

Meridian Education Services



Proliance Intensive

Who Should Take This Course

Anyone who wants a comprehensive understanding of all Proliance features and applications. This class is ideal for those who will be making decisions regarding implementation and configuration. For end-users who will be focused in just one area of the applications, more application-specific training classes are also available.

Prerequisites or Prior Knowledge:

An understanding of the AEC industry, your company's business processes, and basic computer skills. No prior knowledge of Proliance is required.

What You Will Learn

This class will provide you with a solid understanding of how and when to use Proliance, how to navigate within it, and how to use its business applications and services to increase your efficiency, auditing, reporting and collaboration on any project.

<p>Knowledge to Leverage</p>	<ul style="list-style-type: none"> ✓ Using Proliance to support Business Process Management (BPM) ✓ Taking advantage of the powerful Proliance Workflow Engine ✓ How Proliance will support your company's business processes and increase collaboration and efficiency. ✓ Ability to make decisions on how to best utilize Proliance functionality
<p>Tools to Use</p>	<ul style="list-style-type: none"> ✓ Projects to centralize all of your project work ✓ Programs to group projects and view data or manage configurations across multiple projects ✓ Workflow and security to protect information where needed and keep processes flowing smoothly ✓ Comprehensive Budget, Cost and Contract management tools to collect the right data and enforce approval processes ✓ Change Management Tools to effectively manage the inevitable changes on a project ✓ Reporting tools to give easy access into any project data ✓ Anticipated Cost Report (ACR) provides a complete, interactive report of all budget, cost, invoice, and variance dollar figures on a project

Topic Descriptions

Foundations

After this unit, you will know the benefits Proliance can bring to your company and understand how it is structured and typically deployed. In addition, you'll learn about the configuration options available within Proliance to aid you in making decisions regarding implementation and usage.

Introduction to Proliance

This unit covers what Proliance is and how it is structured. You will learn what Business Process Management is and how it is supported by Proliance. You will also gain an understanding of how the Proliance workflow engine works behind the scenes as well as how you utilize it in the application.

Navigating with Confidence

This section covers how the user interface of Proliance is organized. You will learn about each of the workspaces, what functions you can do in each, and get a few tips on how to easily navigate in Proliance.

Effective Project Communication

Proliance uses Notices to automate communication when a workflow action is required. You will learn about the different types of notices, what action is required, and how to set up email notification for even more convenient access to Proliance data.

Reports and Views

In this unit, you will learn how views are related to reports in Proliance, how to modify your views of the application to readily find the information you want, how to use ad hoc reporting, and what other reporting options are available.

Address Book and Security

This topic shows you how to get the system rolling by setting up Companies and Contacts, how to enable User Accounts, and how to create Security Roles and set permissions.

Management Plans

You will learn how to formalize processes that do not quite fit into an existing Proliance application or process by using a Management Plan. This unit covers all the necessary components – forms, templates, and plans – that make up a Management Plan.

Programs and Projects

This section covers how to get a project started by creating Programs & Projects. You will learn how Programs help you better organize projects, how to create project templates, how to add users to programs and projects, and how to create Project summaries.

Business Applications

Office Management

In the Office Management unit, you'll learn all about the tools in Proliance that assist communication and review processes.

You'll learn how to:

- Record conversations, faxes, emails, etc. for later reference (Correspondence)
- Easily set Meeting Agendas, record Meeting Minutes and carry forward open action items to a new set of Meeting Minutes
- Manage & track Requests for Information (RFIs)
- Use Catalog Cards to upload and manage external files
- Use Submittals and Transmittals for not only recording information about the topic at hand but to setup a detailed, enforced review process as well, that notifies the next-in-chain reviewer when to step in
- Manage the Drawing review process as described above and use the Brava! file editor to view drawings, mark them up with edits, and view other's edits – either individually or layered

Field Management

In this unit, you'll learn how to use Work Journals and Work Journal Sets to record a myriad of information about the daily activities of a site. You'll see how you can record information regarding weather, equipment usage, labor, and more. In addition, we'll explore the Deficiency List (Punch List) document so you'll know how to record site issues as well.

