



Sage Timberline Office Training February – July 2008

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Synergy Timberline User Forums March 7th & July 4th 2008

Training:

Welcome to the Synergy 2008 Training Guide. As you will see we have scheduled many courses throughout the next six month, however should there be a topic you wish to be included please contact gerard@synergy-group.com.au with the details and we will try to accommodate your training requirements.

All training is to be held at:

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

All materials, workbooks and computers will be supplied

All training courses commence at 9.00am sharp!

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

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

How to enrol in training courses:

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.

Timberline User Forums

**** Announcing two user forums in the first half of this year ****

These will be held at the Australia Institute of Management (AIM)
181 Fitzroy St
St Kilda VIC 3181

Dates: **Friday March 7th 2008 & Friday 4th July 2008**

Cost: Free of charge for all Timberline Users

Starts: 9am.

The agenda for these half day sessions (followed by a light lunch) are to give you 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.

These sessions have been a fantastic forum for 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 Course Overview:

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

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

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

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

Crystal for Sage Timberline (introduction)

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

Crystal Reports – for 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

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

Sage Timberline - Estimating

Duration: 7 hrs.

Topics Covered:

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

Sage Timberline - Estimating – Database Building

Duration: 7 hrs

Topics Covered:

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

Sage Timberline - Project Management – Document Control

Duration: 4 hrs

Topics Covered:

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

Sage Timberline - Project Management – Contract Control

Duration: 4 hrs

Topics Covered:

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

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

Sage Timberline - Payroll (Advanced)

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

Payroll Year End

Duration: 4 hours

Topics Covered:

- Overview of Payroll Year End
- Printing End of Year Reports
- Backing Up and Installing Backup as data file
- Printing Payroll Summaries
- Creating files for government
- Installing new tax tables
- Preparing new financial year

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.

Sage Timberline 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

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

Sage Timberline – 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

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

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

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TRAINING ENROLMENT FORM

Please fax to Synergy on 039 431 4088

Company Name: _____

Primary Contact: _____

DATE	Duration	TIMBERLINE TOPIC	YOUR DETAILS
Thur 7th Feb	7hrs	Job Costing	No# Attendees: Names:
Thur 14th Feb	7hrs	General Ledger \ Financial Statement Designer	No# Attendees: Names:
Thur 21st Feb	7hrs	Payroll	No# Attendees: Names:
Thur 28th Feb	7hrs	Crystal for Sage Timberline (Beginners)	No# Attendees: Names:
Thur 6th Mar	7hrs	Accounts Payable	No# Attendees: Names:
Fri 7th Mar	4hrs	Synergy Timberline User Forum	No# Attendees: Names:
Thur 13th Mar	7 hrs	Estimating	No# Attendees: Names:
Thur 20th Mar	7 hrs	Project Management – Documents	No# Attendees: Names:
Thur 27th Mar	7 hrs	Report Designer	No# Attendees: Names:
Thur 3rd Apr	7 hrs	Purchasing	No# Attendees: Names:
Thur 10th Apr	7 hrs	Project Management –Contracts	No# Attendees: Names:
Thur 17th Apr	7 hrs	Estimating – Database Builder	No# Attendees: Names:

Thur 24th Apr	7 hrs	Crystal Reports – Job Cost, AP (Advanced)	No# Attendees: Names:
Thur 1st May	7 hrs	Sage Timberline Inventory	No# Attendees: Names:
Thur 8th May	4 hrs	Sage Timberline Desktop	No# Attendees: Names:
Thur 15th May	4 hrs	Billing Module	No# Attendees: Names:
Thur 22nd May	7 hrs	Property Management	No# Attendees: Names:
Thur 29th May	7 hrs	Payroll	No# Attendees: Names:
Thur 5th June	7 hrs	IT Administrator (Advanced)	No# Attendees: Names:
Thur 12th June	7 hrs	Payroll Year End	No# Attendees: Names:
Thur 19th June	7hrs	Service Management	No# Attendees: Names:
Thur 26th June	7hrs	**no session booked yet ** (details to be announced)	No# Attendees: Names:
Thur 3rd July	7hrs	**no session booked yet ** (details to be announced)	No# Attendees: Names:
Fri 4th July	4hrs	Synergy Timberline User Forum	No# Attendees: Names: