SESSION DESCRIPTIONS

2023 TUG National Users Conference

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

Updated 5/11/2023
General Sessions

**Tuesday, May 16 | 8:00am – 8:50 am**

**General Session: Sage Keynote**

**Presenters:** Dustin Stephens, Vice President, Sage CRE, and Julie Adams, Vice President of Product

Join Sage executives to hear about Sage’s strategy to enable customers with the power of choice to adopt the right combination of solutions at the right time. With Sage, customers can meet new challenges and seize opportunities to grow by working smarter and more efficiently while maximizing the value of their existing technology investments.

**Thursday, May 18 | 8:00am – 8:45am**

**TUG Annual Meeting & Prize Drawings – Sponsored by AvidXchange**

Hear all about how the 2022-2023 year went for TUG and don’t miss the introduction of the 2023-2024 Board of Directors. Prize drawings from TUG and our 3rd party vendors will also be held – don’t miss out as you must be present to win!

Featured Vendor Lunch Sessions

**Tuesday, May 16 | 1:00pm – 1:30pm**

**Featured Lunch Session: What Can HCSS Do for You?**

**Presenter:** Jeff Beseda, HCSS

**Knowledge Level:** Basic

**Who Should Attend:** Everyone

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

**Learning Objectives/Description:** How HCSS can supercharge your Sage Systems

**Wednesday, May 17 | 1:00pm – 1:30pm**

**Featured Lunch Session: The Future of AP Beyond Purchase to Pay – Presented by AvidXchange**

**Presenter:** Mark Carbino, Senior Product Director

**Knowledge Level:** Basic

**Who Should Attend:** Any attendee interested in creating efficiencies in AP

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

**Learning Objectives/Description:** You may have heard that AvidSuite for Construction’s TimberScan and TimberScan Titanium offer automation throughout the complete purchase-to-pay cycle, but what’s next? Join AvidXchange Senior Product Director, Mike Carbino, to learn about the latest trends in AP technology, including advanced purchasing, OCR automation, and credit card reconciliation.

**Thursday, May 18 | 1:00pm – 1:30pm**

**Featured Lunch Session: Goodbye Payment Holds: How to Create Flawless Pay Apps and Get Paid Faster with Siteline + Sage**

**Presenter:** Claire Wilson, Head of Customers at Siteline

**Knowledge Level:** Basic

**Who Should Attend:** Accounting teams (including leadership and executives) at commercial trade contractors

**Prerequisites and/or Advance Preparation:** N/A

**Learning Objectives/Description:** The billing process in construction is notoriously stressful and can put a strain on the relationship between trade contractors and general contractors. The onus is on the subcontractor to submit all of the required paperwork in order to get paid for completed work. As a subcontractor, you spend hours poring over emails, playing phone tag with your field team, and collecting lien waivers, but somehow, at least one payment application always gets rejected or your payment is put on hold. But, delayed payment can soon be a
thing of the past—and the team at Siteline is going to show you how. In this lunch-and-learn session, you'll learn how to:

- Improve processes to ensure first-time pay app acceptance and on-time payment
- Leverage Siteline to gain efficiencies across the billing process (including lien waivers and CIOs)
- Supercharge your Sage 100 or 300 instance with Siteline's integrated solution and visual reporting

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

*Software Versions: Sage 300 CRE and Sage 100 Contractor*

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

*Knowledge Level: Intermediate*

*Who Should Attend:* Anyone with specific Sage 300 CRE and/or Sage 100 Contractor 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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**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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**One-on-One Booth: Sage 300 CRE**

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*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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**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.

One-on-One Booth: Sage 300 CRE & Sage 100 Contractor
Knowledge Level: Intermediate
Who Should Attend: Anyone with specific Sage 300 CRE and/or Sage 100 Contractor 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.

Track 02: Industry Issues

Basic Processes and Procedures – AP/AR Roundtable – What Stupid Things do you do at Your Company?
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Anyone involved in Accounts Payable or Receivable processes and workflow.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: How often do you review your AP/AR workflow processes? Do you continue to do things the same way because “that’s the way we have always done it”? Join us for this interactive roundtable to discuss some of the basic processes/procedures for AP and AR. Bring your workflow issues to brainstorm with the group and be prepared to help others with solutions to their challenges.
What stupid things do you do at your company?

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.

Bridging Workforce Generational Gaps Roundtable
CPE Credits: 1.5
Knowledge Level: All
Who Should Attend: Anyone
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: We have all heard of the Baby Boomer’s, but Generation X, Z? Millennials? And what does that have to do with anything? Especially construction!! Generational shared values and experiences shape education, marketing strategies, purchasing, work styles, voting preferences, social service needs, entertainment choices, music and more. The span of generations across the workforce leads to interesting discussions of how we all interact with each other. Sometimes understanding the values of the different generations allows us to be more productive. Join this panel led, open discussion about generational differences, understanding them and the uniqueness it brings to the workplace.
Insurance Roundtable  
CPE Credits: 1.5  
Knowledge Level: Basic  
Who Should Attend: Anyone who deals with Insurance coverage  
Prerequisites and/or Advance Preparation: None  
Learning Objectives/Description: This session will be a Roundtable/Panel discussion regarding the ins and outs of insurance policy coverage. We will discuss types/kinds of insurance, insurance certificates, endorsements, additional insureds, coverage for a general contractor or subcontractor and things to be aware of and concerned with. The session will not have ALL the answers but will give you a lot of provoking thoughts and questions. Join us for an hour and half insurance learning experience.

The Path to Your CCIFP Designation – Presented by CFMA  
CPE Credits: 1.5  
Knowledge Level: Intermediate/Advanced  
Who Should Attend: Those in the construction finance profession either as a general contractor or accounting firm.  
Prerequisites and/or Advance Preparation: None. Should have some experience in the field of construction finance and be interested in pursuing CCIFP Certification.  
Learning Objectives/Description: What are the benefits of certification? Do you meet the eligibility requirements? What is the best way to prepare? What is required to maintain my certification? The answers to these questions and more will be answered during this session. Learn firsthand from your peers about the certification process and how achieving the industry’s only accredited certification for construction financial professionals enhances your individual career as well as practice development for CPA firms.  
Learning Objectives  
- Learn exam eligibility requirements, the application process, and certification maintenance.  
- Review the revised topic areas that are now included on the exam.  
- Identify exam preparation resources.  
- Locate the most convenient test center.  
- Learn about the requirements for you to take the next step in your career.

Don’t Be a BURDEN – Understanding Payroll Burden Roundtable  
CPE Credits: 1.5  
Knowledge Level: Basic  
Who Should Attend: Payroll Specialist, Job Cost Project Admins, Controllers, Accountants  
Prerequisites and/or Advance Preparation: Some knowledge of payroll and payroll burden would be helpful.  
Learning Objectives/Description: Join us for a lively conversation on what makes up Payroll Burden as well a discussing when to utilize all or only some of these items. Also, what are the parameters that decide how much burden to send to job cost.

Current Industry Issues Roundtable (Safety, Productivity)  
CPE Credits: 1.5  
Knowledge Level: Basic  
Who Should Attend: General Contractors and/or Subcontractors  
Prerequisites and/or Advance Preparation: None  
Learning Objectives/Description: This session will be a Roundtable/panel/attendee discussion regarding productivity and safety in the Construction Industry. We’ll discuss how some companies are being proactive in order to produce their product in this market and what companies are doing to promote safe workplaces. Some of the topics on the agenda will be how escalating costs are affecting productivity and how the labor shortage has had an impact on safety and security. Come join us to see how others in the industry are tackling these issues. How to be productive, safe, assertive and still get your job done.
Current Industry Issues Roundtable (Material & Labor Shortages)
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: General Contractors and/or Subcontractors
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: This session will be a Roundtable/Panel discussion about some current issues in the Construction Industry and how some are companies are being proactive and trying to mitigate exposure. Topics that will be on the agenda in this session are material shortages, escalating costs & labor shortages. Come join us to see how others in the industry are tackling these issues. Shortages everywhere! All of us have experienced material and labor shortages in the past year. Join us at the Roundtable to discuss how you have overcome some struggles and hear how others are making magic happen in their companies.

WIP Reporting & Forecasting Roundtable
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.

Business Issues – Lack of Planning/Cash Flow/Profit Margins/Technology Roundtable
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Everyone
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Planning is important for all businesses, especially those in capital intensive industries like construction and development. In this roundtable, we’ll discuss how users manage their cashflow, monitor their profitability and plan their operations. We’ll also discuss ways technology can be used to produce and analyze these key metrics.

CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Anyone who makes recommendations for Company Third-Party Software
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: So many of us have said something like, “There has to be a better way to do this!” or “Haven’t they invented a way to solve this problem yet?!” Then we start looking at 3rd Party software options to help. Sometimes the choices can be overwhelming! How do you know what questions to ask? How do you know when it is time to make the leap? Join us for a frank conversation of what has gone well in the process and what you wish you had known. Whether you have tried out a software and are now a raving fan or found out it wasn’t a good fit, or maybe you are just starting on the journey – there is something for all of us!

Hiring & Retention Strategies: Finding/Onboarding/Training/Retaining Employees Roundtable
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Managers and Owners
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: How other companies recruiting personnel? Does your company have high turnover and trouble retaining competent personnel? In the 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 recruit and what can help in retaining competent personnel. Hiring the right people and training them properly are the most effective ways to ensure the success of your company. Building successful teams is not easy, and the competition for highly skilled loyal workers is more challenging now. In this Roundtable session, let’s share what’s working (or NOT working) for our companies.

**Cleaning House: File Organization and Archiving Roundtable**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Sage users who are responsible for closing and archiving
- **Prerequisites and/or Advance Preparation:** None
- **Learning Objectives/Description:** Files, files everywhere ...which ones to keep?!? Join just for a discussion of basic file organization and management, digital verses paper, file locations, archiving and destruction requirements. What wins have you found? What questions do you have? How do you limit access to older files? And how do you fit it in to your annual task list?

**Surviving Audits Roundtable**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone who has responsibility for Sales & Use Tax
- **Prerequisites and/or Advance Preparation:** Understanding of Accounting and Job Costing
- **Learning Objectives/Description:** Knock Knock, Auditors Calling! Ways in which sage can help you survive the dreaded audit and what we have learned in process changing after going through one.

**Track 03: Computer & Software Users**

**Basics SQL Querying Lab – Part 1 of 2**
- **CPE Credits:** 1.5
- **Knowledge Level:**
- **Who Should Attend:**
- **Prerequisites and/or Advance Preparation:**
- **Learning Objectives/Description:**

**Basics SQL Querying Lab – Part 2 of 2**
- **CPE Credits:** 1.5
- **Knowledge Level:**
- **Who Should Attend:**
- **Prerequisites and/or Advance Preparation:**
- **Learning Objectives/Description:**

**Intermediate SQL Lab**
- **CPE Credits:** 1.5
- **Knowledge Level:**
- **Who Should Attend:**
- **Prerequisites and/or Advance Preparation:**
- **Learning Objectives/Description:**

**Disaster Recovery Planning for Owners and Managers**
- **CPE Credits:** 1.5
- **Knowledge Level:** Beginner
- **Who Should Attend:** Business Owners and Managers
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Do you have a solid plan in place in the event of a disaster? Do you know how much would it cost for your company to be down for a day, week, or more? In this session, we will discuss the steps to plan, create, test, and implement a Business Continuity/Disaster Recovery plan.

