Managing Contracts in Primavera Contract Manager Rel. 12

This course provides hands-on training for Oracle Primavera's Contract Manager solution focusing on project cost control and document management. Additional topics include logging and tracking submittals, recording project communication, awarding procurement items, and using contracts, purchase orders, and trends. Numerous workshops reinforce new functionality and skills.

Course Length
3-day course

Prerequisites
Prerequisite: Functional knowledge of MS Windows and Internet Explorer PMI Program Number – 201

Course Content

INTRODUCTION TO CONTRACT MANAGER

Identify the advantages of using Contract Manager

Log in to Contract Manager

Identify Contract Manager's components in the Main window

Customize the Project View in the Main window

Customize the Control Center in the Main window

CREATING THE COMPANY DIRECTORY

Add a new company

Create contacts

Edit contact information

Distinguish between group and project contacts

Copy contacts from another project

Create distribution lists from contacts in project

Designate companies or contacts as inactive

CREATE A PROJECT

Create a project using the New Project wizard

TRACKING DRAWINGS

Review the distribution process

Record and view drawing logs

Create transmittals from distribution lists

Use the transmittal queue

Package a group of drawings as a set

Add multiple drawings to the drawing set

Distribute drawings to project participants

COMMUNICATING PROJECT INFORMATION

Create letter templates

Add letters

Document a telephone record

Enter a request for information

Record an answer to a request for information

LOGGING AND TRACKING SUBMITTALS

Document submittals and submittal packages

Assign a status to submittals

Identify the responsible person (Ball in Court)

Incorporate multiple reviewers in the cycle

Create transmittals from submittals

Use Dunning letters to notify parties

DOCUMENTING PROJECT ISSUES

Define an issue

Create an issue

Link documents and attachments to an issue

Document an issue by searching through project documents and attachments

RECORDING PROJECT COMMUNICATIONS

Create daily reports

Document daily progress

Generate daily reports and meeting minutes

Record and print meeting minutes

MANAGING PROJECT COSTS

Define the cost process in a project

View a cost coding structure

Define the Cost Worksheet

Explain how document values are distributed

View the source documents from a cost code

AWARDING PROCUREMENT ITEMS

Document bids

Compare bids

Award procurement items

USING CONTRACTS, PURCHASE ORDERS, AND TRENDS

Add contracts and purchase orders

Distribute document values to the Cost Worksheet

Use Trends to account for anticipated costs

CHANGE MANAGEMENT

Describe the change management workflow process

Define change management phases

Define the Project Settings for document flow

Create, link, and reference change documents

Trace estimated, quoted, negotiated, and final change values

PAYMENT REQUISITIONS

Determine requisition options

Generate a requisition from a contract

Create a schedule of values

Balance the requisition

Retrieve approved change orders

Record status for requisitions

Distribute actual costs to the worksheet

Certify and print requisitions

APPROVAL PROCESS

Set up an approval process

Configure the approval process for a document

Use the approval process

CUSTOMIZING LAYOUTS

Create a layout

Filter a layout

Sort a layout

Group a layout

Export logs to Excel

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