Lesson 1

PROJECT SETUP

Overview

In this lesson, you will connect to a Prolog Manager database, set up companies in a database, import information from other Prolog Manager files, and set up cost periods.

It contains the following tasks:

A. Connecting to Prolog Manager

B. Setting Up Other Companies on a Project

C. Importing Data from Other Sources

D. Setting Up Cost Periods

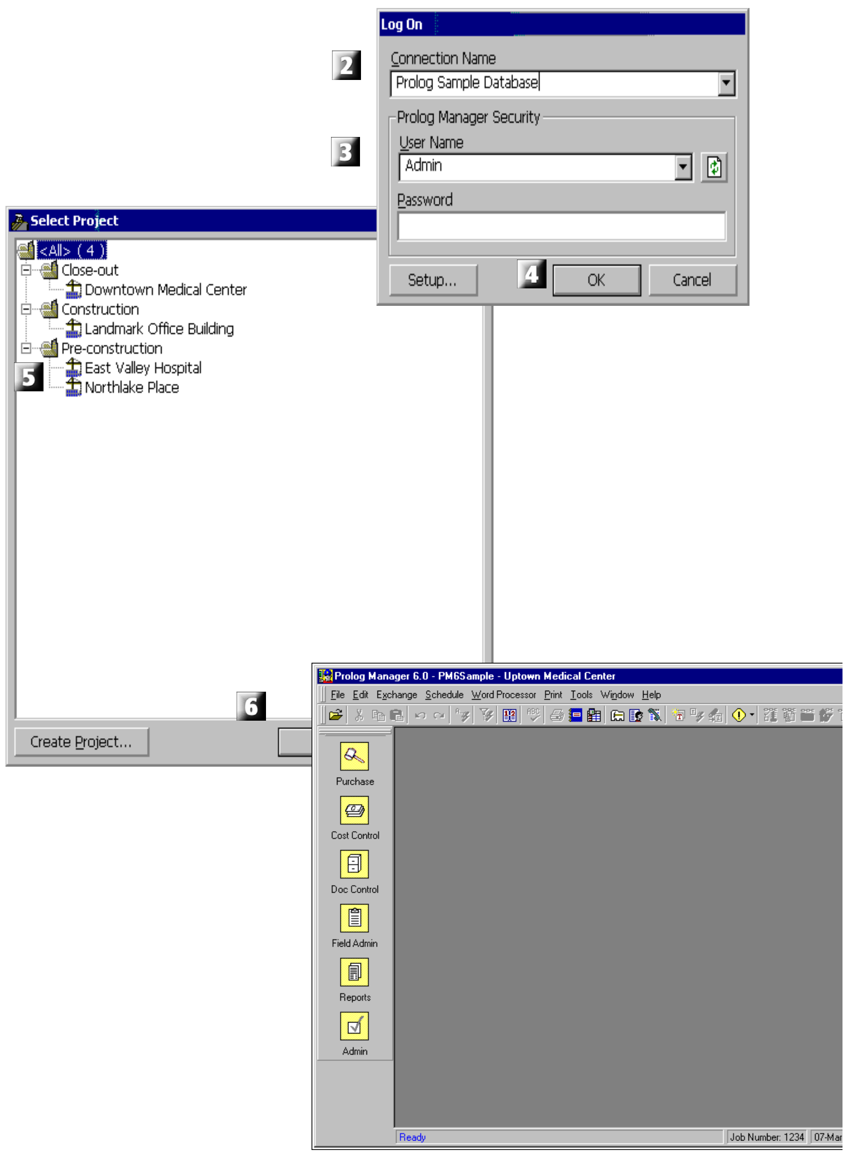
A. Connecting to Prolog Manager

Prolog Manager 6 data resides in a database. A Prolog Manager 6 database can contain data for one or more projects. In order to work with Prolog Manager data, you must first log on to a database on your computer or on another computer to which you are connected, and then you must select the project whose data you wish to work with. However, you can also create new projects within a database. In this task you will log on to Prolog Manager and open database called **prolog sample database**. You will create a new project within that database and then enter data for that new project.