Considering a Move to New ERP Software – What Questions to Ask?
CPE Credits: 1.5
Knowledge Level:
Who Should Attend:
Prerequisites and/or Advance Preparation:
Learning Objectives/Description:

Office 365 Overview - Part 1 of 2
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: End users of Office 365 that want to learn more about how to use it
Prerequisites and/or Advance Preparation: Using or looking to use Office 365 at your organization
Learning Objectives/Description: The purpose of this session and the follow up session is to learn about the features of Office 365. Specifically, what benefits does Office 365 offer the end users. We will be covering topics including SharePoint, OneDrive, Teams, Excel, Word, PowerPoint, Outlook and more.

Office 365 Overview - Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: End users of Office 365 that want to learn more about how to use it
Prerequisites and/or Advance Preparation: Using or looking to use Office 365 at your organization
Learning Objectives/Description: The purpose of this session is to learn about the features of Office 365. Specifically, what benefits does Office 365 offer the end users. We will be covering topics including SharePoint, OneDrive, Teams, Excel, Word, PowerPoint, Outlook and more.

Advanced SQL Lab
CPE Credits: 1.5
Knowledge Level:
Who Should Attend:
Prerequisites and/or Advance Preparation:
Learning Objectives/Description:

Understanding Your Sage 300 CRE Database
CPE Credits: 1.5
Knowledge Level:
Who Should Attend:
Prerequisites and/or Advance Preparation:
Learning Objectives/Description:

Excel Power Pivot Lab
CPE Credits: 1.5
Knowledge Level:
Who Should Attend:
Prerequisites and/or Advance Preparation:
Learning Objectives/Description:
Intermediate Excel Lab – Part 1 of 2
CPE Credits: 1.5
Knowledge Level: Intermediate
Version: MS Office 2013
Who Should Attend: Those interested in improving their Excel skills
Prerequisites and/or Advance Preparation: Basic Excel Knowledge
Learning Objectives/Description: In this Lab we will explore various areas of Excel to improve your work processes. Some of those areas include workspace customization, data validation, named cells & ranges, and multiple formulas & functions (including date & time). If time permits, we will have a roundtable Q & A.

Intermediate Excel Lab – Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Intermediate
Version: MS Office 2013
Who Should Attend: Those interested in improving their Excel skills
Prerequisites and/or Advance Preparation: Basic Excel Knowledge and preferred attendance in previous session “Intermediate Excel Lab (1 of 2)”
Learning Objectives/Description: In this continuation Lab we will explore more areas of Excel to improve your work processes. Those areas include pivot tables, conditional formatting, charts & graphs, and protecting & sharing workbooks. If time permits, we will have a roundtable Q & A.

Track 04: IT Administration/IT Managers

New to Managing Sage Environments?
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: IT Managers, Anyone responsible for Sage 300 software
Prerequisites and/or Advance Preparation:
Learning Objectives/Description: Are you new to Sage 300? Did you inherit an existing deployment? Come join this session for an all-encompassing discussion of an On-Prem Sage 300 CRE environment. In this session, our presenter will review many of the facets of these environments, including IT infrastructure considerations, file/folder structures and location, user security and permissions, backup, upgrades, redundancy, and much more.

Why Do You Need a Strong Password?
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Anyone with a password to anything
Prerequisites and/or Advance Preparation: N/A
Learning Objectives/Description: Everyone has password fatigue now days. But what can happen if you relax your password construction or decide two-factor or multi-factor authentication is just too complicated? It’s not a pretty topic to think about. We will look at what a strong password is, what the current recommendations for passwords are and why, what additional protection 2FA/MFA can provide and how utilizing a password manager can make it all so much easier to manage.

How to Properly Backup Sage Data
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: IT Managers, Those who are responsible for Sage Data
Prerequisites and/or Advance Preparation: N/A
Learning Objectives/Description: What is a proper backup? One that will accurately and completely restore when you need it to. In this session, our presenter will review what Sage data needs to be backed up, how to back it up,
when you should back it up, where to store the backups, and finally how to restore the data ensuring complete recovery of Sage data when it is needed.

**Microsoft SharePoint for Document Organization**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone who uses Office or Microsoft 365 and has or wants to store documents in SharePoint
- **Prerequisites and/or Advance Preparation:** N/A
- **Learning Objectives/Description:** There is a lot you can do in Microsoft SharePoint, especially in the Document Library arena. We will look at some of the basics to get you familiar with using it, how to setup new Document Libraries and how to tag files so you can sort, search, organize your data and even get email notifications when you need them.

**Network Administration – Tips from a Pro**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** IT Managers
- **Prerequisites and/or Advance Preparation:** N/A
- **Learning Objectives/Description:** If you’re a “Lone Wolf” IT Administrator like me, you rely on simple yet effective tips, tricks, and tools to help you manage your Network infrastructure efficiently. In this session, I’ll share some of my experiences and tactics that I use to keep my network(s) stable and reliable.

**SQL Database Administration**
- **CPE Credits:** 1.5
- **Knowledge Level:** All levels
- **Who Should Attend:** Anyone interested in a high-level view of SQL database administration
- **Prerequisites and/or Advance Preparation:** None
- **Learning Objectives/Description:** Good and bad practices for administrating SQL Server Databases. We will be discussing SQL database administration as well as admin management styles, every installation of SQL is different, just as each SQL admin is.

**Firewalls and Virtual Private Networks (VPNs) for Business**
- **CPE Credits:** 1.5
- **Knowledge Level:** Intermediate
- **Who Should Attend:** Managers of IT resources
- **Prerequisites and/or Advance Preparation:** None
- **Learning Objectives/Description:** Firewalls and VPNs are a vital part of IT security. However, many managers who are not strictly IT do not know or understand these technologies. In this session, our presenter will explain what Firewalls and VPNs are and what makes them such an important part of your IT infrastructure. We will also discuss how to deploy these technologies to safeguard your data while not compromising remote access.

**Power BI Lecture**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone interested in creating or modifying Power BI reports
- **Prerequisites and/or Advance Preparation:** Basic understanding of where the data is
- **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 data. With this Microsoft tool you can easily share 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 SQL but you can also link in Excel documents as well which we will cover on a basic level.
Building a Tech Roadmap to Drive Success Roundtable
CPE Credits: 1.5
Knowledge Level:
Who Should Attend:
Prerequisites and/or Advance Preparation:
Learning Objectives/Description:

Ask the IT Experts Panel
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.

Track 05: Sage 100 Contractor – Accounting
Software Version: 24.326 or 24.3.x

Sage 100 Contractor: Accounts Payable Basics & Automation Lab
CPE Credits: 1.5
Knowledge Level: Beginner
Who Should Attend: Sage 100 Contractor Users
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Learn how to improve automation from your vendor defaults, to coding your PO’s & Subcontracts, to automatic job costing or of your AP invoices.

Sage 100 Contractor: Accounts Receivable Basics – General Overview Lab
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Accounts Receivable, Anyone involved in billing for the Company
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Sage 100 Contractor Accounts Receivable is a powerful tool! We will do an overview of the Accounts Receivable section and get you set for success!

Sage 100 Contractor: Module 1 - Best Practices for General Ledger
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Accounting Managers, Controllers, Owners
Prerequisites and/or Advance Preparation: General Ledger user
Learning Objectives/Description: We will walk through GL setup, managing & maintaining your COA, Period/Fiscal Year Management, transferring funds, manual checks/deposits and journal transactions. We will also discuss the new security set up for this module.

Sage 100 Contractor: Bill it Special - Progress & T&M Billing in Sage 100 Contractor
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Controller, Accounting, Project Managers
Prerequisites and/or Advance Preparation: Accounts receivable basics
Learning Objectives/Description: Not all billings are the same; some are Special! Let's talk about two special billing options in Sage 100 Contractor - Time & Materials and Progress Billing. We will cover setting up and billing for each type.

Sage 100 Contractor: Accounts Payable Advanced
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Accounting Managers, Controllers, AP Clerks
Prerequisites and/or Advance Preparation: Basic knowledge of the Sage 100 Contractor Accounts Payable
Learning Objectives/Description: Let's go beyond the AP invoice and see what more we can do with AP. We will review the credit card module, 3rd party checks, ACH payments and more!

Sage 100 Contractor: Month End - Info You'll Gain: Reconciling, Reporting, & General Ledger Closeout! Lab
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Controller, Accounting Manager, Owner
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: We will guide you through the steps to common month end closing processes in Sage 100 Contractor. Join us to learn about reconciliation, reporting and general ledger closeout!

Track 06: Sage 100 Contractor – Project Management & Estimating
Software Version: 24.326 or 23.3.x

Sage 100 Contractor: Project Life Cycle - Lab
CPE Credits: 1.5
Knowledge Level: Basic/Intermediate
Who Should Attend: None
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Get an overview of the Project Management modules by going through the life of a job. Follow and understand how the data flows and is related. From Budgets and Proposals, Commitments and their postings, Billings, and- finally, selected reports- this is a great "high level" view.

Sage 100 Contractor: Reports - What to Use, What are Others Using, What Do They Do - Panel
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Sage users
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Come learn what to use, what others are using and what they do.

Sage 100 Contractor: Purchase Orders - When, Where and How to Create Them
CPE Credits: 1.5
Knowledge Level: All levels
Who Should Attend: Project Managers, Purchasing Agents, Accounting
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Learn the various menus from which you can generate POs and why. And the importance of coding them correctly to automate the job costing of the AP invoices, or affecting inventory.

Sage 100 Contractor: Estimating Basics - Something for Everyone - Lab
CPE Credits: 1.5
Knowledge Level: All levels
Who Should Attend: Everyone using or considering Estimating Basic
Prerequisites and/or Advance Preparation: None
**Learning Objectives/Description:** Do you use Estimating Basic? This class will have tips, tricks and a wealth of information whether you are a seasoned user or just getting started. Along with some "basics" we will also see relatively new features and some innovative ways to use old favorites.

**Sage 100 Contractor: Subcontracts - More Than a Document**
**CPE Credits:** 1.5
**Knowledge Level:** All levels
**Who Should Attend:** Everyone working with Subcontractors
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** The Subcontract module provides so much CONTROL with so little effort; from proper coding to cost control. This class will give you new ways to save time and money.

**Sage 100 Contractor: Contract Management & Change Orders - Panel**
**CPE Credits:** 1.5
**Knowledge Level:** Basic
**Who Should Attend:**
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** Make the most of your Contracts & Change orders. Collaborate with industry professionals. Learn their best practices and bring your own.

**Sage 100 Contractor: Cost Management as a Culture Roundtable**
**CPE Credits:** 1.5
**Knowledge Level:** Basic
**Who Should Attend:** Anyone
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** "The Price is Right" - A discussion about how everyone from laborers to estimators, to procurement to upper management effect cost and culture in a company setting.

**Track 07: Sage 100 Contractor – Report Writing & Form Design**
**Software Version:** 24.3.xx

**Sage 100 Contractor: Reporting Basics - Review the Basics of Sage 100 Contractor Reporting - Lab**
**CPE Credits:** 1.5
**Knowledge Level:** Basic
**Who Should Attend:** Sage users
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** New to Sage 100 Contractor? Not sure about reporting? We'll guide you through the basics of Sage reporting, with a general overview to set the basis for your reporting success!

**Sage 100 Contractor: Form Design 1 - The User’s Manual - Lab**
**CPE Credits:** 1.5
**Knowledge Level:** Basic
**Who Should Attend:** Those interested in modifying/creating custom form designs
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** Learning how to use the design tools in Sage 100 Contractor is essential to understanding the various ways you can modify any of the existing system forms or create your own unique templates and designs. You’ll have a chance to practice with each tool, and then put those tools to use in Form Design Part 2.

