



**Timberline Training Classes
August – December 2008**

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**The All New Lunch & Learn Training Sessions
August – December 2008**

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**The Synergy Timberline User Forums
Thursday October 16th 2008**



Welcome to the Synergy Training Guide for the second half of 2008.

The response and feedback from the sessions in the first half of the year has been excellent. In a bid to further increase the information sharing we have introduced a new session format which we conduct for the next five to six months and continue if successful.

New Sessions – “Lunch & Learn”

We have introduced a new training format “Lunch & Learn”. These web based sessions will be held over lunch time, using a web meeting format. You simply grab some lunch, sit at your desk, call the 1800 number, watch and learn. To commence this format we are starting with Crystal Beginners and Crystal Advanced. Each course will be held over six weeks, midday’s on Tuesdays. See further details below.

Two additional courses in the standard format are:

- Timberline IT Administrators
- BuilderMT WMS Purchasing

Cancelled Sessions:

For the first half of the year several training sessions were cancelled due to poor attendance, unfortunately we need a minimum of four attendees to be able to run the training.

In the future we will try to avoid cancelling sessions by offering cancelled courses as Lunch & Learn sessions. As discussed above this format is not conducive to all training classes and therefore we may still need to cancel the training, however we will try to work directly with those interested in cancelled session and liaise to have multiple “Lunch n Learn” sessions.

How to enrol in Training and Lunch & Learn Sessions:

1. Print the final page of this training course guide.
2. Mark on the fax return page which courses you and your team would like to register for.
3. Fax training enrolment form to 039 431 4088
4. Upon receipt of the fax return, we will forward an invoice dated for your course(s), as acceptance and confirmation.

Please note due to booking of facilities and catering any cancellations will require at least 24 hours notice, a 25% booking fee will be charged. Non attendance on the day will require full payment.

Format for Sessions:

Class Room Training:

Class room training is held in a computer lab in Melbourne City. The Clifton Computer Laboratory provides individual PC's for each attendee, operated in a theatre style training. All materials, workbooks and computers will be supplied, as will morning tea and lunch as required in all day sessions. Clifton's is located at:

Cliftons – Room to Learn
Level 1, 440 Collins Street
Melbourne VIC 3000

** We reserve the right to cancel any course if minimum of 4 attendees do not registered.

Costs for class room training: Half day course (4hrs): \$480 ex gst, Full Day (7hrs): \$695 ex gst.

Lunch & Learn Sessions:

Specifically introduced for the time poor users and IT Managers. Shorter training sessions, going for one hour only, these courses will be held over six weeks. So to get on board, enrol today, then grab some lunch, lock your office door, call the 1800 number, sit down in front of the PC and open the mind, to the intricate components of Timberline and Crystal.

When sessions are to start you will be contacted with a web address and the 1800 number to dial for the conference call. Once you are logged in just sit back and relax. All training materials will be forwarded via email.

Costs for Lunch n Learn Class, six week training course \$ 800 ex. gst.

User Forums

Once again our User Forum will be held at:

The Australia Institute of Management (AIM)
181 Fitzroy St
St Kilda VIC 3181

Dates: **Thursday October 16th 2008**

Cost: Free of charge for all Timberline Users

Starts: 9am.

The agenda for this half day session (followed by a light lunch) is to give you (Timberline Users) an overview and understanding of the future developments, upgrades, enhancements and changes happening to Sage Timberline Office and associated add in modules into the short term future.

This is a fantastic forum for requesting enhancement requests, networking and talking with other Sage Timberline users. We recommend that every company is represented at the forum sessions as the topics discussed are often invaluable in overall understanding and vision of the Sage Timberline product.

TRAINING ENROLMENT FORM

Please fax to Synergy on 03 9431 4088

Company Name: _____

Primary Contact: _____

Date	Duration	TIMBERLINE TOPIC (Summary No#)	YOUR DETAILS
Tue 19th Aug	7hrs	Job Costing	No# Attendees: Names:
Tue 26st Aug	7hrs	General Ledger \ Financial Statement Designer	No# Attendees: Names:
Tue 2nd Sept	7hrs	Payroll	No# Attendees: Names:
Wed 3rd Sept	1 hrs x 6	Lunch 'n' Learn – Crystal Beginners	No# Attendees: Names:
Tue 9th Sept	7hrs	Crystal for Sage Timberline (Beginners)	No# Attendees: Names:
Tue 16th Sept	7hrs	Accounts Payable	No# Attendees: Names:
Thur 18th Sept	7 hrs	Cost Estimating	No# Attendees: Names:
Tue 23rd Sept	7 hrs	BuilderMT – WMS - Purchasing	No# Attendees: Names:
Tue 30th Sept	7 hrs	Project Management – Documents	No# Attendees: Names:
Tue 7th Oct	7 hrs	Report Designer	No# Attendees: Names:
Tue 14th Oct	7 hrs	Purchasing	No# Attendees: Names:
Thur 16th Oct	4hrs	Synergy Timberline User Forum	No# Attendees: Names:

