



# SESSION DESCRIPTIONS

## 2021 TUG National Users Conference

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*\*\*Disclaimer: session titles, descriptions, and availability as well as software versions are all subject to change*

## Track 01: Ask the Experts: One-on-One Booths

Software Versions: TBD

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### One-on-One Booth: Sage 300 CRE

**Knowledge Level:** Intermediate

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

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

**Learning Objectives/Description:** 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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## *Track 02: Industry Issues/Theory*

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### Surviving a Sales Tax Audit

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Anyone who has responsibility for Sales & Use Tax

**Prerequisites and/or Advance Preparation:** Understanding of Sales & Use Tax

**Learning Objectives/Description:** Tips and Tricks that provide a solid foundation for being equipped to survive a Sales & Use Tax audit

### General Contractor Roundtable

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** General Contractor CFOs, Controllers, Project Managers, Project Accountants

**Prerequisites and/or Advance Preparation:** Knowledge of Sage 300 CRE Job Cost, Commitments, Compliance Management is helpful

**Learning Objectives/Description:** Discuss challenges facing General Contractors and how Sage software can help streamline processes. Also discuss issues affecting GCs in today's construction environment.

### Recruiting and Retaining Competent Personnel Roundtable

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Managers and Owners

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Ever wonder how other companies recruit personnel? Does your company have high turnover and trouble retaining competent personnel? In the fast pace construction industry having longevity in personnel allows for smooth processes from the field to the office. Come join this interactive session with participant discussion about how other companies recruited and what can help in retaining competent personnel.

### Cloud for Dummies

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** If you are interested in gaining a better understanding of the "Cloud", this class is for you.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Cloud vs Internet, what is the difference? Hosting vs Multi-Tenant. which is better? Browser based vs App based, aren't they the same? Single-factor Authentication (SFA) vs. Multi-factor Authentication (MFA), why do I care? These are just some of the "Mysteries of the Cloud" that we will demystify in this session.

### WIP and Forecasting Theories

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** If you are involved with the preparation of your WIP reports, this class is for you. If you are out of Operations or Finance, we will give you a few ideas to discuss with your team when you get back from the conference.

**Prerequisites and/or Advance Preparation:** Some understanding of the Construction Work In Progress reporting process.

**Learning Objectives/Description:** What is the difference between your Job Estimate and your Job Forecast? When should you change your Job Estimate compared to updating your Forecast? There is no absolute answers to these questions. But we will discuss ideas to work into your WIP Process.

### Integrating with Sage 100 Contractor and Sage 300 Construction and Real Estate

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** IT staff or individuals who are asked to "Connect / Integrate" your systems?

**Prerequisites and/or Advance Preparation:** Some understanding of integration methods (i.e. CSV, Import, Export, API, Web Services....)

**Learning Objectives/Description:** We will review the different integration tools that are available in Sage 100 Contractor and Sage 300 Construction and Real Estate. What can you do without a programmer? What are the advantages of using an "Integration Platform"? What platforms work with the Sage construction solutions? These are all topics we will discuss in this class.

### Time Capture Solutions: How to Pick the Right Product

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who would be involved in the evaluation and purchase of of a Field PR Time Capture system

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** If you will be evaluating and selecting a Field Payroll Time Capture solution, this class is for you. We will walk through common requirements that your company should consider when looking at a time capture system. You will be able to take the requirement sheet provided in the class and customize it for your organization.

### Lien Waivers Roundtable

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** CFOs, Controllers, Accounting Managers and Subcontractor Administrators

**Prerequisites and/or Advance Preparation:** Knowledge of Subcontract and Lien Process in Sage is helpful

**Learning Objectives/Description:** Are you effectively tracking and managing Lien and Subcontractor activity? Join us for a review of the features in Sage. We will discuss issues companies experience in different jurisdictions, so bring your questions.

### Specialty Contractors Roundtable

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Any specialty subcontractor

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** The objective is a collaborative exchange of information regarding current issues for specialty subcontractors. The leaders will facilitate the discussion among attendees using their own suggested topics and information, but also giving priority to topic requests from the group. Users should leave the session gaining information from their peers and possible suggestions for follow-up discussions through TUG. The session is open to all users. There may be some reference to software features in the discussion, but the topics are not product specific.

### Cleaning House: File Organization, Best Practices for Closing

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Sage 300 Customers who are responsible for month end closing and archiving processes

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** We will discuss file organization basics like Named vs Unnamed files, File Locations task, Move Transactions tasks and how to apply them to your month and year end processes. How do you archive successfully, while still maintaining access to the data?

We will also discuss how the above concepts would prepare you for a Sage 300 CRE to Sage Intacct Construction data migration

## *Track 03: IT – Advanced Manager*

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### How to Choose a Technology Partner

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** CIOs, IT Managers, Managers needing IT services

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Sharing his 18 years of experience as a Technology Provider and his last 9 years as an IT Manager, our presenter will share ideas and concepts useful in helping you choose a technology partner for any IT project you may have. An open Q&A session will follow this informational presentation. We look forward to you joining us.

### Is Replicating Right for You? (Sage 300 CRE)

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone considering replicating your Sage data

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Trying to decide whether to replicate your data into SQL? Then this session is for you. We will be discussing the benefits and pitfalls of replicating Sage data.

### Intro to Power Pivot

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to take their Excel skills to the next level

**Prerequisites and/or Advance Preparation:** Some Excel knowledge

**Learning Objectives/Description:** In today's fast paced competitive markets, owners and business managers have an ever-increasing need for real time accurate data presented in an easy to read format. The challenges increase when various program databases are stored locally on your server while others are in the cloud. With the vast number of analytic tools available, what tools do you use to assemble all that information into one place to meet the needs of decision makers? Most everyone knows Excel, right? Join us in this session to learn more about modern data analysis in Excel. We show real examples of construction company data presented in an "easy to read" fashion that can combine data from multiple sources. We will discuss how to connect to different data sources, clean up your data, and build interactive reports and visuals.

### Power BI for Sage 300 CRE

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone wanting to see additional presentation of your Sage Data

**Prerequisites and/or Advance Preparation:** Knowledge of Data Base Structure

**Learning Objectives/Description:** See how you can use your data in Various ways to Present to Management without requiring them to use Sage300

### Backup & Disaster Recovery for IT Professionals

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Managers of Sage 300CRE or Sage 100 Contractor systems

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** During this session will discuss the various options available to IT managers for obtaining viable backups and restores. We will discuss backup methods, storage media and locations, redundancy theory, and much more. After this session, you will have the knowledge and the confidence to build your own Backup/Restore solution that fits your specific IT needs.

### Sage 300 Security & Administration

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Individuals who are responsible for administering the Sage 300 CRE security setup and Individuals who are responsible for working with the Sage data from a "System Level" perspective.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This class will review how Sage 300 CRE Security works, what options are available and best practices as it pertains to the setup and administration of Sage 300 CRE security.

### Dissection of a Phishing Attack

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning about Phishing attacks

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this class, we are going to breakdown an actual Phishing Attack, what happened, how it happened, and the ramifications of the attack. We are going to discuss the things you need to pay attention to protect yourself, we are going to discuss how it's done, and preventative measure on protecting

yourself from Phishing attacks. If Phishing and SPAM protection is important to you and your company, come and participate in an open discussion about Phishing.

## *Track 04: IT – Beginner/User*

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### Excel Tips & Tricks I

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in improving Excel Skills

**Prerequisites and/or Advance Preparation:** Basic Excel Knowledge

**Learning Objectives/Description:** In this lab we will look at features of Microsoft Excel to help improve your workflow. This session will look at the Excel workspace, Named Ranges and Data Validation, Flash Fill and Lining Data. Time will be made at the end of the sessions for questions.

NOTE: All three of the Excel Tips & Tricks Sessions are standalone sessions. Each session is designed to look at different features of Excel. Session do not build on the previous session.

### Excel Tips & Tricks II

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Anyone interested in improving their Excel skills

**Prerequisites and/or Advance Preparation:** Basic Excel Knowledge

**Learning Objectives/Description:** In this lab we will look at features of Microsoft Excel to help improve your workflow. This session will look at the Excel Functions and Formulas. Time will be made at the end of the sessions for questions.

NOTE: All three of the Excel Tips & Tricks Sessions are standalone sessions. Each session is designed to look at different features of Excel. Session do not build on the previous session.

### Ask the IT Experts Panel

**Sage Software Type:** Sage 100 Contractor

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** IT Managers, IT Decision Makers, IT Techs

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This moderated session will feature a panel of IT professionals with a wide variety of experience and knowledge ready to discuss any IT related topic. We encourage attendees to bring their IT related questions/problems to our panel for discussion and solutions. If you do not have any IT related questions, you should still consider attending as these types of round-table sessions usually generate very informative discussions.

### Best Practices for Deploying New Technologies

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone that wants to learn how to successfully deploy technology at their company to minimize failures

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This session will discuss the process and ideas that will help you successfully implement technology. We will cover how to identify company needs, the search for vendors, how to test drive potential options, and tips for negotiating a successful contract.

### Cybersecurity: Protecting Data from Server to End Point



**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Anyone involved with protecting corporate data

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this session, our presenter will explore the topic of Cyber Security with a holistic approach. They will delve into all the vulnerable points of data access and how to mitigate the risk of data loss. From where the data is stored, along the path of access and transmission, to the point of creation and retrieval. Industry standards and best practices will be presented and discussed to help keep your data as safe as realistically possible.

### **DATA: Not a Four-Letter Word (Sage 300 CRE)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to learn more about their Sage 300 Database

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Have you ever wanted to write a report or pull data from Sage but struggled to find where the information is stored? If so, then this session is for you. We will start with an overview of how databases are structured, how table dependencies work and general naming conventions for Sage 300 CRE. Next, we will see an example of a data dictionary and how to find the fields you need. You will gain a better understanding of how databases store data and how to find key fields.

### **Staying Competitive in the Age of Technology**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to learn how to find the latest technology trends in their area

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This session will give a list of ideas you can implement at your company to keep you up to date on new ideas and processes that may set you ahead of your competitors. We will also discuss websites, conferences, peripherals, and subscriptions that will be informative as well.

### **Unsolved Mysteries: Office 365 (Part 1 of 2)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in the Office 365 platform

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Microsoft's Office 365 subscription service has quickly become a standard for business productivity and collaboration. However, all the products Microsoft has to offer remain a mystery to many IT professionals. In this 2-part session, we will decode the wide variety of plans they offer and how to choose what is right for your business. Our experts will also give advice on what, when, how, and why to implement various components of the Office 365 platform.

### **Unsolved Mysteries: Office 365 (Part 2 of 2)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in the Office 365 platform

**Prerequisites and/or Advance Preparation:** Attendance of Part 1 would be advised

**Learning Objectives/Description:** A continuation of the Part 1 discussion of what, when, how, and why to deploy Office 365 components. In this session, we will dive into a greater depth of offerings that are not required for most businesses but what is offered and how you might use these additional tools in your business.

### **The Modern Battlefield of Cyber Security in 2020**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in the state of Cyber Security

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Cyber Security is an ongoing discussion so what is the scope of your responsibilities as a company when it comes to Cyber Security. In the Modern Battlefield of Cyber Security in 2020 we are going to discuss emerging threats, we are going to discuss countermeasures, we are also going to discuss legal ramifications and current legislation that you need to be aware of. Security has a wide range of effects and we are going to try to give you a proactive approach to security and some ideas on how to improve your security in 2020.

### Rise of Drones in Construction

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All interested in learning how drones are used in construction.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Attendees will gain insight into how drones are being used on construction projects and how they will be used in the future. You will learn how data can be extracted from drone data and reality capture sessions can be brought back into construction software for analysis.

### IT Talk to Non-IT Professionals

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Managers of IT who are not IT.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** What is the Cloud? What is a VPN? Thick and thin clients are dieting terms, aren't they? What is the difference between a Hosted and a Virtual Server? Bandwidth is just another word for speed, right? In this session, we will have a panel of IT professionals that will answer these IT questions and many more using "non-IT speak" in a way the you can relate to and understand. Feel free to ask any IT related question that you want to know more about. There are no sill questions here. We promise you'll leave with more knowledge and understanding than you came in with.

### Excel Tips & Tricks III

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Anyone interested in improving their Excel skills

**Prerequisites and/or Advance Preparation:** Basic Excel Knowledge including how to create pivot tables and charts

**Learning Objectives/Description:** Learn how to enhance and format Pivot Tables and Charts. Also learn how to protect worksheets and workbooks.

NOTE: All three of the Excel Tips & Tricks Sessions are standalone sessions. Each session is designed to look at different features of Excel. Session do not build on the previous session.

## Track 05: Sage 100 Contractor – Accounting

Software Version: Sage 100 Contractor 23.x

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### Sage 100 Contractor: Let's Get Down to Basics - System Features

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone in your company who works in Sage 100 Contractor

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Sometimes we forget about, or perhaps never knew existed, simple program functions in Sage 100 Contractor. In this session we'll explore ways to speed up data entry, locate data, and other shortcuts that can help streamline your day-to-day use of the software.

### Sage 100 Contractor: Streamlining A/P Process

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Sage 100 Contractor Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** How can you streamline your A/P Process? Join us as we discuss several different areas on how to achieve this. Some features that will be discussed are ACH, Credit Card Process, Paperclip, and Recurring Payables.

### Sage 100 Contractor: Accounts Receivable - Progress Billing

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Any user who provides progress billing and schedule of values to their clients

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Eliminate duplicate entry by using progress billing. Learn the tools available to automate schedule of values, update monthly billings and integrate change orders.

### Sage 100 Contractor: Company Security Setup & Database Administration

**CPE Credits:** 1.5

**Knowledge Level:** Basic to Intermediate

**Who Should Attend:** Company Administrators and IT Department

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** How secure is your Sage 100 Contractor information? During this session you'll learn how to create security groups that are easy to understand and apply them to the hierarchy of menus to control what users can and can't access. We will also review the various "housekeeping" tools of Sage 100 Contractor Database Administration.