A.1 How Do I Log On to Prolog Manager 6?

In this section, you log on to Prolog Manager and the **Prolog Sample Database**. You will open an existing project in the database but do no work in that project.

1. On the Prolog Manager 6 **File** menu, click **Open Database**
2. **Connection Name**: select **prolog sample database**
3. **User Name** list: select **Admin**
4. Click **OK**
5. **Select Project**: select **East Valley Hospital**
6. Click **OK:** Prolog Manager appears



Meridian PROJECT SYSTEMS

Notes:

If Admin does not appear in the **User Name** list, click **Refresh:**

Leave the **Password** field blank for now. Generally, a password is required.

Admin is a “pre installed user” with maximum permission to change your setup. Later you will log in as yourself.

The projects in this database are grouped into **Close-out**, **Construction** and **Pre-construction** phases.

You will open **East Valley Hospital** for this project and then create a new project from within the database. However, you could click **Create Project** to skip directly to step 3 of the following section.

A Cool Tool: Your projects are arranged into groups **Close-out**, **Construction** and **Pre-construction;** these groups are determined by the selection in the Project Status field. You can change the field by which projects are grouped. For example, you could use the owner or the project manager as the field which determines the grouping arrangement. To change the manner in which projects are assigned to a group, on the **Portfolio Manager**, click **Set Groups**.

A.2 How Do I Create a New Project?

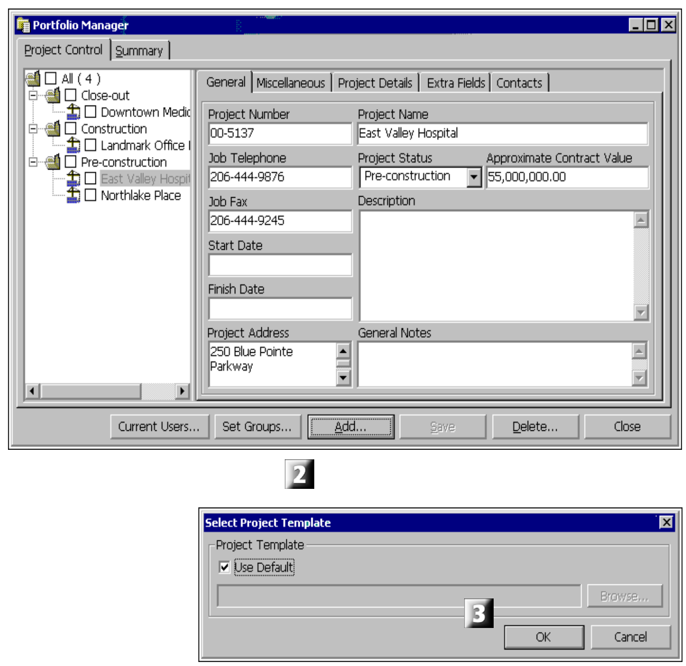
All information in Prolog Manager is organized by projects. Projects reside in databases. The **prolog sample database** contains a project with which you will do most of your work in this book. However, in this task you will create a new project.

You are able to create a new project because you are logged on as Admin. A user logged in as Admin has the widest possible permission to perform tasks within the system.

In this task you will not enter all of the information about the project you might normally enter but only the essential information .

1. Create the Project

1. Prolog Manager **File** menu: click **Portfolio Manager**
2. Click **Add**
3. Click **OK**. The **Portfolio Manager** window displays a new project titled **Prolog Manager New Project** in a group titled **<Property Not Set>.**



Notes: A message asks which **Project Template** you wish to use. **Default** is already checked. The project template can include project specific data, such as lookup list information. However, the default template is empty of such material. You can create additional templates with Prolog Administrator 6.