Tue 21st Oct	7 hrs	Project Management –Contracts	No# Attendees: Names:
Wed 22nd Oct	1 hrs x 6	Lunch `n` Learn – Crystal Advanced	No# Attendees: Names:
Tue 28th Oct	7 hrs	Estimating – Database Builder	No# Attendees: Names:
Tue 11th Nov	7 hrs	Crystal Reports – Job Cost, AP (Advanced)	No# Attendees: Names:
Tue 18th Nov	7 hrs	Sage Timberline Inventory	No# Attendees: Names:
Thur 20th Nov	7 hrs	Crystal Reports – Project Management	No# Attendees: Names:
Tue 25th Nov	4 hrs	Sage Timberline Desktop	No# Attendees: Names:
Tue 2nd Dec	4 hrs	Billing Module	No# Attendees: Names:
Thur 4th Dec	7 hrs	Property Management	No# Attendees: Names:
Thur 27th Nov	7 hrs	Payroll	No# Attendees: Names:
Tue 9th Dec	7 hrs	IT Administrator (Advanced)	No# Attendees: Names:
Thur 11th Dec	7hrs	Service Management	No# Attendees: Names:

Training Course Overviews:

1. Sage Timberline - Job Costing

Duration: 4 hrs

Topics covered:

- Job Costing Workflow
- Creating Jobs and Job Numbering
- Billing Structures \ Contracts
- Job Cost Settings
- Job Cost interaction with Project Management
- Using Worksheets
- Setting Activities and Cost codes
- Job Cost Reporting

2. Sage Timberline - General Ledger \ Financial Statement Designer:

Duration: 7 hrs

Topics covered:

- General Ledger Workflow
- Overview of General Ledger Settings
- Setting up Accounts
- Cash Management Workflow
- Cash Management Settings
- Setting Up Journals and recurring entries
- Completing a bank reconciliation
- Understanding GL fields
- Creating Financial Statements
- Presenting your financial statements

3. Lunch 'n' Learn - Crystal Beginners (Understanding the Data)

Duration: 1 hour x 6 Sessions

Session Topics Covered:

- Creating Crystal Links
- Crystal Groups and Sorting
- Basic Formulas
- Crystal Parameters, Conditioning Data
- ODBC, Setting up ODBC & DSN's
- Integrating to the Address Book GUI
- Using Address Book fields in your crystal reports

4. Sage Timberline - Payroll

Duration: 7 hrs

Topics Covered:

- Payroll Workflow
- Integrating Payroll with the General Ledger
- Grouping Employees
- Setting up an employee
- Payroll processing
- Printing (modifying) forms and reports
- Printing Cheques and processing EFT

5. Crystal for Sage Timberline (Beginners)

Duration: 7 hrs

Topics Covered:

- Crystal design basics
- Creating ODBC Connections to Timberline data
- Inserting objects into a report (database fields & text objects)
- Creating, modifying and using: Report Parameters
- Sorting and Grouping your report data

6. Sage Timberline - Accounts Payable

Duration: 4 hrs

Topics Covered:

- Accounts Payable Workflow
- Invoice processing
- Posting invoices
- Paying and crediting invoices
- Cheque Processing
- Accounts Payable Reports

7. Sage Timberline – Cost Estimating

Duration: 7 hrs.