### Sage 100 Contractor: I'm Not Saying it's a Payroll Error.... but it's a Payroll Error

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Payroll Processing Personnel

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Let's face it - errors are bound to happen! We'll explore common entry errors and how to correct them, as well as ways to handle some unique situations that are sometimes encountered in the payroll process.

### Sage 100 Contractor: Bill Early...Bill Often with Time & Materials Billing

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** All those who bill their clients as cost plus, cost plus fee, or cost plus on a schedule of values.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Improve your cash flow by billing often through T&M Billing. Learn how to setup T&M, wage rate tables, equipment rate tables, edit costs and how to integrate T&M Billing into Progress Billing.

### Sage 100 Contractor: Form Design Part 1 - Steps to Leaving the "Word" World Behind (Lab)

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users who would like to leave some of the "Word" world behind

**Prerequisites and/or Advance Preparation:** Sage 100 Contractor Report Writer Intro Class helpful but not mandatory

**Learning Objectives/Description:** Do you have forms and templates you've created in Word that you wish you could produce directly out of Sage 100 Contractor? Come to this class and learn how you can use the power of Form Design to make that happen! We'll begin with modifying existing system-supplied forms using various form design tools and from there you'll learn how to create custom forms to meet your unique business requirements.

#### **Sage 100 Contractor: Outsourced Payroll Roundtable**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Payroll Managers

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Thinking of outsourcing payroll? Maybe you already do and want to see how others handle the process. Join our round table as we discuss advantages and different methods of outsourcing payroll.

#### **Sage 100 Contractor: Basic Estimating - SUPER Power: Advanced Techniques (Lab)**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Estimators

**Prerequisites and/or Advance Preparation:** Basic Estimating beginning knowledge

**Learning Objectives/Description:** Take your Estimating skills to the next level, with this interactive hands-on lab, and dive into assemblies - with and without formulas, grids, templates and much more!

#### **Sage 100 Contractor: Best Practices for Accounting Office Procedures**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting Personnel, Owners, Managers, Controller

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Let's work together to create an efficient method for completing routine accounting procedures. We will review typical tasks that are completed in the accounting cycle and how to best use our Sage 100 Contractor tools to complete these tasks in an organized & timely manner.

#### **Sage 100 Contractor: Report Writer 101 - You OUGHT to Know (Lab)**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Report Writers

**Prerequisites and/or Advance Preparation:** Basis Report Writer

**Learning Objectives/Description:** You know the basics of Report Writer, now it's time to take it up a notch! In the LAB your Report Writer toolbox gets an upgrade with Grouping and Subtotaling, Additional fields, advanced selection criteria and calculated fields.

#### **Sage 100 Contractor: Form Design Part 2 - Seeing "Word" in the Rear View Mirror (Lab)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users who are ready to leave some of the "Word" world behind

**Prerequisites and/or Advance Preparation:** Attendance in Sage 100 Contractor: Form Design Part 1 - Steps to Leaving the "Word" World Behind (Lab)

**Learning Objectives/Description:** Let's keep those creative juices and ideas flowing! We'll create basic form design layouts to use when communicating with your Clients, Vendors and Employees. We'll create form designs that TUG Members have requested! Have a specific form design idea or have something you've created that you would like to share? Bring them along and don't forget to bring a thumb drive so you can take the documents back to your office to begin using immediately!

#### **Sage 100 Contractor: Managing and Maintaining Inventory**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Purchasers, estimators, material managers and owners.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Discuss the complexities of maintaining inventory in Sage 100 Contractor. How to keep updated pricing and manage and maintain multiple inventory locations.

### **Sage 100 Contractor: Creating/Organizing and Maintaining Personnel Documents**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Payroll and HR personnel

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** How can you stay on top of employee documentation? Join us as we discuss onboarding/termination and everything in between.

### **Sage 100 Contractor: A/R Billings Roundtable**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Sage 100 Contractor Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Join us as we dive deeper into the topics that were discussed in the lectures, as well as bring your own ideas and questions to discuss with like-minded peers

## ***Track 06: Sage 100 Contractor – Project Management***

*Software Version: Sage 100 Contractor 23.x*

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### **Sage 100 Contractor: Project Management Kickoff Panel - What is Your GOAL?**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Everyone

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** How do you Crack the Labor Code? What resources do you use to locate and find good finished trades technicians? When to use In House Staff vs. Subcontractors? How does Sage help? How do you reach your profit goal with today's labor challenges? Join this early morning panel for solutions to today's tough labor challenges.

### **Sage 100 Contractor: Project Management Workflow Roundtable - Build the Foundation**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Project Managers, Project Assistants

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Job awarded! Now what? This class will guide you through the Job Life Cycle, and the workflow within the different modules. Using Budgets, Change Orders and Job Reports you will make entries and view reports to understand the processes and data throughout the job.

### **Sage 100 Contractor: Basic Estimating - SIMPLE Power (Lab)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Estimators

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hands-on Lab will expose the "Hidden Gems" of Basic Estimating! From Parts and Grids to Markup and Bid Summary, you will be building your own estimate with these tools.

#### **Sage 100 Contractor: Scheduling - Plan for Success! (Lab)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Project Managers, Schedulers, Project Assistants

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Scheduling Unplugged! Do you ever feel like, there are SO many tasks, for every stage of the project, that you just can't seem to keep track of them? Our "hands on" lab will shine the light on the ease and use of Scheduling - from beginning to completion. Let's make scheduling work for you!

#### **Sage 100 Contractor: Subcontracts - Tracking More than Money (Panel)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Project Managers, Project Assistants

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Let's make Subcontracts work for you! Join this panel to explore so many ways to use this module, to save time, money and maybe even an audit question or 2!

#### **Sage 100 Contractor: Report Writer Intro - You NEED to Know (Lab)**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Everyone

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Report Writer - What EVERYONE should know! Our interactive lab will define the components of basic reporting. Create and modify reports, with the use of text, data fields, grouping and subtotaling and a variety of tips and tricks to navigate the useful tool!

#### **Sage 100 Contractor: Purchase Orders - Why Do You Need Them and When Does it Makes Sense to Uses Them?**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Project managers, accounts payable users, accounting and operations managers

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Improve job forecasting, drastically reduce accounts payable invoice entry time and effort, track unit based subcontractors and use master purchase orders to lock in pricing from vendors.

#### **Sage 100 Contractor: Keep Your Finger on the Pulse - Dashboards, Alerts & Scheduled Reports**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Owners and business managers

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn how to customize the dashboard. Use scheduled reports and alerts to keep your fingers on the pulse of the business even when you are away from the office.

#### **Sage 100 Contractor: Change is Good - with Good Change Order Management! Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Project Managers, Project Assistants

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Change orders defined! Create, track and manage your Change Order, from approval, purchase order and billing the client. Let nothing fall through the cracks with this LAB experience.

### Sage 100 Contractor: Document Control - How Was Your Day, Dear?

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Sage 100 Contractor Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** There's a LOT that goes on every day out in the field and in the office - how do you keep track of it all? You'll learn how Document Control can help you manage communications with clients, vendors, & employees, and keep track of important project information. We'll also explore a few "think outside the box" ways of using Document Control.

### Sage 100 Contractor: What are Your Financials Telling You? (Roundtable)

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Owners and managers

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn how your over/under reports affect revenue and your monthly financials. What is your job cash flow and how receivables and payables affect it. What is your monthly break even revenue point.

### Sage 100 Contractor: Report Writer Advanced - You WANT to Know (Lab)

**CPE Credits:** 1.5

**Knowledge Level:** Advanced

**Who Should Attend:** Report Writers

**Prerequisites and/or Advance Preparation:** Report Writer 101- Intermediate

**Learning Objectives/Description:** Advanced Report Writing - Dive into our advanced tips and tricks, including formulas, such as [SELECT FROM WHERE], (IF() THEN() ELSE()), CASE statements and finally- how to create a pop up! You'll leave this session with the ultimate tools in your Report Writing toolbox!

### Sage 100 Contractor: Is Your Equipment Earning Its Keep?

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Project Managers, Estimators, and Equipment Management Personnel; Accounting

**Prerequisites and/or Advance Preparation:** Basic knowledge of Sage 100 Contractor Equipment Management module

**Learning Objectives/Description:** Heavy equipment represents a substantial investment for construction companies. Now, more than ever before, contractors must determine if each piece of equipment is making or losing money for the company. In this session we'll discuss how to track the true cost of owning equipment, how equipment costs show up in job costs, and how they impact your financial statements.

### Sage 100 Contractor: Service Receivables Roundtable

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Those who bill small jobs, parts only, maintenance contracts, and service work orders.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Roundtable discussion on streamlining billing, maintenance contracts and tracking revenue streams.

### Sage 100 Contractor: Sage Service Operations Basics

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** If you use service billing and are looking to expand your dispatch capabilities.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn how SSO can expand your dispatch capabilities and streamline your work order process.

### **Sage 100 Contractor: Unraveling the Mystery of SQL**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to learn how data is stored in SQL

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Ever wondered how data is actually stored in a computer? Register for this session to learn about SQL and how your information is stored in Sage 100. If you have little to no technical skills, this session is for you. You will learn the difference between a SQL database, table, record, and a field and how these objects are used to store and retrieve information in easily understood terms with no confusing tech talk.

## **Track 07: Sage 300 CRE – Accounting Advanced**

*Software Version: TBD*

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### **Reconciliation Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting personnel tasked with reconciling subledgers to the general ledger and reconciling accounts in preparation for financial statements.

**Prerequisites and/or Advance Preparation:** Attendees should be familiar with basic accounting concepts, the basics of Sage and the database

**Learning Objectives/Description:** 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.

### **Contract-Based Billing: CN, BL Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who would like to bill progress billing (AIA) or lump sum invoices using the contract module.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn the setup and workflow process for producing progress billing and lump sum invoices using the contract and billing modules.

### **Reconciliation Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting personnel tasked with reconciling subledgers to the general ledger and reconciling accounts in preparation for financial statements.

**Prerequisites and/or Advance Preparation:** Attendance in session 1 of the 2-part Reconciliation Lab; Attendees should be familiar with basic accounting concepts

**Learning Objectives/Description:** 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.



### **Contract-Based Billing: CN, BL Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who would like to bill progress billing (AIA) or lump sum invoices using the contract module.

**Prerequisites and/or Advance Preparation:** Attendance in Contract-Based Billing: CN, BL Lab - Part 1 of 2

**Learning Objectives/Description:** Learn the setup and workflow process for producing progress billing and lump sum invoices using the contract and billing modules.

### **Subcontractor Compliance: Misc & Certified Payroll Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone responsible for managing subcontractor compliance using Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** We will set up Sage 300CRE to require and record Certified Payroll and miscellaneous compliance and we will look at the reports which show that information.

### **AR/BL Error Correction & Troubleshooting Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone responsible for maintaining accurate accounts receivable agings and fixing any errors associated with them.

**Prerequisites and/or Advance Preparation:** General knowledge of entering invoices via the billing and accounts receivable modules.

**Learning Objectives/Description:** Learn various ways to fix errors in the accounts receivable process (AR, BL, and CN).

### **Advanced General Ledger Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Users familiar with the General Ledger (GL) module

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this hands-on lab you will learn how to setup and use recurring and auto reversing entries. We will then discuss importing concepts and then import transactions into the General Ledger. Expense allocation workflow will also be covered.

### **AR/BL Error Correction & Troubleshooting Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone responsible for maintaining accurate accounts receivable agings and fixing any errors associated with them.

**Prerequisites and/or Advance Preparation:** Attendance in AR/BL Error Correction & Troubleshooting Lab - Part 2 of 2. General knowledge of entering invoices via the billing and accounts receivable modules.

**Learning Objectives/Description:** Continue to learn various ways to fix errors in the accounts receivable process (AR, BL, and CN).

### **AP Advanced: Electronic Payments and Positive Pay**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting Managers, Controllers, AP

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn to create and interface positive pay with your bank.

## Functions and Formulas

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Users of the software who have need to use formulas and functions--particularly in reports, inquiries and payroll processing

**Prerequisites and/or Advance Preparation:** Basic familiarity with formulas and functions

**Learning Objectives/Description:** Learn tips and tricks of how to create and use formulas and functions in creating reports, inquiries and processing transactions.

## Cost-Based Billing: JC, CN, BL & AR Lab - Part 1 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting staff responsible for the billing of cost-based invoices using the contracts and billing modules or those currently billing their T&M bills outside of Sage and looking to produce their bills more efficiently.

**Prerequisites and/or Advance Preparation:** Attendees should be familiar with structure of job cost cost codes and categories. A basic understanding of how to setup a contract and items in the contract module. Come with the knowledge of how you are currently generating your cost-based invoices whether doing them in Sage or Excel, etc. and how you want to improve your process so that you are prepared to ask questions!

**Learning Objectives/Description:** You will be able to complete the setup and workflow of a cost-based contract using the contract and billings modules. This will include interface settings, billing rates, markup tables, and add-on tables used with cost-based billing. Throughout the sessions, we will go through tips on how to migrate your current manual billing process into the Billing Module.

## Cost-Based Billing: JC, CN, BL & AR Lab - Part 2 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting staff responsible for the billing of cost-based invoices using the contracts and billing modules or those currently billing their T&M bills outside of Sage and looking to produce their bills more efficiently.

**Prerequisites and/or Advance Preparation:** Attendance in Cost-Based Billing: JC, CN, BL & AR Lab - Part 1 of 4. Attendees should be familiar with structure of job cost cost codes and categories. Attendees should be familiar with structure of job cost cost codes and categories. A basic understanding of how to setup a contract and items in the contract module. Come with the knowledge of how you are currently generating your cost-based invoices whether doing them in Sage or Excel, etc. and how you want to improve your process so that you are prepared to ask questions!

