

INSIGHT INTRODUCTION COURSE

This course will cover the basic skills needed to utilize the Insight Business Platform. You will be introduced to concepts that are used through out the entire program. This course should be completed before any role-specific training.

TOPICS INCLUDED:

- ◆ Introducing Insight
- ◆ How to Take a Course
- ◆ How to Log Into Insight
- ◆ Module Overview
- ◆ A 1st Look / Basic Navigation
- ◆ Intro to Role Centers
- ◆ Intro to Financial Dimensions
- ◆ Sales and Use Tax Overview
- ◆ Getting Support and Using Communities of Practice

eLearning Module Time: 1.5 Hours

Prerequisite: None

PROJECT MANAGEMENT COURSE

This course is intended to introduce the Project Management role to Insight functionality.

TOPICS INCLUDED:

- ◆ PM Overview
- ◆ Set Up Project Budget: Fixed Price
- ◆ Set Up Project Budget Part 1
- ◆ Set Up Project Budget Part 2
- ◆ Create a Change Order
- ◆ Revise Project Budget
- ◆ Procure to Pay Process Overview
- ◆ Create a Purchase Requisition Part 1
- ◆ Create a Purchase Requisition Part 2
- ◆ Project Purchase Inquiries
- ◆ Request for Quote Part 1
- ◆ Request for Quote Part 2
- ◆ Create a Purchase Order Part 1
- ◆ Create a Purchase Order Part 2
- ◆ Transfer Material from Warehouse to Project
- ◆ Set Up Subcontractor
- ◆ Create Subcontractor Change Order
- ◆ Work With Subcontractor Submittals
- ◆ Process Subcontractor Invoice
- ◆ Receive Goods and Services
- ◆ Report Deliverable Completion
- ◆ Review Capture Time and Other Data
- ◆ Cost to Complete
- ◆ Zero Out and Finalize PO

eLearning Module Time: 5 hours 10 minutes

PROJECT PURCHASING

COURSE

This course is intended to introduce the Project Purchasing role to Insight functionality.

TOPICS INCLUDED:

- ◆ Procure to Pay Process Overview
- ◆ Create a Purchase Requisition Part 1
- ◆ Create a Purchase Requisition Part 2
- ◆ Project Purchase Inquiries
- ◆ Request for Quote Part 1
- ◆ Request for Quote Part 2
- ◆ Create a Job PO: Add a Line and Add an Item

eLearning Module Time: 1 Hour 20 Minutes



FIELD

COURSE

This course is intended to introduce the Field role to Insight functionality.

TOPICS INCLUDED:

- ◆ Introducing Insight
- ◆ How to Take a Course on a Mobile Device
- ◆ Entering Self Time in StaffRight
- ◆ Entering Crew Time in StaffRight

eLearning Module Time: 60 Minutes

ACCOUNTS PAYABLE (AP)

COURSE

This course is intended to introduce the accounts payable role to Insight functionality.

TOPICS INCLUDED:

- ◆ AP Navigation
- ◆ Create PO and non PO Vendor Invoices
- ◆ Enter Invoice Via Open Vendor Invoice
- ◆ Enter Invoice via Invoice Journal: Job Related
- ◆ Enter Invoice via Invoice Journal: Single / Multi Line
- ◆ Enter Invoice with Discount
- ◆ Enter Reoccurring Vendor Invoice with Template
- ◆ Process Payment: Check
- ◆ Process Payment: EFT

eLearning Module Time: 1 hour 45 minutes

ACCOUNTS RECEIVABLE (AR)

COURSE

This course is intended to introduce the Accounts Receivable role to Insight functionality.

TOPICS INCLUDED:

- ◆ Monitor Accounts Receivable*
- ◆ Create or Edit Customer
- ◆ Process Payments*
- ◆ Write off Process*
- ◆ Customer Statements*
- ◆ Payment Journal Process*
- ◆ Collections: Monitoring Collections
- ◆ Collections: Working with Aging Invoices
- ◆ Collections: Creating and Working With Collections
- ◆ Collections: Process NSF and Write Offs

BILLING FIXED PRICE

COURSE

This course is intended to introduce the Insight Billing (Fixed Price) role to Insight functionality.

TOPICS INCLUDED:

- ◆ Billing Navigation and Overview
- ◆ Create Billing Rules
- ◆ Update Billing Status/Project Completion
- ◆ Pro Forma Invoicing
- ◆ Finalize and Post Invoices
- ◆ Retention Invoicing
- ◆ Scan and Store Back Up Documentation
- ◆ Create Credit Note to Reverse Posted Invoice

eLearning Module Time: 1.5 hours

BILLING TIME & MATERIALS COURSE

This course is intended to introduce the Insight Billing (T & M) role to Insight functionality.

TOPICS INCLUDED:

- ◆ Billing Overview
- ◆ Adjust Transactions
- ◆ Create, Finalize and Post Invoices
- ◆ Retention Invoicing
- ◆ Scan and Store Back Up Documentation
- ◆ Create Credit Note to Reverse Posted Invoice

eLearning Module Time: 1 hour



PURCHASING

COURSE

This course is intended to introduce the Purchasing role to Insight functionality.

