
Seminar / Class List

Advanced Job Setup and Work Flow

(Double Session) – Josh Stearns

Great news for estimators and project managers! If you thought AccuBuild was just a job cost accounting package, think again! AccuBuild has all the features you need for automating the job setup process directly from your job estimates whether you are using Excel, OnCenter, or some other third party estimating software. This class will teach you all you need to know for integrating your estimated costs and bid items directly with AccuBuild for tracking job cost estimates vs. actual costs, schedule of values for contract billings, and bill of materials and buyout items. In addition, we will be covering advanced options for grouping estimate items and billing items as well as automating the sub payment process by linking subcontract items to a schedule of values.

Advanced Job Cost Tracking & Cost Analysis

(Double Session) – Josh Stearns

Are you using the job cost tracking tools in AccuBuild to their fullest potential? Did you know that AccuBuild has a full menu of features for managing and tracking projects from the original estimate to the final dollar spent on the job? In today's tough economy, you need to be as competitive as possible. Learn how AccuBuild can give you a competitive advantage by allowing you to efficiently track job cost and by providing the cost analysis needed to make informed day to day decisions. This class is targeted towards owners, project manager and others who are involved in the daily management of construction projects. Topics will include software tools available for tracking production units, purchasing and tracking buyout items for materials, and cost to complete forecasting. In addition, key cost analysis reporting will be covered as well as the major advantages of integrating the project scheduling features of the AccuBuild System with the job cost accounting features.

Project Management – Best Practices

(Single Session) – Josh Stearns

The AccuBuild Project Management Module has a host of features and options which a lot of our users simply don't know about. Because this module has so much flexibility in order to handle a variety of contractor needs, it is very easy to settle in and use just the basic features of this powerful package. This class is designed for project managers to educate you on the best practices of using the PM Module in AccuBuild. You will learn the basic setup options, as well as the best practice for managing the PM Logs including RFIs, Change Order Tracking, Submittal Tracking, producing Daily Reports etc. We will also cover all the various integration tools that we have developed that work directly with the Microsoft Office suite of products including Word, Excel, and Outlook. Finally, we will cover the document management integration with the AccuBuild Document Management System (ADMS) and how you can create your own custom Project Management Forms from the AccuBuild Forms Library.

Document Management - Best Practices

(Single Session) – Josh Stearns

Have you ever gone to the file cabinet to look for something and couldn't find it because the folder was on someone's desk, or out in the field? Looking for documents, invoices, contracts etc. is very time consuming and can be very frustrating, especially when they are missing or misfiled. The AccuBuild Document Management System (ADMS) can take away all the pain of managing documents, and ADMS is not limited to just scanned images, ADMS can manage any type of file including: emails, PDFs, Word Documents, Excel Spreadsheets, pictures, plans and so much more. The AccuBuild Document Management System is so powerful and yet so easy to use that it's hard to put into words all that it can do. If you are not using ADMS or are not familiar with what it can do, then this class is for you. Find out what all the excitement is about the ADMS Explorer Window and how it works with the Microsoft Explorer Window. This class is targeted for anyone who uses AccuBuild, and if you are not moving towards a paperless office yet, you need to be soon before your competitors pass you up.

My AccuBuild Reports – A Guided Tour

(Double Session) – Mike Stearns Sr.

My AccuBuild Reports (aka "MAR") gives end users the power to modify existing reports and forms to fit the exact specifications and needs of your company. From simple cosmetic changes to full blown report designs from scratch, the sky is the limit when it comes to designing reports with AccuBuild. This course is designed for owners, project managers and controllers as a guided tour of what MAR can do for your organization. This is not a "how to" course but rather a "look under the hood" to show you the power of MAR and the endless list of features. If you've been told that the report you need can't be done, or if you are currently using several spreadsheets and/or reports to track data for managing your operation, then you need to attend this class and let us show you the power that you have with AccuBuild.

My AccuBuild Reports – Introduction to Report Design

(Double Session) – Mike Stearns Sr.

This course will teach end users the basics of report design using My AccuBuild Reports. Topics will include the basic components of all report design including data selection and relational data concepts, report layout and cosmetic design tools, and report previewing and output options including integration with the AccuBuild Document Management System (ADMS). This is a beginner's class designed for all users of AccuBuild. At the completion of this class, you will be able to create custom forms and reports using existing designs from the AccuBuild MAR Report Library. In addition, you will be able to create simple report designs from scratch using the built-in data and report design wizards.