**Learning Objectives/Description:** You will be able to complete the setup and workflow of a cost-based contract using the contract and billings modules. This will include interface settings, billing rates, markup tables, and add-on tables used with cost-based billing. Throughout the sessions, we will go through tips on how to migrate your current manual billing process into the Billing Module.

## Cost-Based Billing: JC, CN, BL & AR Lab - Part 3 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting staff responsible for the billing of cost-based invoices using the contracts and billing modules or those currently billing their T&M bills outside of Sage and looking to produce their bills more efficiently.

**Prerequisites and/or Advance Preparation:** Attendance in Cost-Based Billing: JC, CN, BL & AR Lab - Parts 1 and 2 of 4. Attendees should be familiar with structure of job cost cost codes and categories. Attendees should be familiar with structure of job cost cost codes and categories. A basic understanding of how to setup a contract and items in the contract module. Come with the knowledge of how you are currently generating your cost-based invoices whether doing them in Sage or Excel, etc. and how you want to improve your process so that you are prepared to ask questions!

**Learning Objectives/Description:** You will be able to complete the setup and workflow of a cost-based contract using the contract and billings modules. This will include interface settings, billing rates, markup tables, and add-on tables used with cost-based billing. Throughout the sessions, we will go through tips on how to migrate your current manual billing process into the Billing Module.

#### AP Advanced: Credit Card System

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Users familiar with the Accounts Payable Application and those responsible for the their organization's credit card workflow.

**Prerequisites and/or Advance Preparation:** Familiarity with the basic use of the AP application.

**Learning Objectives/Description:** This hand-on lab session will walk you through the workflow of the credit card processing system within the Accounts Payable module.

#### Cost-Based Billing: JC, CN, BL & AR Lab - Part 4 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting staff responsible for the billing of cost-based invoices using the contracts and billing modules or those currently billing their T&M bills outside of Sage and looking to produce their bills more efficiently.

**Prerequisites and/or Advance Preparation:** Attendance in Cost-Based Billing: JC, CN, BL & AR Lab - Parts 1, 2, and 3 of 4. Attendees should be familiar with structure of job cost cost codes and categories. A basic understanding of how to setup a contract and items in the contract module. Come with the knowledge of how you are currently generating your cost-based invoices whether doing them in Sage or Excel, etc. and how you want to improve your process so that you are prepared to ask questions!

**Learning Objectives/Description:** You will be able to complete the setup and workflow of a cost-based contract using the contract and billings modules. This will include interface settings, billing rates, markup tables, and add-on tables used with cost-based billing. Throughout the sessions, we will go through tips on how to migrate your current manual billing process into the Billing Module.

#### JC Advanced Lab

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Users familiar with the Job Cost (JC) module

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hand-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, and how to import certain types of Job Cost transactions.

#### Quick Bill Invoicing

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning a fast and flexible way to create and print a billing invoice outside of the contract-based and cost-based billing methods.

**Prerequisites and/or Advance Preparation:** Basic knowledge of the Sage 300 CRE Billing module

**Learning Objectives/Description:** Learn how to create and print a unit-based, non-unit based and retainage billing invoice using the features of the Quick Bill task, including the use of standard items, rate table items, standard add-ons, percentage items, and manual items.

#### Advanced Desktop: Setting Up Configurations for Company Roles

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Sage administrators

**Prerequisites and/or Advance Preparation:** General knowledge of the Sage Desktop user interface

**Learning Objectives/Description:** Finding the tasks and reports to which users need access in order to fulfill their specific responsibilities can be challenging. We will be discussing options for customizing the Sage Desktop environment for the various roles within your organization so that users can be better informed and more productive. Some of the topics covered include: 1) Desktop customization, 2) configuration files, 3) creating your own role specific desktop configuration templates or locating and using pre-built templates that come with the software.

#### **Subcontractor Compliance: Lien Waivers & Secondary Vendors Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** AP and Admin Sage users who need to maintain records on Lien Waivers Compliance, record lower tier subs (secondary vendors) and who want to get reports from Sage or My Assistant to manage that task.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** We will set up Sage 300CRE to require and record Lien Waivers certificates and lower tier subs (secondary vendors) and we will look at the reports which show that information.

#### **Subcontractor Compliance: Insurance Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** AP and Admin Sage users who need to maintain records on insurance compliance and who want to get reports from Sage or My Assistant to manage that task.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** We will set up Sage 300CRE to require and record insurance certificates and misc. items related to insurance and we will look at the reports which show that information.

## *Track 08: Sage 300 CRE – Accounting Basics*

*Software Version: TBD*

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#### **Accounts Payable Basics Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users new to Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** After completing this hands-on lab, you will understand the fundamentals of the (AP) Accounts Payable module. You will have a basic understanding of the application interfaces, period-end methods, and common reports. You will know how to set up vendors and check forms, enter invoices, select invoices to pay, print checks, and record manual checks. You will understand how the simple customization to the invoice entry grid can make data entry easier and more meaningful.

#### **Sage 300 CRE Concepts for Accountants and Project Managers**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** New users to Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This session is intended to help navigate Sage 300 CRE products. Database structure will be explained as well as entering data into the system. Manual Entry as well as using Import files. As well as how to extract the information once in the system via reports and inquiries.

#### **Error Correction AP & CM**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Controllers, Accounting Managers, AP users, CM users

**Prerequisites and/or Advance Preparation:** Experience with AP, CM

**Learning Objectives/Description:** In this session, you will learn how to be able to correct issues that arise within AP & CM

### General Tips & Tricks for Sage 300 CRE

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** All users of the Sage 300 CRE software accounting modules

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Have you ever picked up a tip or trick that made life a little bit easier? This session will be full of tips and tricks for day-to-day use of Sage 300 CRE. Come see some of our favorites and bring your own to share with the group.

### Using Sage 300 CRE Desktop Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users new to Sage 300 CRE or new to desktop

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hands-on lab session will allow new Sage 300 CRE users to practice navigating Sage 300 CRE Desktop and 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 "Favorites" shortcuts and Job Overview reporting provided with Sage 300 CRE Desktop. We will show you how to configure the TUG Home Page report so that each Project Manager can see a list of their own jobs and access drill-down reports for each job using a simple browse-and-click interface. After completing this class, you will be able to setup your own desktop favorites and home page report and utilize desktop as your 'home base' to easily access information and shortcuts to reports and tasks.

### Accounts Receivables Basics Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users new to Sage 300 CRE or new to the Accounts Receivable (AR) module

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** 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 you may enable or disable specific settings. 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.

### Job Cost Basics

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users new to Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this hands-on lab session we will review job cost task, including overall JC settings, setting up Jobs, and the setup of Standard and Job Cost Codes and Categories. We will also review and look at entering job estimates and entering direct costs.

### General Ledger Basics Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users new to Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hands-on lab session will give users an understanding of the flow of data through the General Ledger module. Users will learn how to setup accounts; how to record, edit and delete entries; how to review and print reports from the General Ledger. We will also discuss setting up budgets and how to add and edit budget data. Imports will not be covered in this class.

#### Importing for AP, CM, GL, JC, PR, AR

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Controllers, Accounting Managers,

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this session, you will learn process to import successfully

#### Running Reports & Inquiries + ID & RD Basics

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All new users to Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This session is for new users of Sage 300 CRE software. Demonstrate how to access, modify, and Name standard reports and inquiries. Will discuss the types of reports--Report Design vs Crystal Reports. How to apply conditions to Report Design reports for a specific run and add permanent conditions to existing Report Design reports. How to modify Inquiries for temporary use and permanent modifications.

#### Error Correction AP & CM

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** All users of Sage 300 CRE tasked with correcting errors in AP and/or CM

**Prerequisites and/or Advance Preparation:** Familiarity with AP or CM

**Learning Objectives/Description:** This session will give you the fundamentals of error correction in the Accounts Payable and Cash Management modules. We will review common errors then review the detailed steps to make the corrections, so your reporting will be accurate.

#### Cash Management Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users new to Sage 300 CRE

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hands-on lab session will cover cash management setup through reconciliation. We will review the application capabilities and terminology as well as workflow processes. We will cover setting up bank accounts, importing cleared checks, reconciling the bank account, using the Edit Register and bank account transfers.

#### Wrap-Up Roundtable

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All conference attendees

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** You have taken in a great deal of information at the conference. This is an opportunity to debrief and share those new thoughts and ideas with your peers as well as ask any final questions that you have not yet gotten answered.

## Track 09: Sage 300 CRE – Crystal Reports

Software Version: Sage 300 CRE TBD, Crystal Reports 2013

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### Basic Crystal Lab - Part 1 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning how to retrieve and present their data in meaningful, action oriented ways.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** During this hands-on class you will be amazed at how easy it is to begin creating reports that present your data in meaningful ways. Throughout this day long course, you will gain a basic knowledge of building reports from scratch. This will include selecting the tables needed, the placement and formatting of fields on the report. In addition, you will learn how to filter your report so that it only shows that data that makes sense. last you will learn how to group your data into eye pleasing sections including sub and grand totals. Before the day is done, you'll even get an introduction to writing formulas and placing your finished reports on the Sage 300 reports menu.

### Basic Crystal Lab - Part 2 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning how to retrieve and present their data in meaningful, action oriented ways.

**Prerequisites and/or Advance Preparation:** Attendance in Basic Crystal Lab - Part 1

**Learning Objectives/Description:** During this hands-on class you will be amazed at how easy it is to begin creating reports that present your data in meaningful ways. Throughout this day long course, you will gain a basic knowledge of building reports from scratch. This will include selecting the tables needed, the placement and formatting of fields on the report. In addition, you will learn how to filter your report so that it only shows that data that makes sense. last you will learn how to group your data into eye pleasing sections including sub and grand totals. Before the day is done, you'll even get an introduction to writing formulas and placing your finished reports on the Sage 300 reports menu.

### Basic Crystal Lab - Part 3 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning how to retrieve and present their data in meaningful, action oriented ways.

**Prerequisites and/or Advance Preparation:** Attendance in Basic Crystal Lab – Parts 1 and 2

**Learning Objectives/Description:** During this hands-on class you will be amazed at how easy it is to begin creating reports that present your data in meaningful ways. Throughout this day long course, you will gain a basic knowledge of building reports from scratch. This will include selecting the tables needed, the placement and formatting of fields on the report. In addition, you will learn how to filter your report so that it only shows that data that makes sense. last you will learn how to group your data into eye pleasing sections including sub and grand totals. Before the day is done, you'll even get an introduction to writing formulas and placing your finished reports on the Sage 300 reports menu.

### Basic Crystal Lab - Part 4 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning how to retrieve and present their data in meaningful, action oriented ways.

**Prerequisites and/or Advance Preparation:** Attendance in Basic Crystal Lab – Parts 1, 2, and 3

**Learning Objectives/Description:** During this hands-on class you will be amazed at how easy it is to begin creating reports that present your data in meaningful ways. Throughout this day long course, you will gain a basic knowledge of building reports from scratch. This will include selecting the tables needed, the placement and formatting of fields on the report. In addition, you will learn how to filter your report so that it only shows that data that makes sense. last you will learn how to group your data into eye pleasing sections including sub and grand totals. Before the day is done, you'll even get an introduction to writing formulas and placing your finished reports on the Sage 300 reports menu.

### Crystal Reports: Intro to Formulas & Functions Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** You've been introduced to formulas in the beginner's course and perhaps worked with them for a while, now you are ready to go to the next level. This course is for you.

**Prerequisites and/or Advance Preparation:** Basic knowledge of Crystal Reports and previous experience with formulas whether that be in Excel, Report Designer or Crystal Reports.

**Learning Objectives/Description:** During this course we will delve into the most commonly used functions used in Sage 300 Crystal Reports. These functions when used properly in formulas can make building reports easier, faster and more powerful. That results in you building better reports with less effort.

### Crystal Reports: Intro to Formulas & Functions Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** You've been introduced to formulas in the beginner's course and perhaps worked with them for a while, now you are ready to go to the next level. This course is for you.

**Prerequisites and/or Advance Preparation:** Attendance in Crystal Reports: Intro to Formulas & Functions Lab - Part 1. Basic knowledge of Crystal Reports and previous experience with formulas whether that be in Excel, Report Designer or Crystal Reports.

**Learning Objectives/Description:** During this course we will delve into the most commonly used functions used in Sage 300 Crystal Reports. These functions when used properly in formulas can make building reports easier, faster and more powerful. That results in you building better reports with less effort.

### Intermediate Crystal Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** You've mastered the basics of Crystal Reports and now you want to go further. This class is perfect for you.

**Prerequisites and/or Advance Preparation:** A basic level of understanding for Crystal Reports

**Learning Objectives/Description:** In this fast paced ½ day course we will build on the skills you've previously mastered in the Intro class. We will delve into formulas in more detail unlocking the full potential of Crystal Reports. Beyond formulas we are going to discuss table linking in more detail than was provided in the Intro Class. We will finish off with an introduction to Subreports. Subreports are a key feature that elevates Crystal Reports above most other reporting tools. Leaving this course, you should feel empowered to master the presentation of your data like never before.

### Intermediate Crystal Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** You've mastered the basics of Crystal Reports and now you want to go further. This class is perfect for you.

**Prerequisites and/or Advance Preparation:** Attendance in Intermediate Crystal Lab - Part 1. A basic level of understanding for Crystal Reports

**Learning Objectives/Description:** In this fast paced ½ day course we will build on the skills you've previously mastered in the Intro class. We will delve into formulas in more detail unlocking the full potential of Crystal



Reports. Beyond formulas we are going to discuss table linking in more detail than was provided in the Intro Class. We will finish off with an introduction to Subreports. Subreports are a key feature that elevates Crystal Reports above most other reporting tools. Leaving this course, you should feel empowered to master the presentation of your data like never before.