**Sage 100 Contractor: Sage 100 Contractor: Report Writer 1 Getting Started; Small Steps, Giant Leaps! - Lab**
**CPE Credits:** 1.5
**Knowledge Level:** Basic
Who Should Attend: Everyone  
Prerequisites and/or Advance Preparation: None  
Learning Objectives/Description: It’s time to learn how to write custom reports. This LAB will start at the beginning with the Report Wizard and show how to create and modify reports including tools for Grouping, Sorting, Selection Criteria and Formatting. The class will cover data fields and simple calculated fields. Great for Beginners and anyone who needs a refresher in basic Report Writer skills.

**Sage 100 Contractor: Form Design 2 - Let’s Get Creative! - Lab**  
**CPE Credits:** 1.5  
**Knowledge Level:** Intermediate  
**Who Should Attend:** Users interested in modifying/creating form designs  
**Prerequisites and/or Advance Preparation:** Form Design 1 - The User’s Manual  
**Learning Objectives/Description:** In this session we’ll be using the tools we learned about in Form Design 1 to create a few simple forms that you can use in your own company.

**Sage 100 Contractor: Report Writer 2 - Step it UP! - Lab**  
**CPE Credits:** 1.5  
**Knowledge Level:** Intermediate  
**Who Should Attend:** Anyone wishing to write reports  
**Prerequisites and/or Advance Preparation:** Report Writer 1  
**Learning Objectives/Description:** Take your Report Writer skills to the next level with this LAB focused on Calculated Fields! You will learn to create powerful [SELECT FROM WHERE], IF() THEN() ELSE() and CASE() expressions as well as other useful functions - and top it off with "popups!"

**Track 08: Sage 100 Contractor – Specialty/Misc**  
**Software Version:** 24.3.xx

**Sage 100 Contractor: System Features, Tips & Tricks**  
**CPE Credits:** 1.5  
**Knowledge Level:** All levels  
**Who Should Attend:** All Sage 100 Contractor Users  
**Prerequisites and/or Advance Preparation:** None  
**Learning Objectives/Description:** Many of us spend hours in front of our computers, pushing around the mouse and pecking at the keyboard. It may seem like there’s no way to reduce the amount of time we spend here, but just by doing a few things a little faster, you really can be more efficient. Let’s explore the various built-in features of Sage 100 Contractor that can help you get your work done more quickly and efficiently.

**Sage 100 Contractor: Let’s Get 'Em Paid! Utilizing Payroll Processing in Sage 100 Contractor**  
**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** Payroll Processor, Payroll Assistant  
**Prerequisites and/or Advance Preparation:** None  
**Learning Objectives/Description:** Join us to review basic payroll set up and processing through check writing and posting.

**Sage 100 Contractor: Security Features of Sage 100 Contractor**  
**CPE Credits:** 1.5  
**Knowledge Level:** Intermediate  
**Who Should Attend:** Company management and IT  
**Prerequisites and/or Advance Preparation:** None
Learning Objectives/Description: Sage 100 Contractor provides a variety of security features that enable you to restrict access to data in each company. In this session we'll examine the built-in security settings and provide some tips for configuring those settings to match the needs of your construction business.

Sage 100 Contractor: Employee Information Management and Reporting - Making use of HR Tools
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: HR, Payroll Assistant, Owners
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Learn how use the HR tools in Sage to keep track of important employee information. Also, let's talk about customization options in the Employee Screen to make this relevant for your company needs.

Sage 100 Contractor: Specialty Payroll - Certified & Union
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Payroll processing personnel
Prerequisites and/or Advance Preparation: Payroll basics
Learning Objectives/Description: Understanding the challenges of construction payroll for government and union jobs can help you achieve success and profitability in your company. In this session we’ll be breaking down what you need to know about setting up Sage 100 Contractor to accommodate certified and union payroll processing and reporting.

Sage 100 Contractor: Alternative Data Importing Panel
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: None
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Sometimes you need tools outside of those in your Sage 100 Contractor software. Join our panel discussing alternative ways of getting data in and out – and what to be aware of for a more successful outcome.

Sage 100 Contractor: Conference Wrap Up - What's In Your Tip Jar Now? - Roundtable
CPE Credits: 1.5
Knowledge Level: All
Who Should Attend: Attendees wanting to share their conference experience
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: What a week of learning!! Come share a tip you learned and hear what others are taking home with them! It will be a great wrap up to the Conference.

Sage 100 Contractor: Service Receivables
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Service Managers, Accounts Receivable Clerk, Accounting Manager
Prerequisites and/or Advance Preparation: Basic knowledge of the Sage 100 Contractor Service Receivables Module
Learning Objectives/Description: Service Receivables is a POWERFUL module- are you making it work for YOU? From setup to the workflow this class with give you valuable tips to get the most from it.
**Track 09: Sage Estimating**

*Software Version: Sage Estimating 21.1 and 22.1*

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**Bid Day, Alternates, and Unit Price Bids Lab**

**CPE Credits:** 1.5  
**Knowledge Level:** Intermediate  
**Who Should Attend:** Estimators and estimating database administrators  
**Learning Objectives/Description:** In this interactive lab we will learn how the use of spread sheet sort sequences, the Estimating software alternates functionality, and exporting certain data to and from Microsoft Excel can improve the estimators bid day process and experience. Estimators performing hard bids, unit price bids and teams of estimators needing collaboration on a bid day will benefit from this lab experience and should attend.

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**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:** Prior use of Sage Estimating at a basic level  
**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.

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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. You’ll be able to understand what the Management Console is and how you can use it to manage your Estimate files and more.

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**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. You’ll be able to understand what the Management Console is and how you can use it to manage your Estimate files and more.
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 Estimating Fundamentals Workshop Lecture (1 of 3) and session 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. You’ll be able to understand what the Management Console is and how you can use it to manage your Estimate files and more.

eTakeoff with Bridge Lecture - Part 1 of 2
CPE Credits: 1.5
Version: Sage Estimating v22.1 / eTakeoff v8.x
Knowledge Level: Basic/Intermediate
Who Should Attend: Anyone who is currently using, or interested in implementing, an integrated digital takeoff solution with Sage Estimating.
Prerequisites and/or Advance Preparation: 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: 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 and the new SnapAI functionality.

eTakeoff with Bridge Lab - Part 2 of 2
CPE Credits: 1.5
Version: Sage Estimating v22.1 / eTakeoff v8.x
Knowledge Level: Basic/Intermediate
Who Should Attend: Anyone who is currently using, or interested in implementing, an integrated digital takeoff solution with Sage Estimating.
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.

Sage Estimating Roadmap
Knowledge Level: Basic/Intermediate
Who Should Attend: Estimators
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: You’re invited to participate in this Sage-hosted session to learn more about future plans for Sage Estimating. We’ll also show you some highlights related to recent enhancements, strategic partnerships, and our ongoing pursuit of the pre-construction phase of project lifecycle management. After this session, you should be able to:
- Describe upcoming features in Sage Estimating
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.

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.

Estimating to Job Cost: Sage 100 Contractor and Sage 300 CRE
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.

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: Before beginning this session, you should be familiar with your database setup and know how to perform basic takeoff
Learning Objectives/Description: In this hands-on lab session, you will apply the concepts on how 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.

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 Formulas and Assemblies Lab – Part 1 of 2
Learning Objectives/Description: In this hands-on session, you will apply the concepts on how 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.

**Bring Your Own Estimating Questions**

**Knowledge Level:** Any

**Who Should Attend:** Estimators, database administrators, estimating managers, project managers who use estimating

**Prerequisites and/or Advance Preparation:** Need help? Be prepared to demonstrate or articulate your question or problem. We’d be glad to help.

**Learning Objectives/Description:** Anyone with questions about Sage Estimating, estimating databases, E-takeoff, Bridge, interfaces with Buyout, Project Management, or Job Cost and Bid Matrix? Bring your questions & problems and we will help you sort through the answers you need.

**Track 10: Sage Estimating Database**

**Software Version:** Sage Estimating 21.1

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**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.

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**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.

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**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.

Database Tips & Tricks
CPE Credits: 1.5
Knowledge Level: Intermediate to Advanced
Who Should Attend: Estimators and others wishing to expand their knowledge on building the database
Prerequisites and/or Advance Preparation: A working knowledge of building a Sage Estimating Database
Learning Objectives/Description: Join us for this fast-paced interactive session and discover some of the tips, tricks and shortcuts to building a Sage Estimating database that the instructor has acquired over 30 plus years of working with the Estimating software. We’ll look at shortcuts for building assemblies, formulas, items and more.

SQL Server Management Studio (SSMS) Basics Lecture – Part 1 of 2
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.

SQL Server Management Studio (SSMS) Basics Lab - Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Report writers
Prerequisites and/or Advance Preparation: Attendance in SQL Server Management Studio Basics Lecture Part 1
Learning Objectives/Description: Learn the basics of SQL and how to apply it to Sage Estimating database

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.
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.

Power BI for Estimating & External Reporting Database Lecture – Part 1 of 2

CPE Credits: 1.5
Knowledge Level: Basic
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.

Power BI for Estimating & External Reporting Database Lab – Part 2 of 2

CPE Credits: 1.5
Knowledge Level: Basic
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 and attendance in Power BI for Estimating & External Reporting Database Lecture Part 1

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.

Models Lecture

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 from the ideas and concepts presented in the session
Exporting Sage SQL Estimating Data to MS Office via External Tools 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:** 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 scripts, this session will demonstrate creative ways to export your currently open Sage SQL Estimating content directly to your own Microsoft Excel and Word templates.

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 scripts, 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 11: Sage 300 CRE – Accounting Basics**  
**Software Version:** Sage 300 CRE 20.5

**Sage 300 CRE Concepts**  
**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.

**Using Sage Desktop, Accessing Reports & Inquiries Lab**  
**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 will review the use of Sage Desktop to access project information through a Job Overview homepage, to access module data entry screens using "favorites" shortcuts, and to access reports and inquiries. We will also review settings and setup so that you can customize your Sage Desktop interface on your own workstation back at your office.

**Basic Reports & Inquiries 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 is for new users of the Sage 300 CRE software and will demonstrate how to access the standard reports and inquiries. We will review the report types available and discuss the differences. Then we will look at how to condition reports to display only the data you want shown. We will access standard inquiries and review how to drill down to more detail and how to display more or less related information.

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, enter invoices, select invoices to pay, print checks, and record manual checks.

Job Cost 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: 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.

Job Cost w/out Project Management Basics Lab
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: New users to Job Cost that don't use with the Project Management module
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Learn features within Job Cost that are available when not using the Project Management module, including creating and tracking change orders.

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.

Sage 300 CRE Tips & Tricks
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 the day-to-day use of Sage 300 CRE. Come see some of our favorites and bring your own tips/tricks to share with the group.
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.

101 Ways to Use Custom Fields
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Anyone interested in understanding more about custom fields
Prerequisites and/or Advance Preparation: General knowledge of Sage 300 CRE record structure
Learning Objectives/Description: This session will inform the user about the types of custom fields that can be added to various Sage 300 CRE records and how custom fields can be used in inquiries and reports.

Best Practices: Archiving
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Anyone interested in knowing the why and how of archiving Sage 300 CRE data and what to consider before moving data to history.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: In this session, users will learn the benefits of periodically archiving Sage 300 CRE data, how data is archived in each application, and what should be considered before starting the archiving process.