Topics Covered:

- Configuring and setting up Sage Timberline Estimating.
- Using Quick and Item Takeoff
- Assembly Takeoff
- Configuring your spreadsheet
- Reports

8. BuilderMT Workflow Management Suite – Purchasing

Duration: 7 hours

Topics Covered:

- Setting up WMS Purchasing
- Creating the price book and vendor pricing structure
- Requesting and recording supplier quotes
- Raising Purchase Orders
- Raising Changes (Order Variations)
- Approving orders for payment

9. Sage Timberline - Project Management – Document Control

Duration: 4 hrs

Topics Covered:

- Project Management Workflow
- Setting up jobs
- RFI Workflow
- Transmittals
- Contract controls

10.Sage Timberline Report Designer

Duration: 4 hrs

Topics Covered:

- Understanding Timberline Data Structure
- How to plan a report
- Inserting Object into your report
- Creating Functions
- Adding reports to your menu

11.Sage Timberline - Purchasing

Duration: 7 hrs

Topics Covered:

- Purchasing Workflow
- Purchasing Data concepts
- Understanding purchasing codes
- Purchasing setup and setting
- Creating Requisitions and Purchase Orders
- Creating Variations
- Receiving goods and entering costs
- Reporting

12.Sage Timberline - Project Management – Contract Control

Duration: 4 hrs

Topics Covered:

- Project Management Workflow
- Commitments
- Estimate control
- Forecasting
- Variation Management

13.Sage Timberline - Estimating – Database Building

Duration: 7 hrs

Topics Covered:

- Configurations of database
- Phase structures
- Item Formulas
- Assembly Creation
- Formula and item tables

14.Crystal Reports – Job Cost and Accounts Payable Data (Advanced Crystal)

Duration: 7 hrs

Topics Covered:

Prerequisite is Crystal for Sage Timberline (introduction)

- Review of the Crystal Workflow
- Analysis of Timberline Job Cost data tables
- Establishing links and relationships between tables
- Advanced Crystal features
- Practical examples and hands on training

15.Sage Timberline – Inventory

Duration: 7 hours

Topics Covered:

- Inventory Data & Workflow
- Inventory Setup, Classes & Locations
- Inventory Movements and Purchasing
- Stock takes, returns & transfers
- Inventory Reporting

16.Crystal Reports for Project Management

Duration: 7 hours

Topics Covered:

Prerequisite is Crystal for Sage Timberline (introduction)

- Review of the Crystal Workflow
- Analysis of Timberline Job Cost data tables
- Establishing links and relationships between tables
- Advanced Crystal features
- Practical examples and hands on training

17.Sage Timberline Desktop

Duration: 4 hrs

Topics Covered:

- Introduction to Sage Desktop
- Setting up your free Sage Timberline desktop
- Setting up dashboards
- Customising the desktop
- Creating shortcuts and adding external applications to the Sage Timberline desktop.

18.Lunch 'n' Learn - Crystal Advanced (Making your reports look fantastic)

Duration: 1 hour x 6 Sessions

Session Topics Covered:

- Design Fundamentals, Formatting and Grids
- Sorting, Grouping and Drill Downs based on parameters
- Formatting using groups and summaries
- Creating powerful formulas and hyperlinks
- Using Functions, Special Characters in your reports
- Making the report standout with Graphs & Charts
- Incorporating Sub reports and drill downs into your report.
- Creating Timberline Desktop Reports.

19.Billing Module

Duration: 4 hrs

Topics Covered:

- Billing module workflow
- Analysing billing information
- Preparing progress claims
- Cost Plus and "Quick Bill" invoices
- Billing setup options.
- Creating your invoice

20. Property Management

Duration: 7 hours

Topics Covered:

- Introduction to Property Management
- Setting up and defining charge types (integration to GL)
- Creating properties, units, tenants and leases
- Charges – Managing the billing and costs of your property
- Property Management Reporting

21. Sage Timberline – IT Administrator (Advanced)

Duration: 7 hours

Topics Covered:

- Security and adding new users
- Pervasive Database (Access to Data, File Structures)
- Setting up Backups and Restoring files
- Workstation Installs
- Troubleshooting

22. Sage Timberline Service Management

Duration: 7 hours

Topics Covered:

- Introduction to service management
- Navigation and setup of service management
- Creating new service requests
- Scheduling service requests
- Creating Maintenance Contracts
- Closing and Invoicing service requests
- Service Management Reporting

23. Lunch 'n' Learn - Crystal Advanced (Making your reports look fantastic)

Duration: 1 hour x 6 Sessions

Session Topics Covered:

- Design Fundamentals, Formatting and Grids
- Sorting, Grouping and Drill Downs based on parameters
- Formatting using groups and summaries
- Creating powerful formulas and hyperlinks
- Using Functions, Special Characters in your reports
- Making the report stand out with Graphs & Charts
- Incorporating Sub reports and drill downs into your report.
- Creating Timberline Desktop Reports.