### Crystal Reports: Intro to SQL Queries Lab – Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Everyone who wants to learn new ways to retrieve data from Sage.

**Prerequisites and/or Advance Preparation:** Basic Knowledge of Excel or Crystal

**Learning Objectives/Description:** In this two-session course, you will learn how to build a SQL statement and how to use a handful of powerful SQL functions. Through hands-on activities, you will create simple yet powerful queries and learn how to save them as SQL views for use later in products such as Excel, Access and Crystal to name just a few. With just a bit of SQL knowledge, you can begin to master the retrieval and presentation of your Sage data in ways you never thought possible.

### Crystal Reports: Intro to SQL Views Lab – Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Everyone who wants to learn new ways to retrieve data from Sage.

**Prerequisites and/or Advance Preparation:** Basic Knowledge of Excel or Crystal; Attendance in Crystal Reports: Intro to SQL Queries Lab – Part 1

**Learning Objectives/Description:** In part two of this two-part course, you will learn how to build a SQL statement and how to use a handful of powerful SQL functions. Through hands-on activities, you will create simple yet powerful queries and learn how to save them as SQL views for use later in products such as Excel, Access and Crystal to name just a few. With just a bit of SQL knowledge, you can begin to master the retrieval and presentation of your Sage data in ways you never thought possible.

### Using SQL Queries & Views with Crystal Reports & Excel Lab – Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to learn new and more power ways to retrieve their data from Sage and present it in new and better ways.

**Prerequisites and/or Advance Preparation:** Basic understanding of Crystal Reports and Microsoft Excel

**Learning Objectives/Description:** Have you ever wanted to take the power of Crystal Reports or Excel to the next level? This beginner course will teach you how to write basic SQL queries that can be used with both. In this two-session course, you will learn how to structure a SQL query and a handful of SQL functions. Through hands-on activities, you will create simple yet powerful queries and learn how to use them in Crystal and Excel to see and retrieve your data in ways you have never been able to before.

### Using SQL Queries & Views with Crystal Reports & Excel Lab – Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to learn new and more power ways to retrieve their data from Sage and present it in new and better ways.

**Prerequisites and/or Advance Preparation:** Attendance in Using SQL Queries & Views with Crystal Reports & Excel Lab – Part 1. Basic knowledge of Crystal Reports and Excel

**Learning Objectives/Description:** Second part of this two part course. Have you ever wanted to take the power of Crystal Reports or Excel to the next level? This beginner course will teach you how to write basic SQL queries that can be used with both. In this two-session course, you will learn how to structure a SQL query and a handful of SQL functions. Through hands-on activities, you will create simple yet powerful queries and learn how to use them in Crystal and Excel to see and retrieve your data in ways you have never been able to before.

### Modifying Canned Crystal Templates for PJ Reports Lab

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Completion of Basic Crystal Reports class. Familiarity with Sage Accounting and Project Management modules and workflow.

**Learning Objectives/Description:** This hands-on lab will go through the steps involved in managing custom report templates. We will review Tips & Tricks for updating PJ Reports and other common customizations. We will discuss the difference between the "(T)" and "non-(T)" versions of a template and how to build a master template to simplify editing.

### Using Crystal to Build a Job Overview Homepage for Sage Desktop Lab

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Completion of Basic Crystal Reports class. Familiarity with using the TUG Job Overview report in Sage Desktop.

**Learning Objectives/Description:** This hands-on lab will go through concepts used in the TUG Job Overview report template to allow drill-downs and linked sub reports, as well as Integration Formulas to be able to control which jobs are displayed based on who is logged into Sage.

## Track 10: Sage 300 CRE – MyAssistant

Software Version: TBD

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### Intro to MyAssistant (pre-requisite for other MyAssistant sessions)

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users of MyAssistant

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this introductory class we will review the various tabs found in MyAssistant. We will briefly step through each feature to give a broad overview of how the software works. You'll learn how to configure one of the built-in MyAssistant tasks, how to send it via email, and how to de-activate it. We will not be covering the actual installation and setup of MyAssistant in this class. That is an activity best handled by your Sage Consultant and/or your IT staff.

This is considered a pre-requisite class since we will be showing you how the software works. Please note that we will not be repeating these lessons in our other classes. If you are familiar with the workings of MyAssistant, this class is not required. But if you are a recent or new user of MyAssistant you will find this is an important class to attend before you take more advanced classes.

### MyAssistant Basic: Building a Notification from Scratch Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Senior Accountants, Controllers, CFOs

**Prerequisites and/or Advance Preparation:** Attendance in the Intro to MyAssistant session

**Learning Objectives/Description:** If you are new to MyAssistant and have taken the pre-requisite class, this is an excellent follow-up class. In this lab we will be a few simple MyAssistant Tasks from scratch. Through this process, you'll get a good understanding of how each piece of MyAssistant works together to give you great results. Some of the Notifications we will create are:

- Invoices over threshold
- Vendors missing a Recipient Tax ID
- Customers with a balance over \$10,000
- Employees with an Anniversary Date within next 14 days

### MyAssistant Intermediate: Building Advanced Notifications from Scratch Lab

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Senior Accountants, Controllers, CFOs

**Prerequisites and/or Advance Preparation:** Attendance in the Intro to MyAssistant session

**Learning Objectives/Description:** MyAssistant is a powerful tool. In the “Building a MyAssistant Notification from Scratch” class, we created some simple Notifications and Tasks. In this class, we will dig deeper into the functions and features of the software.

We will show you how to use more complex conditions to test for deeper data exceptions. With these conditions you can perform more if/then, date-based, and multiple-test tasks that give you specific results based on your needs. We will also show you how to send each Project Manager a report for their jobs.

In addition to the tasks we learn in class, this will help you develop concepts that will plant seeds in your mind for future tasks that you will develop on your own.

Some of the Notifications we will work on are:

- Cost Codes over Budget on labor dollars (Including unposted PR)
- Employee with the same Social Security Number
- Employees with time entered last week but not this week
- Costs entered for a job since the last report

### Using MyAssistant to Electronically Distribute Personalized Documents, Including PR Direct Deposit Statements

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** People who want to learn to automatically generate & send reports and documents filtered by recipient with MyAssistant; including employee pay statements, vendor letters, SM invoices and more.

**Prerequisites and/or Advance Preparation:** A general understanding of how MyAssistant can be used is helpful, but not required.

**Learning Objectives/Description:** Learn common MyAssistant alerts that send personalized content by recipient, as well as a framework to set up MyAssistant to send personalized reports and documents by recipient

### Using MyAssistant to Proactively Manage Projects with Easy-to-Consume Information

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** People who want to learn how to set up project alerts that can be automatically generated with MyAssistant.

**Prerequisites and/or Advance Preparation:** A general understanding of how MyAssistant can be used is helpful, but not required.

**Learning Objectives/Description:** Learn about common MyAssistant alerts for Project Management, as well as a framework to set up MyAssistant Tasks/Reports using Project Management examples

### Using MyAssistant for Vendor Compliance

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** People who want to learn how to set up vendor compliance alerts that can be automatically generated with MyAssistant.

**Prerequisites and/or Advance Preparation:** A general understanding of how MyAssistant can be used is helpful, but not required.

**Learning Objectives/Description:** Learn about common Vendor Compliance alerts in MyAssistant, as well as a framework to set up MyAssistant Tasks/Reports using Vendor Compliance examples.

#### Using MyAssistant for Generating AP and Job Cost Alerts Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** People who want to learn about setting up AP and Job Cost alerts in MyAssistant, and people who currently set up MyAssistant Tasks/reports.

**Prerequisites and/or Advance Preparation:** A general understanding of how MyAssistant can be used is helpful, but not required.

**Learning Objectives/Description:** Learn a framework for setting up MyAssistant Tasks/reports, as well as common AP and Job Cost alerts in MyAssistant.

#### Using MyAssistant to Verify Daily Processes Lab

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Controllers, CFOs, Owners

**Prerequisites and/or Advance Preparation:** Attendance in the Intro to MyAssistant session

**Learning Objectives/Description:** In this class, we will discuss several reports and concepts that allow you to use MyAssistant as a Controller, CFO, or Owner. While you won't be setting these reports up, we will give you printouts of the tasks that will allow you or your staff to set them up later.

Some of the processes we will review are:

- Invoices coded to a Summary Vendor in the past 7 days
- Random Invoice Review
- Invoices with the same date, amount, and vendor, but different Invoice Number
- Vendors with a Credit Memo not selected for payment
- Unposted Transactions

### *Track 11: Sage 300 CRE – ODBC*

*Software Version: TBD*

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#### Basic ODBC with Excel and Access Lecture- Part 1 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Accounting personnel looking to work with Sage 300 CRE data in Microsoft® Office. Learn how to read and report on data in Microsoft® Excel and how to write back select items into Sage 300 CRE using Microsoft® Access.

**Prerequisites and/or Advance Preparation:** Attendees should be familiar with Sage 300 CRE data structure and have a basic knowledge of Microsoft® Excel; exposure to Microsoft® Access a plus but not necessary.

**Learning Objectives/Description:** After completing this four-part series you will be able to create reports and graphs in Microsoft® Excel with Sage 300 CRE data and populate fields in Sage 300 CRE with direct input from Microsoft® Access. We'll start with basic ODBC concepts, and then progress through reporting and data manipulation. Learn to never retype data again using this powerful and dynamic tool.

#### Basic ODBC with Excel and Access Lab - Part 2 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Accounting personnel looking to work with Sage 300 CRE data in Microsoft® Office. Learn how to read and report on data in Microsoft® Excel and how to write back select items into Sage 300 CRE using Microsoft® Access.

**Prerequisites and/or Advance Preparation:** Attendance in Basic ODBC with Excel and Access Lab - Part 1 of 4. Attendees should be familiar with Sage 300 CRE data structure and have a basic knowledge of Microsoft® Excel; exposure to Microsoft® Access a plus but not necessary.

**Learning Objectives/Description:** After completing this four-part series you will be able to create reports and graphs in Microsoft® Excel with Sage 300 CRE data and populate fields in Sage 300 CRE with direct input from Microsoft® Access. We'll start with basic ODBC concepts, and then progress through reporting and data manipulation. Learn to never retype data again using this powerful and dynamic tool.

#### Basic ODBC with Excel and Access Lab - Part 3 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Accounting personnel looking to work with Sage 300 CRE data in Microsoft® Office. Learn how to read and report on data in Microsoft® Excel and how to write back select items into Sage 300 CRE using Microsoft® Access.

**Prerequisites and/or Advance Preparation:** Attendance in Basic ODBC with Excel and Access Lab - Parts 1 and 2 of 4. Attendees should be familiar with Sage 300 CRE data structure and have a basic knowledge of Microsoft® Excel; exposure to Microsoft® Access a plus but not necessary.

**Learning Objectives/Description:** After completing this four-part series you will be able to create reports and graphs in Microsoft® Excel with Sage 300 CRE data and populate fields in Sage 300 CRE with direct input from Microsoft® Access. We'll start with basic ODBC concepts, and then progress through reporting and data manipulation. Learn to never retype data again using this powerful and dynamic tool.

#### Basic ODBC with Excel and Access Lab - Part 4 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Accounting personnel looking to work with Sage 300 CRE data in Microsoft® Office. Learn how to read and report on data in Microsoft® Excel and how to write back select items into Sage 300 CRE using Microsoft® Access.

**Prerequisites and/or Advance Preparation:** Attendance in Basic ODBC with Excel and Access Lab - Parts 1, 2, and 3 of 4. Attendees should be familiar with Sage 300 CRE data structure and have a basic knowledge of Microsoft® Excel; exposure to Microsoft® Access a plus but not necessary.

**Learning Objectives/Description:** After completing this four-part series you will be able to create reports and graphs in Microsoft® Excel with Sage 300 CRE data and populate fields in Sage 300 CRE with direct input from Microsoft® Access. We'll start with basic ODBC concepts, and then progress through reporting and data manipulation. Learn to never retype data again using this powerful and dynamic tool.

#### Intermediate ODBC with Excel and Access Lab - Part 1 of 4

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** 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.

**Learning Objectives/Description:** 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.

#### Intermediate ODBC with Excel and Access Lab - Part 2 of 4

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in Intermediate ODBC with Excel and Access Lab - Part 1 of 4. 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.

**Learning Objectives/Description:** 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.

#### Intermediate ODBC with Excel and Access Lab - Part 3 of 4

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in Intermediate ODBC with Excel and Access Lab - Parts 1 and 2 of 4. 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.

**Learning Objectives/Description:** 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.

#### Intermediate ODBC with Excel and Access Lab - Part 4 of 4

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in Intermediate ODBC with Excel and Access Lab - Parts 1, 2, and 3 of 4. 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.

**Learning Objectives/Description:** 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.

#### Advanced ODBC with Excel Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Intermediate to Advanced Microsoft Excel users looking to sharpen their skills in an interactive lab environment. Learn and share program tips and tricks with fellow power Excel users. Note this lab will cover material previously presented in the Advanced Excel Tips and Tricks webinars.

**Prerequisites and/or Advance Preparation:** Attendees should have a working knowledge of Microsoft Excel and the ability to work with a wide range of Excel formulas and features. This class will include basic VBA and SQL examples.

**Learning Objectives/Description:** Learn a wide range of Excel tips and tricks including named ranges, structured formula references, templates, advanced functions, date and string manipulation, VBA snippets and writing custom functions. This will be a highly interactive two-part lab, so bring your best ideas and tips to share with the class.

#### Advanced ODBC with Excel Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Intermediate to Advanced Microsoft Excel users looking to sharpen their skills in an interactive lab environment. Learn and share program tips and tricks with fellow power Excel users. Note this lab will cover material previously presented in the Advanced Excel Tips and Tricks webinars.