Cash Management 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: This 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 Edit Register and bank account transfers.

Sage 300 CRE Accounting: Conference Wrap-Up Roundtable
CPE Credits: 1.5
Knowledge Level: All
Who Should Attend: Anyone
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: This session is designed to be an ask the questions that you didn't get answered all week about Sage 300 CRE and/or let us know what else you would like us to include in the next conference. We would also like you to tell us what TUG as an organization can do better to help you!!
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.

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.

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.

Advanced Job Cost 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.

AP Electronic Payments & Positive Pay Lab
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Users interested in processing AP electronic payments and reducing the use of physical checks.

Prerequisites and/or Advance Preparation: Familiarity with the AP module

Learning Objectives/Description: This hand-on lab session will walk you through the process of creating electronic payments within the AP module and teach you the fundamentals of positive pay requirements and reporting.

AP Credit Cards & Recurring Invoices Lab
CPE Credits: 1.5
Knowledge Level: Intermediate

Who Should Attend: Users interested in utilizing the full functionality of the credit card process within the AP module.

Prerequisites and/or Advance Preparation: Familiarity with the AP module

Learning Objectives/Description: This hands-on session will walk you through the workflow of the credit card processing system and the setup of recurring invoices within the AP application.

Financial Statement KPI – Part 1 of 2
CPE Credits: 1.5
Knowledge Level: Beginner

Who Should Attend: Controllers, CFOs, Senior Accountants

Prerequisites and/or Advance Preparation: None

Learning Objectives/Description: KPIs give you a quick reading of how your company is doing. In session 1 of this 2-part class we will review the various types and descriptions of Key Performance Indicators you may use in your company. Then Bob will show you a method of automating the calculation of these KPIs.

Financial Statement KPI – Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Beginner

Who Should Attend: Controllers, CFOs, Senior Accountants

Prerequisites and/or Advance Preparation: Financial Statement KPI – Session 1

Learning Objectives/Description: After Bob teaches Automation in Session 1, Kathy will take over and show you a different way to compose KPIs. She will dig deeper into the reasons you may want to use KPIs and why they are important to your vendors, lenders, and more.

Importing in All Modules Lab - Part 1 of 2
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 the process to import successfully in GL, JC, CM, AP, and AR.

Importing in All Modules Lab - Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Intermediate

Who Should Attend: Controllers, Accounting Managers

Prerequisites and/or Advance Preparation: Attendance in Importing in All Modules Lab - Part 1 of 2

Learning Objectives/Description: Continuation of the previous session. You will learn the process to import successfully in GL, JC, CM, AP, and AR.

Job Cost Miscellaneous Worksheets
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Project Managers, Project Coordinators, Project Accountants, or Controllers who want to do a cost at completion, over/under profit analysis, or post WIP adjustments by job in Sage 300 CRE (JC and/or PJ)

Prerequisites and/or Advance Preparation:

Learning Objectives/Description: Create Miscellaneous worksheet views and understand the options for populating the Miscellaneous worksheets within Sage 300 CRE Job Cost or Project Management modules as well as importing the values using Office Connector Import.

Error Correction AP/CM Lab
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.

Reconciliation Lab - Part 1 of 2 (REPEAT SESSION)
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.

Reconciliation Lab - Part 2 of 2 (REPEAT SESSION)
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.

Track 13: Sage 300 CRE – Payroll
Software Version: Sage 300 CRE 20.5 & 22.2

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. You will also understand how to setup a Union payroll. Q & A, time permitting.

**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.

**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.

**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
- 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
- Useful Inquiries and Reports

**Payroll Reconciliation**
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Attendees who are interested in Reconciling PR to itself, PR to GL and PR to JC.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Learn how to use Reports in Payroll to reconcile your entries.

Payroll Formulas and Functions Lab
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 Formulas and Functions Lab (REPEAT SESSION)
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.

Track 14: Sage 300 CRE – Contracts & Billing
Software Version: Sage 300 CRE 18.4

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.

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 to setup a progress billing and/or lump sum invoices using the contracts module then bill from the Billing module.

Quick Bill Invoicing Lab
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 billing invoice using the features of the Quick Bill task, including the use of standard items, rate table items, standard add-ons as well as manual items.

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 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 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 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 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 - Part 1, 2, and 3 of 4. Attendees should be familiar with structure of job 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.

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. Anyone who creates cost-based on contract billings within the billing module and wants to learn how to revise once posted in AR.

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).

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. Anyone who creates cost-based on contract billings within the billing module and wants to learn how to revise once posted in AR.

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).

Track 15: Sage 300 CRE – Compliance

Software Version: Sage 300 CRE 20.5

Compliance Overview & Setup Lab
CPE Credits: 1.5
Knowledge Level: Basic

Who Should Attend: Users of Sage 300 CRE Project Management (PJ) and/or Accounts Payable (AP) who are involved in managing subcontractors' and vendors' compliance. Necessary for subsequent compliance usage sessions.

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 hands-on lab session will provide an overview of the operation of the Subcontractor Compliance system in Sage 300 CRE. We will work through setting up compliance and look at how settings in Custom Descriptions, AP Settings, AP Vendor Setup and JC Job Setup affect the behavior of the compliance system.
Using Compliance: Managing Insurance Lab  
**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** Users of Sage 300 CRE Project Management (PJ) and/or Accounts Payable (AP) who are involved in managing insurance compliance and insurance certificates for subcontractors.  
**Prerequisites and/or Advance Preparation:** Compliance Overview & Setup recommended  
**Learning Objectives/Description:** This hands-on lab session will cover the steps required to manage insurance and insurance certificates using the Subcontractor Compliance system in Sage 300 CRE. We will review the operation of the Compliance Grid, accessible from Project Management (PJ) or Accounts Payable (AP), and will also review how settings in Custom Descriptions, AP Settings, AP Vendor Setup and JC Job Setup affect the behavior of the compliance system.

Using Compliance: Certified Payroll Reports & Misc. Compliance Lab  
**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** Users of Sage 300 CRE Project Management (PJ) and/or Accounts Payable (AP) who are involved in managing subcontractors and vendors.  
**Prerequisites and/or Advance Preparation:** Compliance Overview & Setup recommended  
**Learning Objectives/Description:** This hands-on lab session will cover the steps required to manage certified payroll reports using the Subcontractor Compliance system in Sage 300 CRE. We will review the operation of the Compliance Grid, accessible from Project Management (PJ) or Accounts Payable (AP), and will also review how settings in Custom Descriptions, AP Settings, AP Vendor Setup and JC Job Setup affect the behavior of the compliance system.

Using Compliance: Lien Waivers Lab  
**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** Users of Sage 300 CRE Project Management (PJ) and/or Accounts Payable (AP) who are involved in managing subcontractors and vendors.  
**Prerequisites and/or Advance Preparation:** Compliance Overview & Setup recommended  
**Learning Objectives/Description:** This hands-on lab session will cover the steps required to manage lien waivers using the Subcontractor Compliance system in Sage 300 CRE. We will review the operation of the Compliance Grid, accessible from Project Management (PJ) or Accounts Payable (AP), and will also review how settings in Custom Descriptions, AP Settings, AP Vendor Setup and JC Job Setup affect the behavior of the compliance system.

Automating Compliance Reporting with MyAssistant Lab  
**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** Experienced users familiar with Subcontractor Compliance who wish to automate reporting using the MyAssistant application.  
**Prerequisites and/or Advance Preparation:** Familiarity with MyAssistant and with Subcontractor Compliance workflow  
**Learning Objectives/Description:** This hands-on lab will review the steps to automate subcontractor compliance reporting. We will review how to setup email distribution lists in MyAssistant to allow your system to send to your Project Managers as well as directly to your Vendors. We will review how to setup the MyAssistant Tasks and Conditions to send automated, personalized emails. We will also discuss how to attach Crystal Reports and how to match the report parameters to the MyAssistant condition and email distribution list.

Automating Lien Waivers with MyAssistant Lab  
**CPE Credits:** 1.5  
**Knowledge Level:** Intermediate
Who Should Attend: Users familiar with using Subcontractor Compliance to manage lien waivers who wish to automate the process using MyAssistant.

Prerequisites and/or Advance Preparation: Familiarity with Subcontractor Compliance workflow and operation.

Learning Objectives/Description: This hands-on lab will cover the steps to create the MyAssistant Tasks and Conditions to automatically send lien waiver forms to vendors and reminders to you.

**Track 16: Sage 300 CRE – Project Management Basics**

*Software Version: Sage 300 CRE 20.5*

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**PJ Job Setup Lab**

- **CPE Credits:** 1.5  
- **Knowledge Level:** Basic  
- **Who Should Attend:** Accounting or Project team member responsible for setting up new jobs in Sage.  
- **Prerequisites and/or Advance Preparation:** None  
- **Learning Objectives/Description:** We will learn how to set up a new job in PJ and explore what job information flows between JC jobs and PJ jobs. We will also look at checklists, contacts and custom fields in PJ job setup.

**PJ Document Tools Lab**

- **CPE Credits:** 1.5  
- **Knowledge Level:** Basic  
- **Who Should Attend:** Users new to the Project Management (PJ) Document Tools - project managers, project coordinators, and project assistants or anyone responsible for documenting or reviewing the job documents such as RFIs, Submittals, Drawing Log and Transmittals.  
- **Prerequisites and/or Advance Preparation:** None  
- **Learning Objectives/Description:** This hands-on lab session will go through detailed steps of setting up job contacts and managing RFIs, Transmittals, Submittals and Meeting Minutes.

**Job Financials Lab (Enter Estimate, Enter Commitments)**

- **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 hands-on session covers the 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 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 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 Tips and Tricks  
CPE Credits: 1.5  
Knowledge Level:  
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 utilize Project Management workflow.  
Prerequisites and/or Advance Preparation: N/A  
Learning Objectives/Description:  
- Setting up jobs in Project Management  
- Default settings for time savers  
- Documents in Project Management review - Transmittals, Correspondence, Drawing Logs, Meeting Minutes, RFI's, Submittals, Field Reports and Custom Logs  
- Contract Control for all change management needs  
- Using custom fields to track change management  
- Settings and best practices for meaningful reports

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 17: Sage 300 CRE – Project Management Advanced
Software Version: Sage 300 CRE 20.5

Setting Up Sage Desktop & Managing Config Files
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Experienced Project Management or Accounting staff responsible for setup and configuration.
Prerequisites and/or Advance Preparation: Understanding of the use of Sage Desktop, Desktop Home Page Reports, and customization of Sage Desktop Favorites.
Learning Objectives/Description: This lecture will provide an overview of Sage Desktop and how sage uses individual Configuration files for settings for each user. We will discuss recommended practices to allow users to "copy" customizations from other users and to locate Configuration files in a shared location so that they may be used during local and/or remote sessions.

Procore Integration – Introduction and Overview
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Sage 300 Users just starting to utilize or thinking about utilizing the Sage 300/Procore Financials Integration
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: Introduction and Overview of Sage 300 CRE ERP Integration with Procore Financials

Procore Integration – Integration Challenges and Error Correction
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: Sage 300 Users who are utilizing the Sage/Procore Financial Integration
Prerequisites and/or Advance Preparation: Roundtable for existing Sage300/Procore ERP clients to discuss challenges/errors with the ERP integration and suggestions on how to tackle them. Bring your top challenges, tips and tricks to share.

