for the full 8 hours Proliance Scheduling course.</p>



DAY	<i>BUSINESS APPLICATIONS COURSE TOPICS</i>
Budget & Cost Management (BCM)	
3	<p>BCM: Budget & Cost Documents and the ACR</p> <p>In this section, attendees learn about the features that are at the heart of Budget & Cost Management. Attendees will learn how to use:</p> <ul style="list-style-type: none"> • Scope documents to record budget and planned spending • Cost Accounts for budgeting and cost forecasts, and group and filter expense & revenue amounts • Transfer documents to move money between Cost Accounts • Cashflow documents to provide feedback to project participants • The Anticipated Cost Report (ACR) for solid project finance planning through its summarization of a project's budget, costs, billings, and invoice information
Contract Management	
4	<p>Creating and Managing Contracts</p> <p>In this unit, attendees will learn about the different types of contracts available in Proliance (Revenue or Expense, Pre-Commit or Auto-Commit), and how to use Proliance to ensure proper approval and updating of contract information. Includes strategies on when to use the various types of contracts and how to effectively manage changes through Change Orders and Cost Events.</p>
4	<p>Effectively Utilizing Instructions & Quotes</p> <p>This unit provides guidance on how to use instructions to ensure that changes are processed correctly and how to use Proliance Quote documents to structure required information.</p>
4	<p>Managing Change with Cost Events and Change Orders</p> <p>In this section, attendees will learn how to use Cost Events to initiate and review changes to contracts. They will use Cost Events to create Change Orders to approve and finalize the changes.</p>



<i>DAY</i>	<i>BUSINESS APPLICATIONS COURSE TOPICS</i>
4	Managing Invoices and Payments Attendees will learn how to utilize invoices to track expenses and revenues. They will learn how payment logs can be used to track actual payments made by their company using an external accounting system.

Proliance System Administrators

Technical staff will learn in this course how to implement and support Proliance.

DAY	CONFIGURATION & SUPPORT COURSE TOPICS
Overview	
1	<p>Proliance Overview</p> <p>After this unit, attendees will understand how Proliance services and applications are organized, how databases are typically structured, and have a foundation for diving into the details of Proliance. They will also learn about login options, Proliance workspaces, and basic navigation.</p> <p>Attendees will gain a solid understanding of what Business Process Management is and how Proliance supports it. They will learn how the Proliance workflow engine can be utilized to improve processes, where workflow manifests itself in the configuration tool, and the class will define some realistic workflow processes based on company policies and procedures.</p>
1	<p>Proliance Architecture Overview and Configuration Tools</p> <p>This section provides an overview of the Proliance configuration tools and when you should utilize each one, Proliance architecture, and integration options.</p> <p>In the Xdocs and Data Structure module, administrators gain the foundation they will need to understand Proliance Xdocs as well as the document models that define all documents and fields.</p>
1	<p>Review of Security Roles and Categories</p> <p>Attendees will review Security Roles and Categories covered in the Foundations class to gain a better understanding of how security is related to configuration.</p>
2	<p>Cost-Related Configuration Settings</p> <p>Attendees will learn about Cost Account Grouping Codes, Cost and Internal Periods, Limits of Authority and Holds are used in Proliance during configuration. They will work with each and setting and/or document to see the impact on workflow, tracking, and reporting.</p>



DAY	CONFIGURATION & SUPPORT COURSE TOPICS
Local Administration Configuration Tool	
2	<p>Configuration Setup: First Steps</p> <p>After a quick review of the overall steps for configuring Proliance, attendees will learn via hands-on practice what the first steps are for configuring a new Proliance installation, including defining the File Management Server (FMS), mark-up directory, and the creation of an Organization account and an administrative user.</p>
2	<p>Creating and Modifying Templates</p> <p>After this unit, attendees will understand what templates need to be created for a successful implementation and will know exactly how to create Organization, Program, Project, and Document templates.</p>
2	<p>Configuring Document Templates and Workflow</p> <p>In this section, attendees will make the workflow defined in the previous section come to life by configuring workflow for a specific document. After configuration, users will have the opportunity to view the document from the user perspective and see the notices and state changes generated by that workflow template.</p>
2	<p>Setting Field Attributes</p> <p>During a hands-on exercise to create the various templates and define workflow for a specific document, attendees will learn how to take advantage of the flexibility in Proliance to configure field settings to match their company's needs. Topics covered include setting default values, marking fields as required, showing or hiding fields, and setting editing permissions at the field level.</p>
Resource Editor	
3	<p>Tailoring Field Nomenclature</p> <p>Attendees will learn how to create custom cultures to fit company lingo or to adapt for use in other countries. They will use Resource Editor to identify and modify Proliance fields for the custom culture.</p>



DAY	CONFIGURATION & SUPPORT COURSE TOPICS
Lookup Editor	
3	<p>Lookup List Configuration</p> <p>To ensure consistent use of company terminology and improve reporting, Proliance offers the ability to create lookup lists tailored to your organization. This unit describes how to create those lists.</p>
Troubleshooting & Support	
3	<p>Installing Service Packs</p> <p>Learn how to efficiently install Proliance upgrades and service packs.</p>
3	<p>Troubleshooting Tips & Resources</p> <p>Hear about the most frequently asked questions from users and learn about the resources available to you to assist you in supporting your users.</p>

Proliance Extensibility

Technical staff will learn how to integrate Proliance with several third party applications in these Live Meetings courses.

HOURS	PROLIANCE EXTENSIBILITY COURSE TOPICS
2	<p>Reporting with SQL Database Views</p> <p>This section provides an overview of how to use SQL Database views to design and provide access to report in Proliance.</p>
2	<p>Proliance Integration Web Services</p> <p>In this module, administrators learn what integration means in Proliance, the architecture and types of integration, and when to use each. They will have hands-on exercises to create an integration account and build a sample ADM listener and sample client.</p>



Custom Print Layouts

Technical staff will learn how to design and apply Custom Print Layouts reporting in this course.

<i>HOURS</i>	<i>CUSTOM PRINT LAYOUTS</i>
1-2	After this unit, attendees will know how to design custom print layouts for use in Proliance, and how make them available for projects and program use.

Proliance Scheduling

In this course, technical staff will learn in depth how to design Schedule Templates, Views and Reporting to best utilize the Proliance Scheduling capabilities to manage tasks and resources in the projects.

<i>HOURS</i>	<i>PROJECT SCHEDULES, RESOURCES, AND SCHEDULE REPORTS</i>
8	<p>In this course, attendees will create a new project schedule and explore the various settings that help them track vital project information. Attendees will also learn about resources, including how to assign resources to a project, record expected hours, and other pertinent information regarding resources.</p> <p>In the reporting section of this unit, all of the methods for extracting information from a project are covered, including configuring custom on-screen views and available reports.</p> <p>Attendees will then learn about how Proliance Scheduling can help keep projects on task and the best practices for utilizing the Proliance Scheduling Application through baselines, critical path analysis, and project status date.</p>

Need more information?

Please contact us at education@meridiansystems.com