**Prerequisites and/or Advance Preparation:** Attendance in Advanced ODBC with Excel Lab - Part 1 of 2. Attendees should have a working knowledge of Microsoft Excel and the ability to work with a wide range of Excel formulas and features. This class will include basic VBA and SQL examples.

**Learning Objectives/Description:** Learn a wide range of Excel tips and tricks including named ranges, structured formula references, templates, advanced functions, date and string manipulation, VBA snippets and writing custom functions. This will be a highly interactive two-part lab, so bring your best ideas and tips to share with the class.

### WIP & Forecasting with ODBC Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendees of this session should be familiar with using ODBC and familiar with WIP reporting.

**Learning Objectives/Description:** 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.

### WIP & Forecasting with ODBC Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in WIP & Forecasting with ODBC Lab - Part 1 of 2. Attendees of this session should be familiar with using ODBC and familiar with WIP reporting.

**Learning Objectives/Description:** 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.

### Advanced ODBC with SQL Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning basic SQL concepts for reporting and queries.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Power-up your reports and ODBC solutions using custom SQL queries. This hands-on, two-part session will start with the basics of a SQL Query statement and build into more complex concepts such as, joining tables, multi-database queries, parameters, subqueries, etc. The SQL language is used to interact with databases from many front-end programs, so knowing the basics will turn you into a power user!

### Advanced ODBC with SQL Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone interested in learning basic SQL concepts for reporting and queries.

**Prerequisites and/or Advance Preparation:** Attendance in Advanced ODBC with SQL Lab - Part 1 of 2

**Learning Objectives/Description:** Power-up your reports and ODBC solutions using custom SQL queries. This hands-on, two-part session will start with the basics of a SQL Query statement and build into more complex concepts such as, joining tables, multi-database queries, parameters, subqueries, etc. The SQL language is used to interact with databases from many front-end programs, so knowing the basics will turn you into a power user!

## Track 12: Sage 300 CRE – Office Connector

Software Version: TBD

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### Using Office Connector Starter Reports & Intro to Office Connector Query Lab

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users interested in using Office Connector Starter Reports and/or Office Connector Query in order to eliminate the double entry that occurs when entering Sage data into Excel.

**Prerequisites and/or Advance Preparation:** Attendees of this session should have a basic understanding of the Sage 300 CRE structure and workflow.

**Learning Objectives/Description:** This hands-on lab session will get you started with Office Connector Starter, including how to access and use the free reports included with your system. You will 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.

### Office Connector Financial Functions Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** General Ledger Accountants Needing to Produce Financial Statements

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn how to use and customize pre-built Office Connector Financial Statement reports, and also build your own financial statements from a new, empty Excel Workbook.

### Office Connector Financial Functions Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** General Ledger Accountants Needing to Produce Financial Statements

**Prerequisites and/or Advance Preparation:** Attendance in OC Financial Functions Lab - Part 1 of 2

**Learning Objectives/Description:** Learn how to use and customize pre-built Office Connector Financial Statement reports, and also build your own from a new, empty Excel Workbook.

### Office Connector Write & Import Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendees of this session should be familiar with basic Sage 300 CRE structure and workflow

**Learning Objectives/Description:** 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.

### Office Connector Write & Import Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in OC Write & Import Lab - Part 1 of 2. Attendees of this session should be familiar with basic Sage 300 CRE structure and workflow



**Learning Objectives/Description:** 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.

#### Office Connector Managing Commitments Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Users of Sage 300 CRE Accounting/Project Management software who want to improve Commitment Management tracking and reporting by using Sage 300 CRE Office Connector.

**Prerequisites and/or Advance Preparation:** Attendees of this session should be familiar with using Sage 300 CRE Office Connector and Commitment Management Process in Sage 300 CRE

**Learning Objectives/Description:** This hands-on class will walk through the steps needed to build a Commitment Management dashboard using Sage 300 CRE Office Connector, that will be ready for use upon your return to your workplace after the conference.

#### Office Connector Managing Commitments Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Users of Sage 300 CRE Accounting/Project Management software who want to improve Commitment Management tracking and reporting by using Sage 300 CRE Office Connector.

**Prerequisites and/or Advance Preparation:** NOTE: This is the second part of a two-part lab that builds on what was completed in Part 1. Attendees of this session should be familiar with using Sage 300 CRE Office Connector and Commitment Management Process in Sage 300 CRE.

**Learning Objectives/Description:** This hands-on class will walk through the steps needed to build a Commitment Management dashboard using Sage 300 CRE Office Connector, that will be ready for use upon your return to your workplace after the conference.

#### Intermediate/Advanced Office Connector Concepts Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Sage 300 CRE users who want to develop Office Connector reports or modify templates provided with the OC software

**Prerequisites and/or Advance Preparation:** Previous exposure to working with OC report and tools such as Query wizard.

**Learning Objectives/Description:** Learn how to build reports with Office Connector Wizards, then take them to the next level, modifying SQL and recording Macros.

#### Intermediate/Advanced Office Connector Concepts Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Sage 300 CRE users who want to develop Office Connector reports or modify templates provided with the OC software

**Prerequisites and/or Advance Preparation:** Previous exposure to working with OC report and tools such as Query wizard. Attendance in Intermediate/Advanced OC Concepts Lab - Part 1 of 2

**Learning Objectives/Description:** Learn how to build reports with Office Connector Wizards, then take them to the next level, modifying SQL and recording Macros.

## Track 13: Sage 300 CRE – Payroll

Software Version: TBD

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### Payroll Issues & Solutions: Discussion with Q&A

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who uses the Payroll application

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** 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

### Using Formulas in Payroll

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Payroll users responsible for setting up pays, deducts, and fringes.

**Prerequisites and/or Advance Preparation:** A basic understanding of how to setup pays, deducts, and fringes.

**Learning Objectives/Description:** In this session, we will review the setup of accrual and other complex formulas such as 401K and HSA Match, PTO, Sick, and Vacation accruals, garnishment calculation, and how to add a vacation available formula to the paystubs.

### Payroll: Certified & Union Payroll

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Accounting staff responsible for the entering of payroll time, setup of employees, and printing and verification of certified payroll and/or union reports

**Prerequisites and/or Advance Preparation:** 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.

**Learning Objectives/Description:** 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. Discussion of LCP Tracker. Q & A, time permitting, on union payroll.

### Multi-State Payroll Setup & Issues

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Employers who are multi state employers or may become multi state employers, and want more information on how to set this up in Payroll.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this session, we will review the setup and processing with multi state payroll.

### Canadian Payroll Tips & Tricks

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Canadian Payroll Users or Payroll Users interested in Canadian Payroll and the differences.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Become more knowledgeable with Canadian Payroll.

### Payroll Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users New to the Payroll Application or Users who'd like to refresh their knowledge.

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hands-on lab session will cover employee set up and payroll tasks, including:

- Review Payroll Settings
- Modify Time Entry Views
- Set up Pay Rate Tables
- Payroll Processes
- Enter Time
- Process Payroll
- Generate Direct Deposits and Print Checks
- Void Checks
- Useful Inquiries and Reports

### Payroll Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users New to the Payroll Application or Users who'd like to refresh their knowledge.

**Prerequisites and/or Advance Preparation:** Attendance in Payroll Lab Part 1 of 2

**Learning Objectives/Description:** This hands-on lab session will cover employee set up and payroll tasks, including:

- Review Payroll Settings
- Modify Time Entry Views
- Set up Pay Rate Tables
- Payroll Processes
- Enter Time
- Process Payroll
- Generate Direct Deposits and Print Checks
- Void Checks
- Useful Inquiries and Reports

## *Track 14: Sage 300 CRE – Project Management Advanced*

*Software Version: TBD*

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### How to Financially Manage Different Owners Requirements Using Sage 300 Roundtable

**CPE Credits:** 1.5

**Knowledge 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

**Prerequisites and/or Advance Preparation:** Attendees of this session should be familiar with Sage 300 CRE job Costing, PJ Change Management and Contracts & Billing.

**Learning Objectives/Description:** This class will be an interactive discussion focused on identifying issues and different strategies for managing different owner financial requirements – from Cost Plus to Stipulated Sum to combinations. We will discuss different real-world scenarios and how you can approach managing financials differently when your owner has various constraints in order to make the project successful. Bring your own success stories!

### PJ Forecasting Theories

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendees of this session should be familiar with Sage 300 CRE job costing, commitments and PJ Change Management workflow

**Learning Objectives/Description:** 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.

### **PJ Advanced Change Management for Job Financials Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendees of this session should be familiar with PJ Change Management workflow and data entry screens as well as Job Cost financials workflow and data entry screens.

**Learning Objectives/Description:** This 2-part hands-on lab session will cover advanced aspects of the PJ Change Management system relating to Estimates and Commitments. We will review the details of various real-world scenarios such as internal changes, back-charges, and managing buyouts & busts.

### **PJ Advanced Change Management for Job Financials Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in PJ Advanced Change Management for Job Financials Lab - Part 1 of 2. Attendees of this session should be familiar with PJ Change Management workflow and data entry screens as well as Job Cost financials workflow and data entry screens.

**Learning Objectives/Description:** This 2nd-session will continue to build on the tasks began in Part 1 and will cover advanced aspects of the PJ Change Management system relating to Estimates and Commitments. We will review the details of various real-world scenarios such as internal changes, back-charges, and managing buyouts & busts.

### **PJ Advanced Change Management: Contracts & Billing Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** 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.

**Learning Objectives/Description:** This 2-part hands-on lab session will cover advanced aspects of the PJ Change Management system relating to Owner Changes and managing your schedule of values line items, as well as Owner Contingencies, Allowances, and reimbursables.

### **PJ Advanced Change Management: Contracts & Billing Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in PJ Advanced Change Management: Contracts & Billing Lab - Part 1 of 2. 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.

**Learning Objectives/Description:** This 2nd-session will continue to build on the tasks began in Part 1 and will cover advanced aspects of the PJ Change Management system relating to Owner Changes and managing your schedule of values line items, as well as Owner Contingencies, Allowances, and reimbursables.

## *Track 15: Sage 300 CRE – Project Management Basics*

*Software Version: TBD*

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### **PJ Using Job Overview Homepage for Sage Desktop Lab**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All PJ Project Management users not already using a Job Overview Home page

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This hands-on lab session will go through the detailed steps to load project management shortcuts into the “Favorites” bar and activate the TUG Job Overview Home Page report to view all open jobs. We will also look at setting up jobs in PJ and in JC to review how those jobs show up in the Job Overview Home Page. Attendees will be able to take a copy of the TUG project management configuration file and TUG Job Overview Crystal Template, so after completing this class, you can setup your Sage Desktop at your home office.

### **PJ Address Book and Document Tools Overview Lecture - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendees of this session should be familiar with construction project management techniques, and basic Sage 300 CRE structure and workflow

**Learning Objectives/Description:** This lecture session will focus concepts related to managing Company and Person contacts in the Sage Address Book, setting up Job Contact Lists, and using PJ Document Tools such as RFIs and Submittals.

### **PJ Address Book and Document Tools Overview Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** New users to the Project Management (PJ) Documents - project managers, project coordinators, and project assistants or anyone responsible for the documenting or reviewing the job progression.

**Prerequisites and/or Advance Preparation:** Attendance in PJ Address Book and Document Tools Lecture - Part 1 of 2

**Learning Objectives/Description:** This hands-on lab session will go through detailed steps of the topics discussed in the lecture of Part 1.

### **PJ Job Financials: Cost Estimate and Commitments Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic / Intermediate

**Who Should Attend:** All Users of the Sage 300 CRE 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 and/or Advance Preparation:** Attendees of this session should be familiar with construction project management techniques, basic Sage 300 CRE structure and workflow

**Learning Objectives/Description:** This 2-part session discuss steps for entering an Estimate, then proceed with the detailed steps for entering a Commitment (Purchase Order or Subcontract). We will highlight the options available during commitment entry that may affect subcontractor compliance (lien waivers, insurance, etc).

### **PJ Job Financials: Cost Estimate and Commitments Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic / Intermediate

**Who Should Attend:** All Users of the Sage 300 CRE 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 and/or Advance Preparation:** Attendance in PJ Job Financials: Cost Estimate and Commitments Lab - Part 1 of 2. Attendees of this session should be familiar with construction project management techniques, basic Sage 300 CRE structure and workflow

**Learning Objectives/Description:** This 2nd-session will continue to build on the tasks began in Part 1.

### **PJ Basic Change Management Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic / Intermediate

**Who Should Attend:** All Users of the Sage 300 CRE 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 and/or Advance Preparation:** Attendees of this session should be familiar with construction project management techniques, basic Sage 300 CRE structure and workflow

**Learning Objectives/Description:** This 2-part hands on lab session will cover all basic aspects of the PJ Change Management system. We will first review workflow, then cover the step-by-step tasks involved in entering a potential change as the Change Request, documenting an approved owner Change Order to update contract amounts for billing, and issuing Commitment Change Orders to subs or suppliers to update job cost estimates and commitment amounts. Along the way, we will discuss setup steps as well as defaults and prefills.

### **PJ Basic Change Management Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic / Intermediate

**Who Should Attend:** All Users of the Sage 300 CRE 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 and/or Advance Preparation:** Attendance in PJ Basic Change Management Lab - Part 1 of 2.

**Learning Objectives/Description:** This 2nd-session will continue to build on the tasks began in Part 1.

### **PJ Online Collaboration Roundtable**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Project Managers, Project Assistants and Project Coordinators who track and/or share project-related information in online systems.

**Prerequisites and/or Advance Preparation:** Familiarity with Sage Project Management workflow and tools

**Learning Objectives/Description:** In addition to Sage Construction Project Center (SCPC) and Procore, there are a variety of 3rd party tools and platforms for collecting, tracking, and/or sharing project-related information online. This roundtable session will be an interactive discussion about the pros and cons of the various systems in use, so bring your suggestions and your questions!