Advanced Job Financials Lab – Part 1 of 2
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Project Managers, Project Assistants and Project Coordinators or Project Accountants who are responsible for entering Financial Data into Sage 300 CRE (JC and/or PJ)
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: This lab session will cover entering financial information into Sage 300 CRE Job Cost (JC) and Project Management (PJ) Modules. We will cover step by step instructions to setup cost codes and categories including extras, enter estimated costs, setup Subcontracts and/or Purchase Orders using Enter Commitments as well as best practices and Q&A.

Advanced Job Financials Lab – Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Project Managers, Project Assistants and Project Coordinators or Project Accountants who are responsible for entering Financial Data into Sage 300 CRE (JC and/or PJ)
Prerequisites and/or Advance Preparation: Advanced Job Financials Lab - Part 1 of 2
Learning Objectives/Description: This lab session will cover entering financial information into Sage 300 CRE Job Cost (JC) and Project Management (PJ) Modules. We will cover step by step instructions to setup cost codes and
categories including extras, enter estimated costs, setup Subcontracts and/or Purchase Orders using Enter Commitments as well as best practices and Q&A.

**Advanced Change Management Lab - Part 1 of 2 (Concepts)**
- **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.

**Advanced Change Management Lab - Part 2 of 2 (Downstream)**
- **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.

**Track 18: Sage 300 CRE – Service Contractor**

*Software Version: Sage 300 CRE 20.5*

**Service Management (SM) Roundtable - Bring it, Share it, Solve it!**
- **Knowledge Level:** Intermediate
- **Who Should Attend:** Anyone who is interested in hearing or sharing challenges and solutions for Service Management should attend this session.
- **Prerequisites and/or Advance Preparation:** Bring a topic, or an open mind to help solve someone else's challenge.
- **Learning Objectives/Description:** We’re counting on your participation in this session. Share your struggles with Service Management or needs you’re not able to address in your service group. We’ll put our heads and experience together to craft solutions or workarounds. Bring your WINS too in case they’ll help others who face similar challenges! Please provide thoughts or ideas to the facilitator prior to the conference to help us better prepare for this session.

**Service Management (SM) and Sage Service Ops (SSO) - A Powerful Partnership**
- **CPE Credits:** 1.5
- **Knowledge Level:** Intermediate
- **Who Should Attend:** Those people interested in learning more about how Sage Service and Field Operations (SSO) can extend Service Management in the field. Even customers who already use SSO may learn something new in this session. This session focuses on features that are more flexible in SSO or only available in SSO.
- **Prerequisites and/or Advance Preparation:** Familiarity with SM, but not required to know Sage Service and Field Operations
- **Learning Objectives/Description:** Join us to take a closer look at the Sage Service Operations features that can expand and enhance your service task efficiency.
Get Creative with Service Management (SM)
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: People who want to see or hear about ways to use features in Service Management creatively or for efficiency.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: In this session, think outside the box when it comes to setup and workflows in Service Management. If you think you utilize all the features, attend this session to see if you really do! Learn about ways to build efficiency into your processes too!

Service Management (SM) Creativity in Practice Lab
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: If you attended the lecture, we'll put the concepts from the lecture into action.
Prerequisites and/or Advance Preparation: Lecture session is highly recommended.
Learning Objectives/Description: Join this SM-focused lab to dig in and try out ideas to build SM efficiencies and creativity. We'll primarily focus on workflows we learned about in the SM creativity session.

Software Version: Sage 300 CRE 20.5 & 22.2

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.

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**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.

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**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.

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**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, but attendance for Part 1 is required. 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 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.

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**Financial Statement Designer 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.
Financial Statement Designer 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: Must attend Financial Statement Designer 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.

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.

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.

**Track 20: Sage 300 CRE - MyAssistant**

*Software Version: Sage MyAssistant 22.1.0*

**Introduction & Getting Started with Sage MyAssistant**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone wanting to learn more about the fundamentals of MyAssistant and how it can be used
- **Prerequisites and/or Advance Preparation:** None
- **Learning Objectives/Description:** After this session you will have several ideas on how MyAssistant can be used, a fundamental understanding of how the MyAssistant software works, and how to get started using it.

**Automate with MyAssistant: Insurance Alerts, Miscellaneous Compliance, and More AP Vendor Management**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone who works with Vendor Compliance Items. Insurance tracking, certified payrolls, lien waivers, and more.
- **Prerequisites and/or Advance Preparation:** introduction to MyAssistant
- **Learning Objectives/Description:** In this class we will work extensively in the Compliance Modules and how to use MyAssistant to notify your vendors, project managers, and AP staff when vendors are out of compliance.

**Automate with MyAssistant: Electronic Payment Notices, AP Invoice Warnings, Lien Waivers, and More Cash Management**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone who wants to improve the information used to manage projects
- **Prerequisites and/or Advance Preparation:** None
- **Learning Objectives/Description:** Learn how to do things like automatically generate and send Electronic Payment notices or Lien Waivers to vendors. Also learn how to be alerted of things like when an invoice from a vendor with compliance issues is selected for payment, or when invoices have expiring discounts.

**Automate with MyAssistant: PR Pay Stubs, Employee Setup, Benefit Eligibility, and More PR Processing**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
- **Who Should Attend:** Anyone interested in automating / improving their Receivables processes
- **Prerequisites and/or Advance Preparation:** None
- **Learning Objectives/Description:** Learn how to do things like automatically generate and send pay statements to employees and be alerted when Employee setup information is missing in Sage. Also learn how to do things like automatically contact Employees becoming eligible for benefits, and more.

**Build Your Own Tasks with New Simplified MyAssistant Processes Lab**
- **CPE Credits:** 1.5
- **Knowledge Level:** Basic
Who Should Attend: Anyone interested in learning how to quickly and easily set up MyAssistant to actively monitor Sage and notify the needed parties when situations occur.

Prerequisites and/or Advance Preparation: None

Learning Objectives/Description: After this session you will know how to set up MyAssistant Tasks with its new, simplified process. You will learn different ways MyAssistant can be used, different types of communications it can create and send, and you will gain ideas on new ways to use the software.

Automate with MyAssistant: AR Aging Spreadsheets, Customer Statements, Cash Receipt Alerts, and More AR Management
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Anyone wanting to be more proactive managing Customers, AR, and Cash Receipts.

Prerequisites and/or Advance Preparation: Introduction to MyAssistant

Learning Objectives/Description: In this MyAssistant class, Bob will show you how to create and send AR Aging Reports to your Project Managers for each of their jobs. We will also show you how to automate the emailing of Customer Statements using MyAssistant. Next, we will create a MyAssistant Task that will send Cash Receipts notifications to your Accounts Payable Department to facilitate pay-when-paid payments of the invoices related to the cash received.

Automate with MyAssistant: Job Over-Budget Warnings, Project Manager Reports, Job Billings, and More JC Cost Control
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Job Cost Clerks, Project Managers

Prerequisites and/or Advance Preparation: Introduction to MyAssistant

Learning Objectives/Description: In this MyAssistant class we will learn how to send various Job Cost Reports. You will learn how to send Project Managers the information for only their Jobs, automatically. Finally, you'll learn how to attach reports created in Report Designer to emails and have them send automatically.

Automate with MyAssistant: Audit Sage Data Entry Job, Vendor, and Employee Setup
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Anyone interested in learning how to automatically monitor their information entered into Sage

Prerequisites and/or Advance Preparation: None

Learning Objectives/Description: Learn how to be automatically alerted of things set up in Sage incorrectly or with missing information; like Vendors missing 1099 information, started Jobs without an estimate, time entered to closed Jobs, Employees with no email address entered, and more.

Tips, Tricks, and Ideas for Getting More from Sage MyAssistant
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Anyone wanting to get more out of their MyAssistant software

Prerequisites and/or Advance Preparation: None

Learning Objectives/Description: Learn numerous MyAssistant tips around different topics like search, Email Directories, new ways to create and save Tasks, saving copies of documents and spreadsheets to a folder, managing your sending queue, password-protecting attachments, and more.
**Track 21: Sage 300 CRE – Office Connector**

*Software Version: Sage 300 CRE 20*

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**Office Connector Basics 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.

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**Office Connector Commitment Management 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.

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**Office Connector Commitment Management 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.

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**Office Connector Financials Lab**

*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.

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**Liberty Reports for Sage 100 Contractor**

*CPE Credits: 1.5*

*Knowledge Level: Basic*

*Who Should Attend/Relevant Software:* People interested in generating Excel based reports using Sage 100 Contractor Data

*Prerequisites and/or Advance Preparation:* None
Learning Objectives/Description: You will leave with fundamentals which will allow you to start writing your own reports, and also great resource materials to help you grow your report development skills.

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 Office Connector flavors (Query, Write and Import) to give you more confidence in creating specific reports and pushing data back into Sage.

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 Roundtable Q & A
Knowledge Level: All
Who Should Attend: Anyone who has questions on the Office Connector Program or who is interested in Office Connector.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: The roundtable session will focus on all aspects of the Office Connector Suite of Products – Office Connector Query, Financials, Write and Import. It is meant to be an interactive session. Questions on Office Connector will be addressed.

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 reports and tools such as Query Wizard and Function Wizards.
Learning Objectives/Description: Ramp up building 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 reports and tools such as Query Wizard and Function Wizards, plus Attendance in Intermediate/Advanced OC Concepts Lab - Part 1 of 2.
Learning Objectives/Description: Ramp up building reports with Office Connector Wizards, then take them to the next level, modifying SQL and recording Macros.
Track 22: Sage 300 CRE – Crystal Reports
Software Version: Crystal Reports 2013, Sage 300 CRE 20+

Intro to Crystal for Sage 300 CRE Lab - Part 1 of 4
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Want to learn how to write your own custom reports? There is no tool better suited, easier to learn or more powerful than Crystal Reports. The knowledge you learn in this course will serve you for the rest of your working career.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: In this completely redesigned class, we will cover just the basics. With the basics under your belt, you can begin building reports you always wished you had. Free yourself from being told it can't be done or having to wait for a consultant to build it for you. If the data exists, it can be done! During this 4-part course you will learn how to start a report from scratch. How to select the tables needed to complete your report. How to create relationships between multiple tables through linking. How to filter the report for just the results you are looking for. And of course, you'll learn how to sort, subtotal and format your report for professional looking results. We will take a short look at formulas just to get you familiar with them though you can take the functions and formula class later in the week for an in-depth look. We will finish off this course with parameters so you can prompt your coworkers to answer certain question prior to running the report so they only get the data they want; in the format they are looking for. And last you will learn how to load your new crystal report on the Sage 300 reports menu.

Intro to Crystal for Sage 300 CRE Lab - Part 2 of 4
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Want to learn how to write your own custom reports? There is no tool better suited, easier to learn or more powerful than Crystal Reports. The knowledge you learn in this course will serve you for the rest of your working career.
Prerequisites and/or Advance Preparation: Attendance in Basic Crystal Lab - Part 1
Learning Objectives/Description: In this completely redesigned class, we will cover just the basics. With the basics under your belt, you can begin building reports you always wished you had. Free yourself from being told it can't be done or having to wait for a consultant to build it for you. If the data exists, it can be done! During this 4-part course you will learn how to start a report from scratch. How to select the tables needed to complete your report. How to create relationships between multiple tables through linking. How to filter the report for just the results you are looking for. And of course, you'll learn how to sort, subtotal and format your report for professional looking results. We will take a short look at formulas just to get you familiar with them though you can take the functions and formula class later in the week for an in-depth look. We will finish off this course with parameters so you can prompt your coworkers to answer certain question prior to running the report so they only get the data they want; in the format they are looking for. And last you will learn how to load your new crystal report on the Sage 300 reports menu.