Scheduling Management

In this section, you'll learn how to use Proliance Scheduling tools to effectively plan a project's timeline and resources. Learn about the flexible resource and calendar tools that allow you to setup tentative schedules at the start of a project and then firm up resources and dates as the project begins.

You'll learn how to:

- Setup calendars for various shifts and holiday schedules
- Define resources to be used in a project
- Create new schedules with summary tasks, linked tasks, and more
- View schedules in Collaborative or CPM Gantt charts

Budget & Cost Management

In this unit, you'll not only learn how to create the Budget & Cost documents such as Cost Accounts, Cashflow, Transfer and Scopes but you will also learn how to effectively use the Anticipated Cost Report (ACR) to keep you finger on the pulse of your project's financial health.

Through the use of a guided exercise, you'll put all of your new Proliance knowledge to use as you:

- Create Cost Accounts
- Define project budget (Scope Document)
- Fund Cost Accounts (Scope handoff)
- Manage cost allocations (Transfers)
- Commit funds and drawdown cost accounts (Contracts)
- Manage Changes (Cost Events & Change Orders)
- Monitor the financial health of the project throughout using Anticipated Cost Report (ACR)

Contract Management

In this portion of the course, you'll first receive an overview of how Contract Management interacts with Budget & Cost functions in Proliance and how all of these tools provide you with powerful tools to define budget, manage cost allocations, control the commitment of funds, and efficiently manage changes, all the while with visibility into finances during every phase of the project.

After the overview, you'll learn how Proliance's robust Contract and Change Management tools will help you with:

- Creating Contracts that not only store critical data regarding scope of work, terms and conditions and committed dollars but also provide extensive controls over how invoices and changes related to the contract are handled and approved.
- Change management from the initial phases when costs are still preliminary all the way through finalizing plans and costs and committing to the change.
- Invoicing and payment tools to help track expenses and revenue, plus integrate with existing account applications.

Typical Agenda

This class is a combination of Lecture, Demonstration, Hands-on Practice, and Discussion of how concepts and features learned will apply at your company. Each class day includes breaks and lunch, resulting in a daily in-class time of approximately 7 hours.

Day One	Foundations <ul style="list-style-type: none"> • Introductions & Class Objectives • Introduction to Proliance • Proliance Deployment & Configuration Options • Proliance Workflow & Business Process Management • Navigating Proliance with Confidence • Project Communication (Notices) • Reports & Views • Companies & Contacts (Address Book) • Creating Users & Setting Security Permissions
Day Two	Foundations, continued... <ul style="list-style-type: none"> • Defining Management Plans • Creating New Programs & Projects Office Management <ul style="list-style-type: none"> • Overview of Office Management Functions • Correspondence • Meeting Minutes • Managing & Tracking Requests for Information (RFIs)
Day Three	Office Management cont'd <ul style="list-style-type: none"> • File Management with Catalog Cards, Submittals, and Drawings • Managing Drawings: Tracking & Redlining Field Management and Transmittals Field Management <ul style="list-style-type: none"> • Deficiency Lists (Punch Lists) • Daily Work Journals and Sets Scheduling Management <ul style="list-style-type: none"> • Creating a New Project Schedule

	<ul style="list-style-type: none"> • Managing Project Resources • Reporting and Viewing Project Information • Keeping Projects on Task with Scheduling Management
<p>Day Four</p>	<p>Budget, Cost & Contract Management</p> <p>Budget & Cost Management (BCM)</p> <ul style="list-style-type: none"> • Review Budget & Cost Management Functions • Overview of Cost Accounts • Establishing budgets with Scope Documents • Overview of Anticipated Cost Report (ACR) • Use of Transfer Documents • Forecasting Spending with Cashflow Document <p>Contract Management</p> <ul style="list-style-type: none"> • Creating & Managing Contracts • Change Orders
<p>Day Five</p>	<p>Budget, Cost & Contract Management, continued...</p> <ul style="list-style-type: none"> • Invoices & Payment Logs • Cost Events (Potential Change Orders) • Instructions & Quotes <p>Review & Next Steps</p> <ul style="list-style-type: none"> • Review topics covered • Resources • Discuss next steps