My AccuBuild Reports – Advanced Report Design

(Double Session) – Mike Stearns Sr.

This course is an advanced course on My AccuBuild Reports and is targeted for users who are already familiar with MAR or who have attended the “Introduction to Report Design” class. In this course we will dive in deeper into data design and report design. End users will learn:

- How the AccuBuild Database works with MAR
- How to use data views, create custom views, and variable data fields for prompting
- How to use the advanced report design tools
- How to build your own library of robust reports and forms
- How to make customized versions of forms and reports to make life much easier for the day to day operations of your company.

Our users have expressed so much interest in learning everything that MAR has to offer, and this class delivers all of that and so much more. In fact, there is so much depth to MAR and so many features available, that we will be using three training sessions to cover all of the material. So buckle up and hold on because you will be amazed at what you can do.

Advanced Cash Management Techniques

(Single Session) – Lisa Kinder

Tracking Cash and Projecting Cash Flow is a big deal, especially in the construction industry where you usually pay for expenses up front on labor and materials, and you don't receive your draw on the project for several weeks. Have you ever heard the saying “Cash is King” or “You have to live by the golden rule and the guy with the gold makes the rules”? Well these saying are very true and AccuBuild has several tools that are built especially for tracking and analyzing cash flow. In this class you will first learn how to reconcile your bank accounts. From there we will show you the reports you can use to project future cash flow to help you plan your cash requirements from month to month. Finally, we will teach you to look at your cash flow using different grouping methods so that you can recognize and take advantage of trends that are favorable to your company, such as cash flow by project type.

Advanced Accounting Methods for Payroll and Accounts Payable

(Single Session) – Lisa Kinder

For the accounting staff, the majority of time is spent handling payroll and accounts payable. This class will provide in-depth training on a variety of topics including certified payroll reporting (standard and custom formats), union / prevailing wage setup, historical rate tracking, along with advanced methods for tracking and processing vendor payments and associated documents such as insurance certificates, liens and releases, etc.

Advanced Reconciling & Reporting Techniques

(Single Session) – Lisa Kinder

Learn to reconcile your books just like a pro and keep your CPA and your bonding company happy. In this class, AccuBuild users will learn the procedures and benefits of the month end closeout process. Users will also learn how to quickly identify out of balance amounts using data inquiry and reporting tools, and how to reconcile the general ledger with the job schedule. Finally, users will learn how to “lock in” balances and the importance of data backup.

Processing Reversal and Correcting Entries

(Single Session) – Lisa Kinder

Have you ever made a mistake, but didn't discover it until after the posting process was complete? Once you discovered the problem, did you try to fix it on your own without calling support, only to find you made the problem worse? Do you want to learn how to correct it right the first time? If you answered yes to any of these questions, then this class is for you. In this class users will learn how to correct entries that are coded to the wrong job or account, entered with the wrong date, or simply need to be cancelled altogether. For those of you that never make mistakes, you can sit this one out.

Group Sessions

(Single Session) – Mike Stearns Sr

Just when you think your brain is ready to explode from all the knowledge you have gained, we will all join together for some final group sessions which will be more interactive and give us a chance to hear what's on your mind. These are always fun sessions and very informative. Here's what we will be talking about:

- **New Development:** We are currently working on a new “approval routing” option for processing vendor invoices and we want to show you how it works. This feature will allow you to route payable invoices directly to project managers, purchasing agents, and others in your company in order to get their approval and recommendations for payment. This new process will insure that invoices are not paid without approval and will handle the approval process in a “paperless” environment using ADMS. In other words, you will now be able to get invoices approved for payment without leaving your desk.
- **Tips, Tricks, & Shortcuts:** Sometimes it's the little things that make life easier. Join us in this session as we show you some shortcuts and tricks for working in the AccuBuild System. This session is always informative and even our most experienced users always learn something new.
- **Year in Review:** Every year we like to take a moment and look back at what has been accomplished. We are constantly updating and improving our product, and this is a chance for us to show you some new things that you might have missed. A big item that we accomplished this year is our new Scheduling Module and we'll be giving you a quick tour of what it can do. After discussing what has been done, we then open up a discussion for questions and answers and entertain ideas for our never ending development wish-list.