Intro to Crystal for Sage 300 CRE Lab - Part 3 of 4
CPE Credits: 1.5
Knowledge Level: Basic
Who Should Attend: Want to learn how to write your own custom reports? There is no tool better suited, easier to learn or more powerful than Crystal Reports. The knowledge you learn in this course will serve you for the rest of your working career.
Prerequisites and/or Advance Preparation: Attendance in Basic Crystal Lab – Parts 1 and 2
Learning Objectives/Description: In this completely redesigned class, we will cover just the basics. With the basics under your belt, you can begin building reports you always wished you had. Free yourself from being told it can't be done or having to wait for a consultant to build it for you. If the data exists, it can be done!
During this 4-part course you will learn how to start a report from scratch. How to select the tables needed to complete your report. How to create relationships between multiple tables through linking. How to filter the report for just the results you are looking for. And of course, you'll learn how to sort, subtotal and format your report for professional looking results. We will take a short look at formulas just to get you familiar with them though you can take the functions and formula class later in the week for an in-depth look. We will finish off this course with parameters so you can prompt your coworkers to answer certain question prior to running the report so they only get the data they want; in the format they are looking for. And last you will learn how to load your new crystal report on the Sage 300 reports menu.

**Intro to Crystal for Sage 300 CRE Lab - Part 4 of 4**

**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** Want to learn how to write your own custom reports? There is no tool better suited, easier to learn or more powerful than Crystal Reports. The knowledge you learn in this course will serve you for the rest of your working career.  
**Prerequisites and/or Advance Preparation:** Attendance in Basic Crystal Lab – Parts 1, 2, and 3  
**Learning Objectives/Description:** In this completely redesigned class, we will cover just the basics. With the basics under your belt, you can begin building reports you always wished you had. Free yourself from being told it can't be done or having to wait for a consultant to build it for you. If the data exists, it can be done!

During this 4-part course you will learn how to start a report from scratch. How to select the tables needed to complete your report. How to create relationships between multiple tables through linking. How to filter the report for just the results you are looking for. And of course, you'll learn how to sort, subtotal and format your report for professional looking results. We will take a short look at formulas just to get you familiar with them though you can take the functions and formula class later in the week for an in-depth look. We will finish off this course with parameters so you can prompt your coworkers to answer certain question prior to running the report so they only get the data they want; in the format they are looking for. And last you will learn how to load your new crystal report on the Sage 300 reports menu.

**Linking Crystal Reports Lab - Part 1 of 2**

**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** All those that have taken a Crystal Beginners course and want insight into the art of linking tables.  
**Prerequisites and/or Advance Preparation:** Have taken an intro to Crystal Reports class  
**Learning Objectives/Description:** During this multi-section course, we will dive deeper into the art of linking tables. Linking truly is an art as you can link tables together in multiple ways and still return the correct data. We can link better once we know what is going on behind the scenes. During this course we will go into detail over how to not only understand what is going on with the links but how to build our report so that it runs faster and more efficiently. In addition, we will cover linking Subreports as well.

**Linking Crystal Reports Lab - Part 1 of 2**

**CPE Credits:** 1.5  
**Knowledge Level:** Basic  
**Who Should Attend:** All those that have taken a Crystal Beginners course and want insight into the art of linking tables.  
**Prerequisites and/or Advance Preparation:** Have taken an intro to Crystal Reports class and attendance in Linking Crystal Reports - Part 1.  
**Learning Objectives/Description:** During this multi-section course, we will dive deeper into the art of linking tables. Linking truly is an art as you can link tables together in multiple ways and still return the correct data. We can link better once we know what is going on behind the scenes. During this course we will go into detail over
how to not only understand what is going on with the links but how to build our report so that it runs faster and more efficiently. In addition, we will cover linking Subreports as well.

**Intermediate Crystal Reports Lab - Part 1 of 2**  
*CPE Credits: 1.5*  
*Knowledge Level: Intermediate*  
**Who Should Attend:** All those that have taken the Intro to Crystal Reports and want to build upon those skills.  
**Prerequisites and/or Advance Preparation:** Basic Understanding of how to build, group and subtotal Crystal Reports  
**Learning Objectives/Description:** In this fast-paced class we will dive deeper into formulas, parameters and, cross tabs and even touch on Subreports. Once you've mastered the essentials these skills will allow you to build virtually any report needed. With the use of Cross tabs and Subreports you can present your data in meaningful actionable ways. Perhaps the one feature that more than anything else sets Crystal Reports apart is the ability to have as many subreport as you need.

**Intermediate Crystal Reports Lab - Part 2 of 2**  
*CPE Credits: 1.5*  
*Knowledge Level: Intermediate*  
**Who Should Attend:** All those that have taken the Intro to Crystal Reports and want to build upon those skills.  
**Prerequisites and/or Advance Preparation:** Basic Understanding of how to build, group and subtotal Crystal Reports and attendance in Intermediate Crystal Reports – Part 1.  
**Learning Objectives/Description:** In this fast-paced class we will dive deeper into formulas, parameters and, cross tabs and even touch on Subreports. Once you've mastered the essentials these skills will allow you to build virtually any report needed. With the use of Cross tabs and Subreports you can present your data in meaningful actionable ways. Perhaps the one feature that more than anything else sets Crystal Reports apart is the ability to have as many subreport as you need.

**Crystal Reports Tips & Tricks Lab**  
*CPE Credits: 1.5*  
**Version:** Crystal 2013 SP2  
*Knowledge Level: Intermediate*  
**Who Should Attend:** Anyone with basic knowledge of Crystal that wants to learn more.  
**Prerequisites and/or Advance Preparation:** Basic knowledge of Crystal.  
**Learning Objectives/Description:** This session will cover tips and tricks for Crystal Reports like conventions for renaming reports, inserting logos, changing the Crystal settings, and more. The last 30 minutes will be a Bring Your Own Question section allowing you the opportunity to ask how to do something.

**Intro to SQL for Crystal Reports Lab - Part 1 of 2**  
*CPE Credits: 1.5*  
*Knowledge Level: Intermediate*  
**Who Should Attend:** All those wanting to learn SQL and then using that new skill to build better reports.  
**Prerequisites and/or Advance Preparation:** None  
**Learning Objectives/Description:** During this 2-part course we will learn basic SQL skills. Then put these skills to work building reports you may have thought impossible. These SQL Skills will allow you to build faster more efficient reports. During the first session we will go over basic SQL commands. Then follow that up in the second session building a report or two that will leave you saying how did we do that. In addition, you will walk away with a skill worth putting on your resume.

**Intro to SQL for Crystal Reports Lab - Part 2 of 2**  
*CPE Credits: 1.5*  
*Knowledge Level: Intermediate*  
**Who Should Attend:** All those wanting to learn SQL and then using that new skill to build better reports.  
**Prerequisites and/or Advance Preparation:** Have taken the Intro to SQL for Crystal Reports – Part 1.
Learning Objectives/Description: During this 2-part course we will learn basic SQL skills. Then put these skills to work building reports you may have thought impossible. These SQL Skills will allow you to build faster more efficient reports. During the first session we will go over basic SQL commands. Then follow that up in the second session building a report or two that will leave you saying how did we do that. In addition, you will walk away with a skill worth putting on your resume.

Beyond the Basics SQL Lab – Part 1 of 2
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Those wanting to build upon their intro level SQL/Crystal Skills
Prerequisites and/or Advance Preparation: Good knowledge of Crystal Reports and have taken the Intro SQL for Crystal Class
Learning Objectives/Description: During this two-part class we will build upon the SQL you learned in the Intro to SQL for Crystal class. We will learn valuable functions that speed up your reports, reduce the number of records returned and help you pull data from multiple tables in Sage 300. This SQL knowledge enables you to avoid slow subreports, slow processing reports as a whole and allows for much better exports to Excel.

Beyond the Basics SQL Lab – Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Those wanting to build upon their intro level SQL/Crystal Skills
Prerequisites and/or Advance Preparation: Good knowledge of Crystal Reports and have taken the Intro SQL for Crystal Class and Beyond the Basics SQL Lab – Part 1.
Learning Objectives/Description: During this two-part class we will build upon the SQL you learned in the Intro to SQL for Crystal Class. We will learn valuable functions that speed up your reports, reduce the number of records returned and help you pull data from multiple tables in Sage 300. This SQL knowledge enables you to avoid slow subreports, slow processing reports as a whole and allows for much better exports to Excel.

Job Cost WIP Reporting with Drill-Down Crystal Reports Lab – Part 1 of 2
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: All those who want a drill-down capable Job Cost WIP style report.
Prerequisites and/or Advance Preparation: Have taken the Beginners and Intermediate Crystal Report class.
Learning Objectives/Description: During this multi-part class, we will build a Crystal WIP report. We will build it so that it exports well to Excel. Then as a bonus we will build on-demand Subreports for each column allowing you to drill-down to the transactional detail. Basically, building an inquiry into the report. The skills you learn in this 2-part course will help you build so many more powerful drill-down reports. Think drill-down financials just to name one.

Job Cost WIP Reporting with Drill-Down Crystal Reports Lab – Part 2 of 2
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend: All those who want a drill-down capable Job Cost WIP style report.
Prerequisites and/or Advance Preparation: Have taken the Beginners and Intermediate Crystal Report class and attendance in the Job Cost WIP Reporting w/ Drill-Down Crystal Reports Lab – Part 1.
Learning Objectives/Description: During this multi-part class, we will build a Crystal WIP report. We will build it so that it exports well to Excel. Then as a bonus we will build on-demand Subreports for each column allowing you to drill-down to the transactional detail. Basically, building an inquiry into the report. The skills you learn in this 2-part course will help you build so many more powerful drill-down reports. Think drill-down financials just to name one.

Crystal Reports – How to Modify Canned Reports Lab
CPE Credits: 1.5
Version: Crystal 2013 SP2
Knowledge Level: Intermediate
Who Should Attend: Anyone with basic knowledge of Crystal that is interested in modifying existing reports.
Prerequisites and/or Advance Preparation: Basic knowledge of Crystal
Learning Objectives/Description: This session will cover how to format or modify fields, how to insert a picture or logo, how to add grouping and summarize a group, adding basic formulas, how to add page numbering, and more.

Track 23: Sage 300 CRE – Open Database Connectivity (ODBC) & Microsoft Access

Software Version: Sage 300 CRE 20.4, Office 365

Basic ODBC with Excel and Access Lab - 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 lab 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 lab 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 lab 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 lab 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 and Access Lab - Part 1 of 4
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Attendees looking for additional ways to use ODBC for reporting and manipulating Sage 300 CRE Data using Microsoft Excel and 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 in Microsoft Excel and Access. Previous attendance in one of the Intermediate ODBC Labs recommended but not required.
Learning Objectives/Description: This class will expand on ODBC reporting and manipulating concepts presented in the Beginning and Intermediate ODBC Labs using a variety of advanced exercises and examples. We will also cover any special requests from attendees of the earlier ODBC labs.

Advanced ODBC with Excel and Access Lab - Part 2 of 4
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Attendees looking for additional ways to use ODBC for reporting and manipulating Sage 300 CRE Data using Microsoft Excel and 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 in Microsoft Excel and Access. Previous attendance in one of the Intermediate ODBC Labs recommended but not required.
Learning Objectives/Description: This class will expand on ODBC reporting and manipulating concepts presented in the Beginning and Intermediate ODBC Labs using a variety of advanced exercises and examples. We will also cover any special requests from attendees of the earlier ODBC labs.