TOPICS INCLUDED:

- ◆ Procure to Pay Process Overview
- ◆ Create a Purchase Requisition Part 1
- ◆ Create a Purchase Requisition Part 2
- ◆ Purchase Inquiries
- ◆ Request for Quote (RFQ) Part 1
- ◆ Request for Quote (RFQ) Part 2
- ◆ Create a Purchase Order Part 1
- ◆ Create a Purchase Order Part 2
- ◆ Create a Job PO: Add a Line and Add an Item
- ◆ Receive Goods and Services
- ◆ Zero Out and Finalize PO
- ◆ Reporting and Inquiry—Purchase Order*
- ◆ Master Vendor Search
- ◆ Vendor Trade Agreements
- ◆ Address Damaged Delivers*
- ◆ Take Action on a Requisition*
- ◆ Process RFQ Responses*
- ◆ Address PO Discrepancies

INVENTORY

COURSE

This instructor-led course will introduce
Insight inventory functionality.

TOPICS INCLUDED:

- ◆ Inventory Introduction
- ◆ Receive Goods
- ◆ Correct Receipt of Goods
- ◆ Receive Material Against Transfer Order
- ◆ Atlas Upload
- ◆ Receive Sales Order Changes
- ◆ Ship Customer Order
- ◆ Complete Material Returns to Vendor
- ◆ Transfer Material to Project and Back From a Project
- ◆ Transfer Material from Warehouse to Warehouse

In-Person Class Time: 4 hours

PAYROLL

COURSE

This course is intended to introduce the Payroll role to Insight functionality.

TOPICS INCLUDED:

- ◆ StaffRight: Import Users In
- ◆ StaffRight: Add Users Manually
- ◆ StaffRight: Assign and Verify Accounts
- ◆ Create or Edit Jobs*
- ◆ Create or Edit Positions*
- ◆ Hire Union Employees*
- ◆ Edit Advances Payroll Positions—Non Union*
- ◆ Set Up Employee Benefits and Deducts—Non Union*
- ◆ Set Up Bank Information*
- ◆ Direct Deposit Maintenance*
- ◆ Edit StaffRight Position*
- ◆ Hire Union Employees*
- ◆ Edit Advanced Payroll Positions—Union*
- ◆ Add Multiple Occupations to a Worker Position*
- ◆ Employee Setup Options*
- ◆ Employee Maintenance (Union & Non)*
- ◆ Employee Maintenance for Levy, Garnish, Child Support*
- ◆ Schedule Employee Allowance*
- ◆ Credit or Edit Employee Entitlement*
- ◆ Process Payroll*
- ◆ Issue Payment*
- ◆ Generate Entitle*
- ◆ Close Pay Period*
- ◆ Terminate*
- ◆ Setup Payroll on Project
- ◆ Verify Employment*

ACCOUNTING

COURSE

This course is intended to introduce the Accounting role to Insight functionality.

TOPICS INCLUDED:

- ◆ Close out a Project
- ◆ Create Direct Deposit and Positive Pay Files
- ◆ Perform Bank Reconciliation*
- ◆ Process Bank Entries*
- ◆ Process Allocation Entries*
- ◆ Process General Journal Entries*
- ◆ Capitalize Assets from Projects*
- ◆ Create or Edit Fixed Asset*
- ◆ Dispose of Asset*
- ◆ Process General Journal Entries*
- ◆ Process Periodic Entries*
- ◆ Reconcile Sub-Ledgers*
- ◆ Recognize Revenue*
- ◆ Reporting and Inquiry– FR*
- ◆ Maintain Budgets*
- ◆ Create Job Transaction*
- ◆ Income Statement Balance Sheet*
- ◆ How to Run and Review a WIP Report*

ASTEIA 12.5 UPGRADE OFFICE COURSE

This course is intended to introduce the process changes associated with upgrading to Asteia version 12.5 from previous versions of Asteia.

TOPICS INCLUDED:

- ◆ Personalization Asteia
- ◆ Asteia / Integration with AX
- ◆ Service Order Set Up: S Type Jobs
- ◆ Invoicing
- ◆ How to Handle No More Private Activities
- ◆ Field Overview of Changes
- ◆ Service Order Set Up: P Type Jobs

eLearning Module Time: 2 hours 10 minutes

BUSINESS OPERATIONS/MANGAGEMENT COURSE

This instructor-led course is a continuation of learning for the Operations role in Insight.

TOPICS INCLUDED:

- ♦ AR Overview (eLearning)
- ♦ Job Recap/Project Reporting
- ♦ New Job Report/Info.
- ♦ Estimates/WIP
- ♦ How to Read Income Statement
- ♦ Project to Financial Flow (Service and Non Service Work)
- ♦ GL Overview, How to Dig Into Income Statement Question

In-Person Class Time: 6 hours

PROJECT ADMINISTRATION

COURSE

This course is intended to introduce the Project Administration role to Insight functionality.

TOPICS INCLUDED:

- ◆ Project Management Overview
- ◆ Set Up Project Budget Part 1
- ◆ Set Up Project: Fixed Price
- ◆ Set Up Project Budget Part 2
- ◆ Set Up Project: Time & Material
- ◆ Set Up Project Requirements Part 1
- ◆ Input OCIP/CCIP
- ◆ Set Up Project Requirements Part 2
- ◆ Set up Payroll for a Project

eLearning Module Time: 2 hours 15 minutes

OFFICE TIME ENTRY COURSE

This course is intended to introduce the Office Time Entry role to Insight functionality.

TOPICS INCLUDED:

- ◆ Entering Self Time in StaffRight
- ◆ Entering Crew Time in StaffRight

eLearning Module Time: 45 Minutes

DATA STEWARD COURSE

This course is intended to introduce the Data Steward role to Insight global address book concepts and functionality.

TOPICS INCLUDED:

- ◆ Create New Global Party
- ◆ Add New Global Customer
- ◆ Create a Vendor Part 1 & 2

eLearning Module Time: 1 hour 25 minutes