### **PJ Project Life Cycle - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic / Intermediate

**Who Should Attend:** All Users of the Sage 300 CRE Project Management (PJ) module - project managers, project coordinators, and project accountants.

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

**Learning Objectives/Description:** This session will recap the features of the Project Management module you have reviewed over the past few days, by incorporating them into an entire project life cycle from start to finish

#### **PJ Project Life Cycle - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Basic / Intermediate

**Who Should Attend:** All Users of the Sage 300 CRE Project Management (PJ) module - project managers, project coordinators, and project accountants.

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

**Learning Objectives/Description:** The discussion will continue from where we left off in Part 1.

### *Track 16: Sage 300 CRE – Report Designer, Inquiry Designer, Financial Statements Software Version: TBD*

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#### **Intermediate Report Designer Lab - Part 1 of 4**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Completion of Basic Report Designer training, working knowledge of basic report designs, and basic understanding of Sage 300 CRE data structure.

**Learning Objectives/Description:** Write reports in the Sage 300 CRE Report Designer Module using formulas and functions. Also review existing reports and learn how to analyze the reports to determine where the data comes from and how to modify the reports.

#### **Intermediate Report Designer Lab - Part 2 of 4**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in Session 1 of 4 in Intermediate Report Designer Lab. Completion of Basic Report Designer training, working knowledge of basic report designs, and basic understanding of Sage 300 CRE data structure.

**Learning Objectives/Description:** Write reports in the Sage 300 CRE Report Designer Module using formulas and functions. Also review existing reports and learn how to analyze the reports to determine where the data comes from and how to modify the reports.

#### **Intermediate Report Designer Lab - Part 3 of 4**

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in Sessions 1 and 2 of 4 in Intermediate Report Designer Lab. Completion of Basic Report Designer training, working knowledge of basic report designs, and basic understanding of Sage 300 CRE data structure.

**Learning Objectives/Description:** Write reports in the Sage 300 CRE Report Designer Module using formulas and functions. Also review existing reports and learn how to analyze the reports to determine where the data comes from and how to modify the reports.

#### Intermediate Report Designer Lab - Part 4 of 4

**CPE Credits:** 1.5

**Knowledge 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 and/or Advance Preparation:** Attendance in Sessions 1 through 3 of 4 in Intermediate Report Designer Lab. Completion of Basic Report Designer training, working knowledge of basic report designs, and basic understanding of Sage 300 CRE data structure.

**Learning Objectives/Description:** Write reports in the Sage 300 CRE Report Designer Module using formulas and functions. Also review existing reports and learn how to analyze the reports to determine where the data comes from and how to modify the reports.

#### Inquiry Designer Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users responsible for creating/editing inquiries

**Prerequisites and/or Advance Preparation:** No previous experience necessary. Note that the Inquiry Designer module is required to create and save changed inquiries.

**Learning Objectives/Description:** Part 1 of 2 - This session will start with an overview of what is an "Inquiry". It will cover the basic framework of inquiries including inquiry files, record relationships, views and jumps. We will then create a basic Accounts Payable inquiry from scratch.

#### Inquiry Designer Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users responsible for creating/editing inquiries

**Prerequisites and/or Advance Preparation:** Attendance in Inquiry Designer Lab - Part 1 of 2. No previous experience necessary. Note that the Inquiry Designer module is required to create and save changed inquiries.

**Learning Objectives/Description:** Part 2 of 2 - This session will continue on using the inquiry we created from scratch in part 1. We will add jumps, column specific jumps, and add formulas and conditions to our inquiry. We will wrap up with a few tips and tricks for using and creating inquiries.

#### Basic Report Designer Lab - Part 1 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**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 and/or Advance Preparation:** None - familiarity with running reports is helpful but not necessary. Understanding of Sage 300 CRE data structure is also helpful.

**Learning Objectives/Description:** Learn how 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.

#### Basic Report Designer Lab - Part 2 of 4



**CPE Credits:** 1.5

**Knowledge Level:** Basic

**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 and/or Advance Preparation:** Attendance in Session 1 of 4 in Basic Report Designer Lab. Familiarity with running reports is helpful but not necessary. Understanding of Sage 300 CRE data structure is also helpful.

**Learning Objectives/Description:** Learn how 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.

#### Basic Report Designer Lab - Part 3 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**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 and/or Advance Preparation:** Attendance in Sessions 1 and 2 of 4 in Basic Report Designer Lab. Familiarity with running reports is helpful but not necessary. Understanding of Sage 300 CRE data structure is also helpful.

**Learning Objectives/Description:** Learn how 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.

#### Financial Statement Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users new or have some experience to the Financial Statement Designer (FS) module - Controllers, accounting managers and accountants preparing financial statements

**Prerequisites and/or Advance Preparation:** Attendees should understand the accounting principles used in creation of an income statement and balance sheet

**Learning Objectives/Description:** This hands-on lab session will teach you the “hows” and “whys” of Financial Statement Designer, including the GL fields available to FS, formatting tools and methods of design. After completing this class, you will be able to prepare income statements and balance sheets in FS.

#### Basic Report Designer Lab - Part 4 of 4

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**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 and/or Advance Preparation:** Attendance in Sessions 1 through 3 of 4 in Basic Report Designer Lab. Familiarity with running reports is helpful but not necessary. Understanding of Sage 300 CRE data structure is also helpful.

**Learning Objectives/Description:** Learn how 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.

#### Financial Statement Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Users new and have some experience to the Financial Statement Designer (FS) module - Controllers, accounting managers and accountants preparing financial statements

**Prerequisites and/or Advance Preparation:** Attendance in Financial Statement Lab - Part 1 of 2. Must attend Financial Statement Lab Part 1 of 2 since this class continue with exercises from Part 1.

**Learning Objectives/Description:** This hands-on lab session will teach you additional ways to use the Financial Statement Designer for budget comparisons, percentage variances, monthly forecasting and cash flow.

## *Track 17: Sage 300 CRE – Specialty Modules*

*Software Version: TBD*

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### SSO Set Up and New Features

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users of Sage 300 CRE who own or have interest in the SM Module or SSO

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this session, learn about essential setup for Sage Service Operations and some of the more recent features introduced in Sage Service Operations. After participating in this session, you'll be able to:

- Identify setup options that could enhance or change the way you process information.
- Describe the latest features in Sage Service Operations.

### SSO/SFO Common Workflows

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** All users of Sage 300 CRE who own or have interest in the SM Module

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Take this opportunity to see how easy it is to use Sage Service and Field Operations in the field. Watch as your instructor shows you how to create a user, enter a work order, provide work order details for billing, and generate a daily field report. Review the effects on back-office accounting along the way. After you participate in this session, you'll be able to:

- Create a new user.
- Generate a work order and input details for billing purposes.
- Create a project daily field report.
- Identify where the information you enter in SSO is found in your back office.

### Purchase Orders and Inventory for Service Management

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** All users of Sage 300 CRE who own or have interest in the SM module

**Prerequisites and/or Advance Preparation:** Familiarity with SM

**Learning Objectives/Description:** In this session, learn about essential purchase order and inventory tasks for Service Management. After a short review of parts and how the information is used, learn how to enter purchase orders for a work order and for inventory. Next, see how to receive and manage the items. Then, create vendor invoices for the purchase order. After you purchase and receive parts, explore inventory tasks, including stock transfers, physical counts, and on-hand quantity adjustments.

After participating in this session, you will be able to:

- Generate purchase orders for work order items and inventory.
- Establish a standard stock list you can associate with a location and generate a restocking list for items to meet the standard stock list requirements.
- Perform tasks such as transfer, physical counts, and adjust on-hand quantities by location.

### Agreements and PM Tasks in Service Management Lab

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** All users of Sage 300 CRE who use or are interested in SM module

**Prerequisites and/or Advance Preparation:** Familiarity with SM

**Learning Objectives/Description:** Participate in this session to learn how agreements are tracked in Service Management. We'll cover how to set up the agreement billings and review equipment preventive maintenance work schedules. We will also cover modifications and renewals to agreements.

After participating in this session, you will be able to:

- Understand how the agreement type affects agreement processing.
- Create a new agreement for a customer.
- Explain the different agreement billing options.
- Describe how the amortization works.
- Generate invoices for agreements.
- Create a preventive maintenance schedule for equipment.

### Service Management Work Order Billing

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** All users of Sage 300 CRE who own or has interest in the SM module

**Prerequisites and/or Advance Preparation:** Familiarity with SM Work Orders

**Learning Objectives/Description:** How do you bill customers for completed work? Explore the different ways to bill work orders and generate invoices. You can use work order billing to generate multiple invoices or create individual invoices. You can even change the grouping of work orders to bill single work orders or combine them by service location or customer. Learn how to use invoice formats to create more customized invoices for a customer. Oops – didn't mean to invoice that work order? Find out how to fix it!

After participating in this session, you will be able to:

- Generate invoices for individual or multiple work orders based on the work completed.
- Preview the invoices you are about to generate.
- Close work orders to protect against additional entry.
- Utilize invoice formats for improved reporting to unique customers.

## Track 18: Sage Estimating

Software Version: Sage Estimating 21.1

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### Estimating Fundamentals Workshop Lecture - Part 1 of 3

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Estimators

**Prerequisites and/or Advance Preparation:** Before beginning this session, you should know how to perform basic takeoff and edit items in your estimate or database.

**Learning Objectives/Description:** In this three-session interactive lecture/lab series we 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. You'll discover what reports are available in SAGE Estimating SQL. You'll be able to understand what the Management Console is and how you can use it to manage your Estimate files and more.

### Database Setup/Editor/Management Workshop Lecture - Part 1 of 3

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate to Advanced

**Who Should Attend:** Intermediate and Advanced users who manage the Estimating database or who want to standardize the database

**Prerequisites and/or Advance Preparation:** Basic understanding of the Estimating Database

**Learning Objectives/Description:** 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 the database 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. If time is available, we will also explore creating assemblies and the formulas that are needed to make them function correctly.

### Estimating Fundamentals Workshop Lab - Part 2 of 3

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Estimators

**Prerequisites and/or Advance Preparation:** Attendance in session Estimating Fundamentals Workshop Lecture (1 of 3); Before beginning this session, you should know how to perform basic takeoff and edit items in your estimate or database.

**Learning Objectives/Description:** In this three-session interactive lecture/lab series we 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. You'll discover what reports are available in SAGE Estimating SQL. You'll be able to understand what the Management Console is and how you can use it to manage your Estimate files and more.

### Database Setup/Editor/Management Workshop Lab - Part 2 of 3

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate to Advanced

**Who Should Attend:** Intermediate and Advanced users who manage the Estimating database or who want to standardize the database

**Prerequisites and/or Advance Preparation:** Attendance in session Database Setup/Editor/Management Workshop Lecture (1 of 3); Basic understanding of the Estimating Database

**Learning Objectives/Description:** 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 the database 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. If time is available, we will also explore creating assemblies and the formulas that are needed to make them function correctly.

### Estimating Fundamentals Workshop Lab - Part 3 of 3

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Estimators

**Prerequisites and/or Advance Preparation:** Attendance in session 07-01 Estimating Fundamentals Workshop Lecture (1 of 3) and session 07-02 Estimating Fundamentals Workshop Lab (2 of 3); Before beginning this session, you should know how to perform basic takeoff and edit items in your estimate or database.

**Learning Objectives/Description:** In this three-session interactive lecture/lab series we 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. You'll discover what reports are available in SAGE Estimating SQL. You'll be able to understand what the Management Console is and how you can use it to manage your Estimate files and more.

### Database Setup/Editor/Management Workshop Lab - Part 3 of 3

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate to Advanced

**Who Should Attend:** Intermediate and Advanced users who manage the Estimating database or who want to standardize the database

**Prerequisites and/or Advance Preparation:** Attendance in session Database Setup/ Database Editor/Management Workshop Lecture (1 of 3) and session Database Setup/Editor/Management Workshop Lab (2 of 3); Basic understanding of the Estimating Database

**Learning Objectives/Description:** 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 the database 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. If time is available, we will also explore creating assemblies and the formulas that are needed to make them function correctly.

### eTakeoff with Bridge Lecture - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** Anyone who is currently using, or interested in implementing, an integrated digital takeoff solution.

**Prerequisites and/or Advance Preparation:** Attendees should understand the basic workflow of quantity takeoff, estimate creation, item and assembly input

**Learning Objectives/Description:** Attendees will come away from this session with an overall understanding of how eTakeoff Dimension & Bridge work together with Sage Estimating to provide an efficient integrated process. Topics will include an overview of the eTakeoff products and explanation on how prepare your estimating database and assemblies for efficient use of the eTakeoff Bridge; including the revolutionary SnapAI functionality.

### SQL Server Management Studio (SSMS) Basics

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Anyone who wants to know more about SQL Server. This is a beginner's class and great introduction to MS SQL.

**Prerequisites and/or Advance Preparation:** Bring your "out-of-the-box" thinking cap and an open mind.

**Learning Objectives/Description:** SQL Server Management Studio (SSMS) is a robust tool created by Microsoft to manage and query data in a SQL database. In this course, we will discuss the basics of database management, break down the sections of the SSMS screen, see examples of how and why to use each section, along with tips and tricks to make it all easier. If you are interested in learning about SQL, whether you use Sage 100, 300, or estimating, this is a great introduction and first step.

### eTakeoff with Bridge Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** Anyone who is currently using, or interested in implementing, an integrated digital takeoff solution.

**Prerequisites and/or Advance Preparation:** Attendance in session eTakeoff with Bridge Lecture (1 of 2); Attendees should understand the basic workflow of quantity takeoff, estimate creation, item and assembly input. Familiarity with Smart Assemblies in Sage Estimating would be of value, but is not required.