Advanced ODBC with Excel and Access Lab - Part 3 of 4
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Attendees looking for additional ways to use ODBC for reporting and manipulating Sage 300 CRE Data using Microsoft Excel and 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 in Microsoft Excel and Access. Previous attendance in one of the Intermediate ODBC Labs recommended but not required.
Learning Objectives/Description: This class will expand on ODBC reporting and manipulating concepts presented in the Beginning and Intermediate ODBC Labs using a variety of advanced exercises and examples. We will also cover any special requests from attendees of the earlier ODBC labs.
Advanced ODBC with Excel and Access Lab - Part 4 of 4
CPE Credits: 1.5
Knowledge Level: Advanced
Who Should Attend: Attendees looking for additional ways to use ODBC for reporting and manipulating Sage 300 CRE Data using Microsoft Excel and 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 in Microsoft Excel and Access. Previous attendance in one of the Intermediate ODBC Labs recommended but not required.
Learning Objectives/Description: This class will expand on ODBC reporting and manipulating concepts presented in the Beginning and Intermediate ODBC Labs using a variety of advanced exercises and examples. We will also cover any special requests from attendees of the earlier ODBC labs.

Track 24: Sage Software

Is Sage Intacct Construction Your Next Construction Solution?
Knowledge Level: Beginner to Intermediate
Who Should Attend/Relevant Software: If you've never seen Sage Intacct Construction or you’re curious about it as a construction solution, this session is for you. Join us for an introduction to the product, to learn about the progress we’ve made since the last TUG conference, and to hear about upcoming features.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
- Describe recently added construction features.
- Determine whether Sage Intacct Construction is part of your company’s move to the cloud.
- Contact the appropriate people when you have an interest in Sage Intacct Construction.

Exploring Options to Move to the Cloud
Knowledge Level: Beginner to Intermediate
Who Should Attend/Relevant Software: Attendees who are considering when to move to a cloud-based construction solution and want to be informed of your options within the Sage suite of products, whether it’s a cloud-hosted solution or true cloud native solution.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
- Describe cloud-based options for Sage Construction and Real Estate customers.
- List which products also integrate with Sage Intacct Construction.
- Determine how the Customer Loyalty Program benefits you!
- Decide whether it’s time to contact your business partner to start strategizing your move.

Sage Intacct Core Features Lab (Bring Your Own Laptop)
CPE Credits: 1.5
Knowledge Level: Beginner
Who Should Attend/Relevant Software: Attendees who want to learn about Sage Intacct core accounting functionality – Accounts Payable, Accounts Receivable, General Ledger.
Prerequisites and/or Advance Preparation: Bring your laptop and we’ll provide a login for you to navigate in the software and follow along. Note that Construction Features are covered in a separate session.
Learning Objectives/Description:
After participating in this session, you will be able to...
- Assess available core accounting functionality.
Sage Intacct Core Features Lab (Bring Your Own Laptop) – REPEAT SESSION
CPE Credits: 1.5
Knowledge Level: Beginner
Who Should Attend/Relevant Software: Attendees who want to learn about Sage Intacct core accounting functionality – Accounts Payable, Accounts Receivable, General Ledger.
Prerequisites and/or Advance Preparation: Bring your laptop and we’ll provide a login for you to navigate in the software and follow along. Note that Construction Features are covered in a separate session.
Learning Objectives/Description:
After participating in this session, you will be able to...
  • Assess available core accounting functionality.

Sage Intacct Construction Payroll
CPE Credits: 1.5
Knowledge Level:
Who Should Attend/Relevant Software: Attendees who process Payroll in-house and may be looking to move to the Sage Intacct Construction product in the future.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
  • Describe the general capabilities of Sage Intacct Construction Payroll.
  • Describe how Sage Intacct Construction Payroll addresses union requirements.
  • Describe the variety of rate determination methods available in Sage Intacct Construction Payroll.

Sage Intacct Real Estate
CPE Credits: 1.5
Knowledge Level: Beginner
Who Should Attend/Relevant Software: Attendees who want to learn how Sage Intacct Real Estate enables you to capture revenue opportunities, monitor performance, and increase property and portfolio value. We’ll compare this product to the Sage CRE Property Management module, so you can easily assess its suitability to manage your commercial and mixed-used portfolios.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
  • Describe how Sage Intacct Real Estate handles Lease Management activities for commercial and mixed-use properties.
  • Describe how Sage Intacct Real Estate integrates with the core Sage Intacct solution.
  • Assess appropriateness of the Real Estate solution for your business.

Sage Intacct Construction Features Lab (Bring Your Own Laptop)
CPE Credits: 1.5
Knowledge Level: Beginner to Intermediate
Who Should Attend/Relevant Software: Attend this session to learn about Sage Intacct Construction functionality, including the project Work breakdown structure, Estimate and Contract setup, Construction Commitment tracking, and construction billing.
Attend the Sage Intacct Core Features session to learn more about Sage Intacct core accounting functionality. These sessions are each offered twice to accommodate multiple attendee schedules.
Prerequisites and/or Advance Preparation: Bring your laptop and we’ll provide a login for you to navigate in the software and follow along.
Learning Objectives/Description:
After participating in this session, you will be able to...
  • Compare construction functionality to your current Sage solution.
  • Note functional areas to dig deeper.
Sage Paperless Construction: Expert Tips for Optimizing AP Workflow Automation

**Presenters:** Jacob Dawson, Senior Paperless Expert

**Knowledge Level:**

**Who Should Attend:**

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

**Learning Objectives/Description:** This is your chance to hear from & interact with the Sage Paperless Construction product team. This session will spotlight how Sage Paperless Construction can save you time & money, and will feature pro tips & tricks for seasoned users. Learn how Sage Paperless Construction, with an all-new look and feel, works right within your Sage system to take cumbersome manual approval and coding systems into the 21st century. Designed to be useful both for experienced users and for those who are curious about the solution, you’ll definitely learn something new!

Sage Intacct Construction Features Lab (Bring Your Own Laptop) – REPEAT SESSION

**CPE Credits:** 1.5

**Knowledge Level:** Beginner to Intermediate

**Who Should Attend/Relevant Software:** Attend this session to learn about Sage Intacct Construction functionality including the project Work breakdown structure, Estimate and Contract setup, Construction Commitment tracking and construction billing.

Attend the **Sage Intacct Core Features** session to learn more about Sage Intacct core accounting functionality. These sessions are each offered twice to accommodate multiple attendee schedules.

**Prerequisites and/or Advance Preparation:** Bring your laptop and we’ll provide a login for you to navigate in the software and follow along.

**Learning Objectives/Description:**

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

- Compare construction functionality to your current Sage solution.
- Note functional areas to dig deeper.

Sage Intacct Construction for the Service Contractor

**CPE Credits:** 1.5

**Knowledge Level:**

**Who Should Attend/Relevant Software:** Along with your construction organization, do you run a service group?

Join this session to see how Sage Field Operations can be used by your construction field teams as well as your service technicians. If you need to capture time on your project or document completed work on a Service Work Order, Sage Field Operations is for you!

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

**Learning Objectives/Description:**

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

- Describe how Sage Field Operation can be used by your construction field teams.
- Describe how Sage Field Operations can help keep your service technicians in touch with your service back office.
- Describe how Sage Field Operations can handle the day-to-day needs of your service department.

Sage Intacct Marketplace Review

**Knowledge Level:**

**Who Should Attend/Relevant Software:** Curious about what makes Sage Intacct products special? Attend this session to learn about the Sage Intacct Marketplace and some of the featured products that can integrate directly with Sage Intacct Construction to provide a more robust construction solution.

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

**Learning Objectives/Description:**

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

- Identify additional products that integrate with Sage Intacct Construction and Real Estate.
Sage Intacct Construction – A Deeper Dive
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend/Relevant Software: As you plan your move to a robust native-cloud solution, take advantage of this opportunity to dig deeper into Sage Intacct Construction. Bring questions you noted from earlier sessions and dig into the details of workflows, processes, and features that make Sage Intacct Construction so powerful.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
- Identify additional products that integrate with Sage Intacct Construction and Real Estate.

Sage Intacct Construction Reporting Options
CPE Credits: 1.5
Knowledge Level: Intermediate
Who Should Attend/Relevant Software: Attendees interested in learning about the reporting options available with Sage Intacct Construction and gain insight on data and reporting best practices.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
- Identify reporting options for Sage Intacct Construction.

Is Sage Intacct Construction Your Next Construction Solution? – REPEAT SESSION
Knowledge Level: Beginner to Intermediate
Who Should Attend/Relevant Software: If you’ve never seen Sage Intacct Construction or you’re curious about it as a construction solution, this session is for you. Join us for an introduction to the product, to learn about the progress we’ve made since the last TUG conference, and to hear about upcoming features.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
- Describe recently added construction features.
- Determine whether Sage Intacct Construction is part of your company’s move to the cloud.
- Contact the appropriate people when you have an interest in Sage Intacct Construction.

Pre-Construction Options for Sage Intacct Construction
CPE Credits: 1.5
Knowledge Level: Beginner to Intermediate
Who Should Attend/Relevant Software: Attendees who want to learn about the pre-construction options and solutions for Sage Intacct Construction.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description:
After participating in this session, you will be able to...
- Describe Sage Estimating as a pre-construction solution for Sage Intacct Construction.
- Compare functionality in various pre-construction solutions for Sage Intacct Construction.

Track 25: Vendor Solutions

Cabbage Will Simplify Your Project Forecasting & WIP Schedule Creation, for Both Sage 300 CRE & Sage 100 Contractor
Presenter: Joe Parton, Cabbage Software
Knowledge Level: Basic, Intermediate, Advanced
Who Should Attend: Owners, Controllers, Accounting and Project Managers, including Operation Managers
Prerequisites and/or Advance Preparation: Basic knowledge of projecting job cost to complete/job cost at completion and Work in Progress reporting.

Learning Objectives/Description: This class will demonstrate how Cabbage Software will simplify your project forecasting and WIP Schedule creation, for both Sage 300 CRE and Sage 100 Contractor. You will see how Cabbage streamlines this burdensome process:

1. A single point where all construction project changes can be managed quickly and efficiently.
2. Being a cost effective, time saving resource to manage projects.
3. Enabling real time data manipulation and generating immediate updates for review.
4. Automatically generating an accurate WIP Schedule ready for internal and external use.
5. Reconcile WIP to Income Statement.
7. Allowing the recording of comments and notes.
8. Managing subcontract buyouts and viewing commitments.
9. Being able to drill down and view actual cost transaction level entries.
10. Export WIP Schedule to Excel for What If Situations.
11. QUIK-WIP for Time and Material Projects.
12. Year-End WIP Automation.

Staying in the Boundaries of Updated Code - Avoiding Unnecessary Fines and Penalties
Presenter: Mike Merrill, Ron Babich, Frank Di Lorenzo, AboutTime Technologies/WorkMax
Knowledge Level: Basic
Who Should Attend: Payroll, Administrative Staff, CFO, Controllers, HR, Field Managers, Project Managers, Foreman, Field Personnel, Owners, Accounting Staff and anyone interested in being compliant with new regulations.
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: The regulations and laws surrounding construction projects are constantly adapting to new environmental and regulatory changes. Keeping up with all of those changes can add unnecessary stress for contractors already managing complex projects in our current environment with already thin margins. In this session, our panel will take a number of new requirements from around the US and walk through what each change means for your job site. Both inside the rule’s jurisdiction and the implied issues that the regulation is attempting to correct. So even if the law doesn’t apply to you in your home state, you can avoid the issue today and be ready for similar local regulations in the future. We will review extended time limitations on complaint notices, increasing sustainability requirements, new subcontractor payment requirements and several other issues. As we review each change, the panel will also walk through the technology and processes that can be used today to avoid fines, delays to approvals, and other profit-erasing consequences.

