



## Managing Contracts in Primavera Contract Manager Rel. 12

### COURSE CODE: D56908GC10 COURSE OUTLINE

**Duration:** 3 Days    **Price:** RM 3,090 per person    **PDU:** 19.5    **CEU:** 1.95    **Provider ID:** 1492    **Location:** EBS Training Room, Plaza Mont Kiara, Kuala Lumpur.

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

#### Audience:

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

#### Learning Outcomes:

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

#### Required Prerequisites:

- Functional knowledge of MS Windows and Internet Explorer

#### Course Objectives:

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

#### Enterprise Business Solutions Sdn Bhd

A-10-P1, Block A, Plaza Mont' Kiara, No.2 Jalan Kiara, 50480 Kuala Lumpur

Tel: +603 6201 3848 Fax: + 603 62013849

Email: training@ebs.net.my; balvin.kaur@ebs.net.my



## Course Topics:

### Introduction to Contract Manager

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

### Creating the Company Directory

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

### Create a Project

- Create a project using the New Project wizard

### Tracking Drawings

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

### Communicating Project Information

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

### Logging and Tracking Submittals

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

### Documenting Project Issues

- Define an issue
- Create an issue
- Link documents and attachments to an issue
- Document an issue by searching through project documents and attachments

### Recording Project Communications

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

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## Managing Project Costs

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

## Awarding Procurement Items

- Document bids
- Compare bids
- Award procurement items

## Using Contracts, Purchase Orders, and Trends

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

## Change Management

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

## Payment Requisitions

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

## Approval Process

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

## Customizing Layouts

- Create a layout
- Filter a layout
- Sort a layout
- Group a layout
- Export logs to Excel

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