**Learning Objectives/Description:** This lab will build on the topics discussed during the previous lecture, allowing users the chance to get a better feel for how eTakeoff Dimension & Bridge work together with Sage Estimating. Activities will include creating Traces in eTakeoff from existing Sage Estimating Assemblies, mapping takeoff to assemblies in Sage Estimating, using the Trace Utility and the new SnapAI functionality.

### Using SQL Server Management Studio (SSMS) to Manage your Sage Estimating Data Lecture - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Advanced/Expert

**Who Should Attend:** Estimating power users and database administrators

**Prerequisites and/or Advance Preparation:** Knowledge with SQL Server Management Studio (SSMS)

**Learning Objectives/Description:** While the new Sage Estimating environment has brought the data structure into the modern MS SQL era, the ability to perform traditional data manipulation via the Timberline ODBC driver is no longer available. This session will cover the use of SQL Server Management Studio (SSMS) to perform equivalent tasks within the new data platform. Using a combination of SQL scripts and data import routines within SSMS, you will be able to execute data transfer tasks with confidence.

### Estimating Tips & Tricks - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic to Advanced

**Who Should Attend:** Estimators and others wishing to expand their knowledge of the use of the estimating software

**Prerequisites and/or Advance Preparation:** A working knowledge of Sage Estimating

**Learning Objectives/Description:** 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.

### Using SQL Server Management Studio (SSMS) to Manage your Sage Estimating data Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Advanced/Expert

**Who Should Attend:** Estimating power users and database administrators

**Prerequisites and/or Advance Preparation:** Attendance in session Using SQL Server Management Studio (SSMS) to Manage Your Sage Estimating Data Lecture (1 of 2); Knowledge with SQL Server Management Studio (SSMS)

**Learning Objectives/Description:** While the new Sage Estimating environment has brought the data structure into the modern MS SQL era, the ability to perform traditional data manipulation via the Timberline ODBC driver is no longer available. This session will cover the use of SQL Server Management Studio (SSMS) to perform equivalent tasks within the new data platform. Using a combination of SQL scripts and data import routines within SSMS, you will be able to execute data transfer tasks with confidence.

### Estimating Tips & Tricks - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic to Advanced

**Who Should Attend:** Estimators and others wishing to expand their knowledge of the use of the estimating software

**Prerequisites and/or Advance Preparation:** Attendance in session Estimating Tips & Tricks (1 of 2); A working knowledge of Sage Estimating

**Learning Objectives/Description:** 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.

### **BIM 101 Lecture - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Estimators, Estimating Managers, Project Managers

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** 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.

### **Estimating to Job Cost: Sage 100 Contractor and Sage 300 CRE Lecture**

**CPE Credits:** 1.5

**Knowledge 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)

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** The integration within Sage Estimating can automate the creation of Budgets, Proposals and Change Orders in Sage 100 Contractor and Budgets in Sage 300 CRE. In this session we will go through the setup and workflow to accomplish the integration between the Estimating and accounting products.

### **BIM 201 - Integrated Solutions with Sage Estimating Lab - Part 2 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Estimators, Estimating Database Managers, Project Managers

**Prerequisites and/or Advance Preparation:** Attendance in session BIM 101 Lecture (1 of 2); Attendees should understand the basic workflow of quantity takeoff, estimate creation, item and assembly input; a basic understanding of BIM is also helpful.

**Learning Objectives/Description:** This lab session will provide you with the understanding of how to utilize the Navisworks eTakeoff Bridge plug-in to perform quantity takeoff; and be able to integrate the calculated quantities into Sage Estimating. The integration of Assemble Systems will be a demonstration only. Discussions on other BIM Estimating Integrations will also be encouraged.

### **Formulas & Assemblies Lecture**

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** Estimators or database administrators - who develop, modify or improve their company's Sage Estimating Database

**Prerequisites and/or Advance Preparation:** Before beginning this session, you should be familiar with your database setup and know how to perform basic takeoff

**Learning Objectives/Description:** 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. With the knowledge gained on variables, formulas, formula tables and functions, you will then learn how to build your own assemblies.

### **Models Estimating Lab - Part 1 of 2**

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate/Advanced

**Who Should Attend:** Estimating power users and database administrators

**Prerequisites and/or Advance Preparation:** Experience using Quick, Item and Assembly Takeoff; Basic familiarity with building database formulas and assemblies

**Learning Objectives/Description:** 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. 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

### Formulas & Assemblies Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** Estimators or database administrators - who develop, modify or improve their company's Sage Estimating Database

**Prerequisites and/or Advance Preparation:** Attendance in prior lecture(s) on Formulas and Assemblies (sessions Formulas & Assemblies Lecture and Formulas and Assemblies Lab (1 of 2)

**Learning Objectives/Description:** In this hands-on session, you will apply the concepts learned in the lecture to build formulas, variables, and formula tables that will assist you in creating your own assemblies.

### Models Estimating Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate/Advanced

**Who Should Attend:** Estimating power users and database administrators

**Prerequisites and/or Advance Preparation:** Attendance in session Models Estimating Lab (1 of 2); Experience using Quick, Item and Assembly Takeoff; Basic familiarity with building database formulas and assemblies

**Learning Objectives/Description:** 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. 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

### Formulas & Assemblies Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Basic/Intermediate

**Who Should Attend:** Estimators or database administrators - who develop, modify or improve their company's Sage Estimating Database

**Prerequisites and/or Advance Preparation:** Attendance in prior lecture(s) on Formulas and Assemblies (sessions Formulas & Assemblies Lecture and Formulas and Assemblies Lab (1 of 2)

**Learning Objectives/Description:** In this hands-on session, you will apply the concepts learned in the lecture to build formulas, variables, and formula tables that will assist you in creating your own assemblies.

### Power BI for Estimating

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate to Advanced



**Who Should Attend:** Estimating report writers who want to publish estimating data in a easy to use format for owners and other staff. You should have a basic understanding of databases.

**Prerequisites and/or Advance Preparation:** Understanding SQL and Database structure

**Learning Objectives/Description:** Power BI is a powerful tool that allows you to create and embed reports for fast easy access to all of your estimating information. With this Microsoft tool you can easily share estimating information with company owners and other staff members to know exactly where you are at with not only specific estimates but your overall estimating department allowing for greater control on your resources. This tool isn't just for SAGE SQL Estimating but you can also link in Excel documents as well which we will cover on a basic level.

### Resources, Crews, & Rate Tables, Totals Page, Sequences & Layouts and Canned Reporting Lecture

**CPE Credits:** 1.5

**Knowledge Level:** Intermediate

**Who Should Attend:** Estimators and estimating database administrators

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** We will cover how to work with totals page templates, sort sequences, estimating spreadsheet templates, saved report layouts and use these with your estimates. We will also discuss setting up resources, crews and rate tables.

### Exporting Sage SQL Estimating data to MS Office via External Tools Lab - Part 1 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Advanced/Expert

**Who Should Attend:** Estimating power users and database administrators

**Prerequisites and/or Advance Preparation:** Experience with building estimating database

**Learning Objectives/Description:** Sage SQL Estimating provides a connection point called External Tools which enables the launching of other applications without leaving the software. Using a blend of command line parameters, Microsoft VBA code and SQL connection scrips, this session will demonstrate creative ways to export your currently open Sage SQL Estimating content directly to your own Microsoft Excel and Word templates.

### Sage Estimating: Bring Your Own Questions

**Knowledge Level:** Basic

**Who Should Attend:** Anyone with questions on the Sage Estimating software

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Bring those Estimating questions to this session and let out Sage Estimating experts help you solve them. Join us for this free form question and answer session covering any of the Sage 300 Estimating products

### Exporting Sage SQL Estimating data to MS Office via External Tools Lab - Part 2 of 2

**CPE Credits:** 1.5

**Knowledge Level:** Advanced/Expert

**Who Should Attend:** Estimating power users and database administrators

**Prerequisites and/or Advance Preparation:** Attendance in session Exporting Sage SQL Estimating Data to MS Office via External Tools Lab (1 of 2); Experience with building estimating database

**Learning Objectives/Description:** Sage SQL Estimating provides a connection point called External Tools which enables the launching of other applications without leaving the software. Using a blend of command line parameters, Microsoft VBA code and SQL connection scrips, this session will demonstrate creative ways to export your currently open Sage SQL Estimating content directly to your own Microsoft Excel and Word templates.

## Track 19: Sage Software

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### Intro to Sage Intacct Construction

**Presenter:** Dennis Stejskal

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE, Sage Estimating

**Learning Objectives/Description:** As you plan your journey to the cloud, learn about the Sage Intacct Construction product and its overall feature set - current and future! If you're a service contractor or developer, check out the other 2 Sage Intacct Construction sessions in the Sage track to learn about plans to address the needs of those subverticals.

#### Improving your Sage CRE solution with Sage Partner Cloud

**Presenter:** Jeremiah McNicolas, Bob Hollander of SwizzNet

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE, Sage Estimating

**Learning Objectives/Description:** Find out what makes Swizznet unique and how to leverage their technology and expertise for a stellar Sage experience in the cloud.

#### Estimating Roadmap

**Presenter:** Darren Pierce, Mark Peltz

**Relevant Software Products:** Sage Estimating

**Learning Objectives/Description:** Join us for this session to learn and give input about changes to the Estimating, eTakeoff and Buyout modules!

#### GCPay – Extending Accounts Payables from your Sage CRE Accounting Solution

**Presenter:** Leann Leon, Danny Brunelli

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE

**Learning Objectives/Description:** Learn more about how to get the most out of Sage 300 CRE or Sage 100 Contractor by extending your ability to process payments with your subcontractors, exchange lien waivers and manage compliance documentation such as insurance documents, payroll, etc. With its full integration with both Sage solutions, GCPay takes the time and arduous processes out of managing the payment application process that so often bogs down Accounting teams.

#### Sage ToolOps powered by ToolWatch – Reduce the Time and Expense of Managing Tools

**Presenter:** Leann Leon, Kolby Lathrup

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE

**Learning Objectives/Description:** Learn how Sage ToolOps creates instant visibility and accountability into tools, equipment and consumables. Sage ToolOps is a flexible, cloud-based solution that will enable you to increase field productivity by ensuring field personnel have what they need, when they need it and in working order.

#### Sage Intacct Construction for the Service Contractor

**Presenter:** Jay Ivy, Will Ivy, Dennis Stejskal

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE

**Learning Objectives/Description:** This future-focused session will orient you to plans to extend Sage Intacct Construction to meet the needs of the service contractor. We'll focus on service, subcontractors, and payroll.

#### Sage Intacct Construction for the Developer

**Presenter:** Dom Pernai, Dennis Stejskal

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE

**Learning Objectives/Description:** This future-focused session will orient you to plans to extend Sage Intacct Construction to meet the needs of the developer. We'll focus on how to use Sage Intacct Construction with entities, lease management, and features designed to address the unique needs of developers.

#### Making the Most of Your Sage and TUG Resources

**Presenter:** Sage CS Manager, Judi Magnuson of Sage, Molly Phillips, Jon Banse

**Knowledge Level:** All

**Who Should Attend:** All TUG Members and Potential TUG Members

**Prerequisites and/or Advance Preparation:** None Required

**Learning Objectives/Description:** Come find out how to make the most of the many benefits TUG offers

### What's New in Sage Paperless Construction

**Presenter:** Vincent Pate

**Relevant Software Products:** Sage 100 Contractor, Sage 300 CRE

**Learning Objectives/Description:** Learn about recent functionality added to Sage Paperless Construction since the last TUG conference. With additional AP workflows and searchability, Sage Paperless Construction is primed to address all of your accounts payable invoice needs. If you're new to Sage Paperless Construction, attend this session to see how to automate your company's AP invoices.

### Everything You Didn't Know About Sage Construction Project Center

**Presenter:** Leann Leon, Brian Anson

**Relevant Software Products:** Sage 300 CRE

**Learning Objectives/Description:** Sage Construction Project Center has evolved beyond its full service project/cost and document control offering to now include powerful AI and Collaboration tools. Come see our added features and future developments which will make work seamless across your computer, Web and Mobile devices.

### Liberty Reports for Sage 100 Contractor General Concepts - Part 1 of 2

**Presenter:** Alan Katt

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Sage 100 Contractor Users who want to learn about Developing Liberty Reports in Excel

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn Basic Liberty Reports Concepts, Excel based report development strategies, review key reports provided with the software which highlight its power and ease of use in preparation for actual report development in Part 2 of the class.

### Designing Liberty Reports for Sage 100 Contractor Lab - Part 2 of 2

**Presenter:** Alan Katt

**CPE Credits:** 1.5

**Knowledge Level:** Basic

**Who Should Attend:** Sage 100 Contractor Users who want to learn about Developing Liberty Reports in Excel

**Prerequisites and/or Advance Preparation:** Attendance in session Liberty Reports for Sage 100 Contractor General Concepts - Part 1 of 2; None

**Learning Objectives/Description:** This hands-on lab session will get you started with Sage Liberty Reports for Sage 100 Contractor. You will see the ease of transferring Sage 100 Contractor data into a user-friendly Excel format. True User Interaction is developed using the LRKeep feature to keep entries by the user correctly in place. You will also learn how to integrate powerful Excel features into these reports, such as Drop-Down Lists and Subtotals.

## Track 20: Vendor Sessions

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### Managing Construction Materials and Assets - Presented by Intelliwave Technologies

**Presenter:** Dale Beard of Intelliwave Technologies

**Knowledge Level:** Any

**Who Should Attend:** Sage 300 CRE users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this session learn about the importance of standardized processes for the management and control of construction materials and assets including purchasing, shipments, receiving, warehouse storage, preservation, project/field request, issuance out, installation and ongoing equipment/asset

maintenance. Watch a live demo of how all of this works in practice when using the SiteSense software adapter with Sage 300 CRE.