In this session, attendees will learn the following:
1. New and updated laws and regulations put recently into place across the country and why they matter to those inside and outside of their jurisdiction.
2. The implied goal of each regulation and how it can impact the bottom line.
3. The technology and processes available to ensure compliance with new regulations while protecting profits from fines, fees, and delays with reports and data that are easy to use and will also hold up in legal proceedings.

Complete Purchase to Pay Automation from TimberScan now includes Lien Waiver Management!
Presenter: Mark Carbino, Senior Product Director at AvidXchange
Knowledge Level: Basic
Who Should Attend: Any attendee interested in learning about AP automation integrated with Sage
Prerequisites and/or Advance Preparation: None
Learning Objectives/Description: It has always been the goal of AvidSuite for Construction’s TimberScan solution to eliminate manual work and create efficiencies within every step of the purchase to pay process. With the latest addition of our lien waiver management module, it’s easier than ever to keep projects on track and with accurate...
reporting, so you can maintain excellence even with an increasing workload. In this session, AvidXchange Senior Product Director Mike Carbino will walk you through how to leverage TimberScan’s latest technologies, including lien waiver management, OCR automation, and advanced purchasing, from anywhere.

**Better Together - Payroll, People, and Time for Sage 300 Construction and Real Estate (CRE) by Workforce Go!**
**Presenter:** Jessica Morency, Workforce Go!
**Knowledge Level:** Basic
**Who Should Attend:** All
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** Join Workforce Go!’s Jessica Morency for dive into Workforce Go! HCM Payroll, HR, and Time management for Sage 300 CRE and our industry-leading, real-time, bi-directional integration. In today’s environments, work is personal; during this session, organizations will learn how Workforce Go! HCM creates more connected, relevant, and meaningful work experiences for their people, enabling them to ensure they have the right people at the right time and communicate efficiently and effectively optimization of resources, leveraging a modern solution, and improved profitability and growth.

**The Financially Savvy Contractor in 2023 – Presented by Prophix**
**Presenters:** Daniel Fellows & Sahil Datta
**Knowledge Level (basic, intermediate, advanced):** Intermediate (Understanding of basic Joc Cost Accounting and Financial Statements)
**Who Should Attend:** CFO, Controller, Financial Analysts, Project Managers
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** In an environment of rising rates, sticky inflation and a pending recession, the ability for contractors to remain profitable is more difficult than ever. Contractors need the ability to analyze critical data points and create a strong financial plan that is both reliable and robust.
In this session, Prophix will review reporting and planning best practices that have been proven to help contractors become more profitable and improve their decision making. We will explore topics such as:
- Dynamic Work-In-Process (WIP) Reports
- Job Cost Forecasting
- Cash Flow Planning

Once you have completed this session, you will be in much better position to understand how you can improve your current processes and gauge the impact the right technology can have on your organization.

**Transition to the Cloud with TimberScan Titanium, purpose-built for Sage Intacct**
**Presenter:** Mark Carbino, Senior Product Director & Lee Ann Osganian, Account Executive at AvidXchange
**Knowledge Level:** Basic
**Who Should Attend:** Anyone attendee interested in learning more about the move to the cloud (Sage Intacct and TimberScan Titanium)
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** TimberScan Titanium for Sage Intacct has the same seamless integration you love from TimberScan for Sage 300 CRE – but on a cutting-edge cloud-based platform. Learn more about what TimberScan Titanium can offer when you decide to move to Sage Intacct, and how you can preserve your data when you do it.

**Missing Link: Using Construction HR Tech to Solve Today’s Workforce Challenges**
**Presenter:** Bryan May, Arcoro
**Knowledge Level:** All skill levels are welcome
**Who Should Attend:** CFO, Controller, Payroll, HR
**Prerequisites and/or Advance Preparation:** None
**Learning Objectives/Description:** While some companies are already leveraging construction technology to enhance their workflow, process and project management, others still haven’t considered the importance of people management solutions. Integrating the right HR software into your tech stack and leveraging technology can help you better manage your workforce more effectively and efficiently to drive your bottom line. Join this
session to learn more about Arcoro’s integration with Sage 300 CRE and discover the impact of an integrated, modernized HR management approach to foster company growth and employee engagement.

**Speed up Payroll Time Collection and AP Document Approval Processes with hh2**

**Presenter:** Kevin Hadley  
**Knowledge Level:** Basic  
**Who Should Attend:** Construction Companies Looking for a Time & Attendance and/or an AP Automation Solution  
**Prerequisites and/or Advance Preparation:** None  
**Learning Objectives/Description:** Find out how you can substantially reduce the time it takes to collect time for payroll, process invoices, manage credit card transactions, approve reimbursements, and more.

**AP Document Coding, Routing, and Approval**  
Do you need document routing & approval software to enable construction contractors to streamline the financial document management process, from receipt to coding to approval and fulfillment? By leveraging hh2, bring your entire document management process online; you’ll have greater visibility into the actual financial status of each project and increase your cash flow through more accurate and up-to-date progress billing.

- Automated document routing and approval system that’s fully integrated with your construction ERP system, making tracking and coding invoices a breeze  
- The workflow engine supports configurable approval paths with automated job roles, decisions (amount & coding), and email notification tasks  
- Payment apps are included along with a vendor portal for subcontractors to assist with payment app creation, update the schedule of values, add supporting documentation, and update compliance  
- Fully automated AP routing and approval system that includes support for invoices, credit card transactions, reimbursements, payment apps, and more  
- Full visibility for credit card transactions from the point of purchase through automated matching with credit card statements to import into accounting

**Time Tracking and Attendance**  
Do you want time collection software to enable faster, easier, and more accurate time entry, allocation, and approval for a speedier, more efficient payroll process? Get more comprehensive visibility into your true labor costs, helping you manage the financial risk to your organization and break away from the manual systems that are holding you back.

- Best-in-class integration ensures seamless data flow between disparate systems and eliminates manual data entry, enhancing efficiency and reducing the risk of error.  
- By eliminating waste with proven and reliable automation, hh2 customers have reduced the time it takes to process payroll down to as little as 2 hours per week. With less time and money tied up in managing the administrative aspects of paying your employees, you and your team can focus more on growing your business and delighting your customers.  
- Multiple time entry methods for individual employees, crews, job-hopping employees, and batch entry dramatically simplifies and speeds up employee time collection. Cloud connectivity means no more tedious trips into the office just to drop off time sheets.  
- Built specifically to meet the needs of construction companies with support for all key coding practices, including Job costing, certified payroll, unions, and more. In addition, support for 90+ approval levels, job roles, passive approval, report viewers, and custom permissions at each level are all included.

**Creating a Future-Focused Organization: Capitalizing on the Intersection of Business Transformation and Cybersecurity – Presented by Swizznet**

**Presenters:** Bob Hollander & Sam Schuemacher  
**Knowledge Level:** Basic  
**Who Should Attend:** Everyone  
**Prerequisites and/or Advance Preparation:** None  
**Learning Objectives/Description:** The pace of adoption around technology and business has skyrocketed over the last couple of years and while this evolution has created vast opportunity; it has also produced equally important
growing pains and gaps to fill. The need and desire for more flexibility across business and work means moving to the cloud. It’s no longer as simple as deciding on a business model and searching for the technology that makes that model efficient and effective. Now, the technology itself is dictating how things run, most notably around security and risk management with the heavy adoption of SaaS being seen across the industry.

If you want to...
- Learn how to uplevel the maturity of your IT strategy and your cybersecurity posture
- Ensure you are one step ahead of bad actors, and have a plan for when you’re not
- Gain competitive advantage in your market

We will be discussing...
- Business evolution: how far we’ve come and where things are headed
- Modern collaboration: the shift of hybrid work / work from anywhere culture
- Staying ahead of the curve: proactive changes to make
- Cybersecurity: managing risk and ensuring on time delivery of services to your customers

**Payroll Challenges Don’t Have to be Overwhelming – Presented by ADP**

**Presenters:** Felipe Gonzales-Paul, ADP  
**Knowledge Level:** Basic  
**Who Should Attend:** Open to all attendees  
**Prerequisites and/or Advance Preparation:** None  
**Learning Objectives/Description:** Time tracking. Prevailing wages. Certified payroll reporting. There are plenty of challenges when it comes to payroll and compliance in the construction and real estate industries. ADP’s compliance solutions help Sage clients manage compliance risk and reduce the manual workload of payroll teams. ADP has fully outsourced payroll and standalone compliance solution integrations across all Sage technology platforms.

ADP shares thousands of mutual clients with Sage’s construction industry-focused solutions and ADP’s industry-leading HCM solutions. With the Contractor Central cloud-based data integration solution, ADP can keep you compliant on your government-funded projects by automating wage decisions and government reporting for employees working on a mix of private, public and union jobs.

This session will address the ways that ADP can help with setting up contracts correctly to facilitate contract compliance through:
- Project and Contract Rate Maintenance
- Wage Determination
- HCM and ERP Integration
- Certified Payroll Reporting
- Compliance solutions for employment tax, wage payments and wage garnishments

**An AED for Your ERP | Re-establish Effective Reporting & Shock Your Data with ADC! - Presented by Anterra Technology**

**Presenters:** Michelle Jardin & Maggie Britt  
**Knowledge Level (basic, intermediate, advanced):** Basic, intermediate, intermediate & advanced  
**Who Should Attend:** CFO, Controller, Director of IT or Systems Administrator, VP of Construction  
**Prerequisites and/or Advance Preparation:** All Sage 300 Construction and Real Estate Users. Those with a need for speed when it comes to data retrieval and reporting. Users looking for a partner to migrate their legacy system to the next generation cloud-based ERP, Sage Intacct construction.  
**Learning Objectives/Description:** Generating accurate and timely reports is crucial for your organization’s success. As your company grows, your Data grows with it and as a result, you may have encountered challenges in accessing and retrieving data for financial reporting. Are you starting to feel like the heart of your ERP is slowly fading? Are you starting to plan for its retirement? Is there a cure for your data inconsistencies? How will you migrate your historical data to your new system? Think of Anterra as the ERP Emergency hotline. We are the AED to your ERP and can shock your data back
to life, provide advanced reporting analytics and support your data’s transition into its future environment. Today we offer 3 healthy solutions to ensure peak performance throughout your ERP Journey.

**Procore’s Integration with Sage Construction Best Practices**

**Presenters:** Chris Waymire, Sr. Product Specialist, Jeffrey Nesbitt - Sr. Manager, Global ERP Alliances & Partnerships  
**Knowledge Level:** All.  
**Who Should Attend:** Prospects and Current users.  
**Prerequisites and/or Advance Preparation:** None.  
**Learning Objectives/Description:** In this session, we will speak on the value of integrating Procore with Sage Construction (100, Intacct, 300 Cre). We will also cover the best practices and how to best utilize the different options available for syncing your Budget, Prime Contract, Commitments and Change Orders and more. Need the most up to date job cost details readily available? Learn how to enable Job To Date Cost Detailed Transactions for Sage 100, Intacct and 300 CRE to access information directly from your Procore's budget.