### **Release of Payments – Connected Simplicity is Here - Presented by Core Associates, an AvidXchange company**

**Presenter:** Mike Carbino

**Knowledge Level:** All levels

**Who Should Attend:** AP/Accounting/Finance professionals; Sage 300 Construction and Real Estate Users; Sage 100 Contractor Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In this session, we'll cover payment processing best practices including electronic payment methodology, record consolidation, and security measures. From PCI compliance to being audit-ready, release of payments shouldn't be a stressful activity. The AvidXchange team will highlight solutions that make release of payment a feel-good-moment for AP professionals, much like laying that final brick!

### **Transform Your Finance Team with Financial Intelligence - Presented by Phocas Software**

**Presenter:** Christine Martin of Phocas Software

**Knowledge Level:** All

**Who Should Attend:** Any

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** In today's business environment, organizations need the flexibility to adjust their metrics to adapt to current market conditions — not spending time looking in different places to get basic reports on the status of business operations.

See how modern finance leaders are transforming their departments to react more quickly to uncertainty and provide teams with the financial data they need to make stronger data-driven decisions for your distribution business.

Find out how live user-friendly analytics and dashboards for Sage make monthly reporting, the sharing of financial KPIs and budgeting and forecasting a whole lot easier including:

- ways to automate, consolidate and simplify month-end reporting
- how to empower managers with the information they need to perform
- analyze easier a centralized source of timely and accurate financial data
- how finance data can be less siloed while still being strictly governed
- ways to advance your budgeting and forecasting process with more dynamic and user-friendly approach

### **Access Your Sage Data More Effectively with Business Intelligence (BI) - Presented by Aktion Associates**

**Presenter:** Steve Handly, Aktion VP of the Construction Division

**Knowledge Level:** Any

**Who Should Attend:** Anyone

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn how using a business intelligence tool versus a generic excel file can help you streamline your processes and provide you with real-time, role-based information enabling data driven decisions. Aktion Analytics for Construction offers a best-in-class data analytics tool. Built specifically for Sage, users can quickly access key data from any web browser from any location. Join Steve Handly, Aktion VP of the Construction Division, for this informative discussion on the effectiveness of business intelligence.

### **The What, Why, and How of Construction Business Intelligence and Analytics - Presented by ATX Advisory Services**

**Knowledge Level:** Basic, Intermediate

**Who Should Attend:** Owners, Financial & Operations Leaders

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Forecasting, BI & Analytics, Implementation Tips and Best Practices

### Next Gen IT Support for the Construction Industry: How to Prevent Costly Downtime - Presented by Aktion Associates

**Presenter:**

**Knowledge Level:** Any

**Who Should Attend:** Anyone

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Aktion has been working with Sage and the construction industry for over 25 years and has created next-gen service offerings to help meet your business challenges. Specializing in helping companies grow their cloud adoption with Aktion's next-gen WAN optimization (SD-WAN), Cloud Security, Microsoft 365 deployment and support for Teams, SharePoint and OneDrive. We've also developed a range of industry-specific Managed Services and Sage Application Support programs, designed to mitigate risk for your operation by providing comprehensive support for your most important technology.

This session will focus on security, management, patching, monitoring, backup and disaster recovery, high availability, user education, cyber security insurance audits, strategic IT consulting and asset management.

### Leveraging Live Field Data for Ultimate Payroll & Accounting Accuracy

**Presenter:** Mike Merrill, co-founder, AboutTime Technologies

**Who Should Attend:** Sage 100 Contractor and Sage 300 CRE Accountants / Controllers / CFO / Payroll / Consultants / Owners

**Learning Objectives/Description:** Tired of cutting out of cycle payroll checks? Frustrated with manual reallocations and inaccurate work in progress reports for billing and invoicing? Are your P & L's off due to delayed or inaccurate data from the field? Are your balance sheets out of balance because tools and equipment are constantly changing hands, lost, or even stolen? Find out how you can use a mobile workforce platform to collect live field data that integrates directly with Sage 300 CRE or Sage 100 Contractor to track time, production, and equipment for the ultimate solution for accounting accuracy. In this session, learn how collecting live field data drastically increases accuracy with:

- 3 flexible options for time and labor entry and allocation workflows
- Robust pay codes to meet your unique needs
- Flexible OT configurations for simple and complex payrolls
- Permission Profiles to limit and control what employees see
- Face Recognition and GPS to eliminate time theft, buddy-punching and ghost employees.
- Mobile-to-Mobile device Tool and Equipment Transfers
- Live production data syncing with budget

### The AP Manager's Dream Come True – Easy Purchase-to-Pay Tech - Presented by Core Associates, an AvidXchange company

**Presenter:** Mike Carbino & Lee Ann Osganian

**Knowledge Level:** All levels

**Who Should Attend:** AP/Accounting/Finance/IT professionals; Sage 300 Construction and Real Estate Users; Sage 100 Contractor Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Trusted by thousands of users, TimberScan, from Core Associates an AvidXchange company, features new connectivity you've got to see to believe. Never touch a single sheet of paper with solutions that let you automatically code invoices, process expense reports, manage timesheets, and make payments— all while staying fully connected to Sage and Procore. See AvidSuite for Construction in action.

### Maximize Your Sage Investment with Fast, Flexible, and Secure Excel-Based Reporting - Presented by insightsoftware

**Presenter:** Brian Basden, Solutions Engineer - insightsoftware

**Knowledge Level:** Basic

**Who Should Attend:** Sage 300 CRE and Sage 100 Contractor users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Business leaders need to be connected to live data to make decisions quickly. However, many finance teams still find themselves in a never-ending cycle of data dumps, manual reconciliations, and waiting on IT to build reports. In this session, we will explore: how to get fast, Excel-based reporting with your Sage 300 CRE and Sage 100 Contractor data, eliminate reporting delays by creating flexible, accurate reports, and how to quickly access the data you need with simplified reporting across multiple accounts.

### Effectively Manage Time Entry for Your Entire Construction Company - Presented by hh2 Cloud Services

**Presenters:** Kevin Hadley & Britton Bauer

**Knowledge Level:** Basic

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** hh2 Remote Payroll, built from the ground up to efficiently manage construction time entry, offers multiple ways to submit time. Each department within your organization can choose the most effective manner to code time and pay employees. Breeze through approvals with custom approval paths that contain many approval types, permissions, and an unlimited number of approvers. hh2 makes time entry mobile by offering native apps for iOS and Android. You can also use hh2's full-featured website. Join our session to learn how your employees can enter, code, and approve time from anywhere, at any time, on any device.

### Going Paper Free with AP: Issues and Solutions Panel - Part 1 of 2

**Knowledge Level:** Basic

**Who Should Attend:** Prospective and Current Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This is a two-part session beginning with a panel of TUG users discussing their paper free solutions and their A/P processing procedures. Then there will be short demonstrations (multiple) from some paper free solution providers that have a solution for A/P processing and other issues. After the demonstrations, we will have a wrap up with Q & A.

### Going Paper Free with AP: Issues and Solutions Panel - Part 2 of 2

**Knowledge Level:** Basic

**Who Should Attend:** Prospective and Current Users

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** This is a two-part session beginning with a panel of TUG users discussing their paper free solutions and their A/P processing procedures. Then there will be short demonstrations (multiple) from some paper free solution providers that have a solution for A/P processing and other issues. After the demonstrations, we will have a wrap up with Q & A.

### Cloud AP featuring TimberScan Titanium - Presented by Core Associates, an AvidXchange company

**Session Leader:** Lee Ann Osganian

**Knowledge Level:** All levels

**Who Should Attend:** AP/Accounting/Finance/IT professionals; Sage 100 Contractor and Sage Intacct Users

**Prerequisites and/or Advance Preparation:**

**Learning Objectives/Description:** If you need flexibility, mobility, and simplicity in your AP management, TimberScan Titanium will brighten your day. Take a tour of the latest tech featuring full purchase-to-pay automation that keeps you connected to your Sage 100 Contractor or Sage Intacct system. In this session you'll see how to execute touch-free invoice coding, AP invoice approvals, and payments— from anywhere.

### 5 Hidden Safety Costs - Presented by HammerTech

**Presenter:** Ron Babich

**Knowledge Level:** Any

**Who Should Attend:** Users of Sage 100 Contractor, Sage 300 CRE, Sage Estimating

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Project financial stakeholders continue to be unaware of the hidden costs of safety costs affecting the bottom line.

Others miss the opportunity to harness historical safety reporting of near miss reporting, incidents, and injuries to reduce their insurance costs or to build more precise bids, estimates and schedules.

With the average direct cost of safety injuries around \$60,000, savvy financial professionals are leveraging new technology with predictive indicators to avoid the expense of injuries.

In this session, hear from 20 year project veteran Ron Babich, CRO of HammerTech, to learn more about how an integrated safety platform helps you to:

- Reduce insurance premiums by 15% to 35% with proven safety metrics
- Cut project costs by up to 32% with global visibility into safety's impact on the schedule
- Eliminate overpayment to trade partners by reconciling worker hours vs. invoices
- Lower Safety Incidents by 61% with up-to-date certification and license tracking
- Automate induction training with testing to start projects 51% faster

### **Cloud Hosting Designed for Sage Users - Presented by Aktion Associates**

**Presenter:**

**Knowledge Level:** Any

**Who Should Attend:** Anyone

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** The unexpected events of 2020 showed many businesses that working from home can successfully be a more significant part of the modern work experience. Whether you are a Sage 100 Contractor, Sage 300 CRE, Sage Estimating, or Sage Intacct user you need to be able to access your business-critical data at the office, home or even on the go. Find out why Aktion, a 27 year Sage Partner who understands your software and your industry challenges, is best suited to help you take your existing ERP to the cloud.

This session will discuss how your business can be best prepared for digital transformation and how to take advantage of the best of both the private and public clouds.

### **AP Routing & Approval Now with Payment Application Management - Presented by hh2 Cloud Services**

**Presenters:** Kevin Hadley & Britton Bauer

**Knowledge Level:** Basic

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** hh2 Document Flow continually adds features to an already robust solution. Document Flow enables you to easily code, route, and approve invoices, credit card transactions, and reimbursements. hh2 Cloud Services is pleased to introduce brand new features that control applications for payment, supporting documents, and compliance. You or your vendors can now create a schedule of values from any commitment. You can update dollar amounts, percentages complete, or materials stored as part of submitting payment applications. In addition, use hh2 Document Flow to manage supporting documentation and compliance. Verify job completion numbers while tracking certifications, insurance, and other required compliance documentation. Join our session to learn about hh2 Document Flow's latest features for any AP routing and approval solution.

## *General Sessions*

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**Tuesday, October 26 | 8:00am – 8:45am**

**General Session: Sage Keynote - Your Journey to the Cloud**

**Presenters: Dustin Stephens & Dennis Stejskal**

Learn more about our Sage strategy to empower your business with cloud technology. We'll focus on the different paths available to take your business to the cloud including considerations about when and why.

### [Wednesday, October 27 | 8:00am – 8:45am](#)

**Keynote:** Disconnect to Connect: Becoming a Connected Leader Who Creates an Engaged Company Culture During Times of Change

**Presenter:** Amy Vetter - CPA, Yogi & Technologist

**CPE Credits:** 1.0

### [Thursday, October 28 | 8:00am – 8:45am](#)

**General Session:**

**General Session Description:**

## *Featured Vendor Lunch Sessions*

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### [Tuesday, October 26 | 1:00pm – 1:30pm](#)

[WIP it good – Automate your processes and get to the truth faster in Sage - Presented by Prophix](#)

**Presenter:**

**Knowledge Level:** Basic

**Who Should Attend:**

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Now that 2021 is almost over, there are lessons learned from the last year that shouldn't be forgotten just because we're back to a "new normal". We were reminded why it's so critical to have complete project oversight in order to quickly adjust plans, make better use of resources or expectations in an instant. Learn how Prophix Software integrates with your Sage construction data for centralized data and the ability to model all aspects of your business with a single version of truth. Forecast Cash, Analyze Bids, Manage Equipment Rates, run WIP Reports and more with automation.

### [Wednesday, October 27 | 1:00pm – 1:30pm](#)

[Hosting Your SAGE CRE in the Cloud - Presented by Swizznet](#)

**Presenter:** Sam Schumacher – Swizznet Director of Product Development

**Knowledge Level:** All levels

**Who Should Attend:** Anyone considering cloud hosting

**Prerequisites and/or Advance Preparation:** None

**Learning Objectives/Description:** Learn the benefits of hosting your SAGE software in the cloud:

- Anytime, anywhere access
- Use the desktop features and apps with no new training
- Make changes and scale up as your business grows
- No more server purchases – you're out of the IT business
- Enterprise grade security including CrowdStrike threat protection

Watch a quick demonstration and see how easy it is to work in the cloud.

### [Thursday, October 28 | 1:00pm – 1:30pm](#)

[Less Data Entry, More Beer Drinking: The Abridged Introduction to Field and Office Connectivity – Presented by Ryvit](#)

**Presenters:** Tammy Alexander (Channel Executive) & Tom Stemm (CEO/Founder)

**Knowledge Level:** Intermediate

**Who Should Attend:** Controllers, Finance VPs, CFOs, CHROs, HR VPs, Site Foremen, IT Directors, CIOs, and the like

**Sage software type:** Sage 100 Contractor & Sage 300 CRE

**Prerequisites and/or Advance Preparation:**

**Learning Objectives/Description:** Get an introduction to Ryvit's integration solutions for Sage. Ryvit's iPaaS allows everyone on your team to use the systems and tools they prefer, while eliminating the need for manual data entry. Make faster decisions, be more informed, and complete projects more quickly and safely with our network of top-rated partners. Also, beer.



Learning objectives:

- Understanding the Opportunity Cost of Manual Data Entry
- Getting a Pulse on what Other Attendees are doing
- How to Move Data Confidently with One Hand on a Koozie