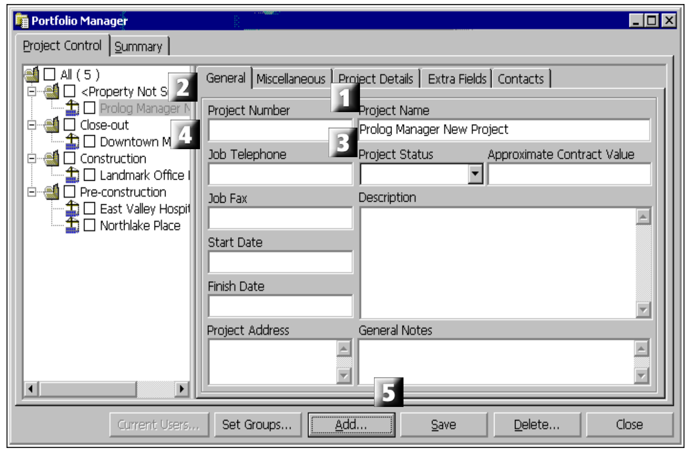
2. Enter Essential Data

1. **Project Name**: rename the new project as **Suburbia Elementary School**

2. **Project Number**: enter **00-9875**.

3. **Project Status**: select **Construction**.

4. Enter the following:
   Job Telephone:
   (123) 456-7890
   Job Fax:
   (123) 456-7891
   Start Date:
   12/1/00
   Finish Date:
   6/1/01
   Approximate Contract Value:
   4,000,000
   Description:
   2 Story Addition to Suburbia Elementary School
   Project Address:
   500 Main Street
   Santa Monica, CA
   90025



5. Click **Save**.

6. Click **OK**.

Notes: The **Project Status** of **Construction** indicates construction has already begun.

The final **OK** appears on a confirmation dialog.

After you enter this data, the project appears in the **Project Control** list within the **Construction** group.

A Cool Tool: When you wish to enter data in a number of fields on a form, use the TAB key to move from one field to the next.

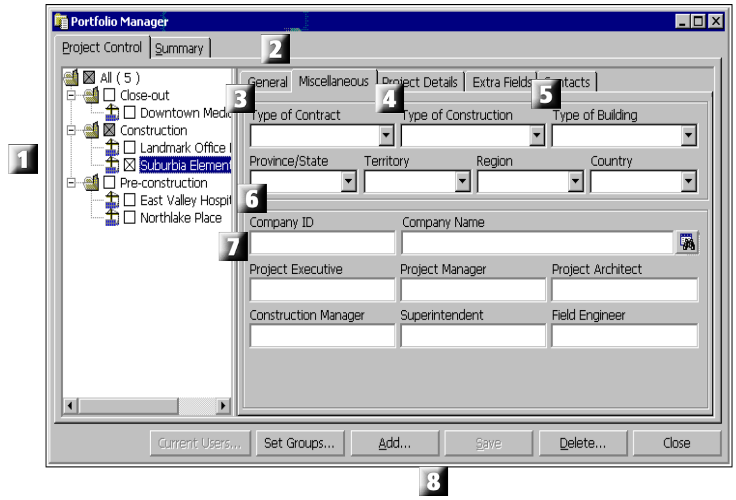
When you wish to view a dropdown list, either click the dropdown arrow to the left of the list:

or else click in the field and press F4.

A.3 How Do I Enter Project Information?

In this task, you will add essential descriptive information for the new project you just created.

1. **Portfolio Manager**: select **Suburbia Elementary School**
2. Click the **Miscellaneous** tab
3. **Type of Contract: GMP**
4. **Type of Construction: Steel Frame**
5. **Type of Building: School**
6. **Company ID: ACC**
7. Enter names for the project leaders in the following fields:
   Project Executive
   Project Manager
   Project Architect
   Construction Manager
   Superintendent
   Field Engineer
8. Click **Save**



Notes:

This project is operating under a **Guaranteed Maximum Price** contract.

After you enter **School**, it will appear as a choice in the **Type of Building** list.

ACC is the code which represents **Acme Construction Inc.** which is used throughout most of the examples in this book.

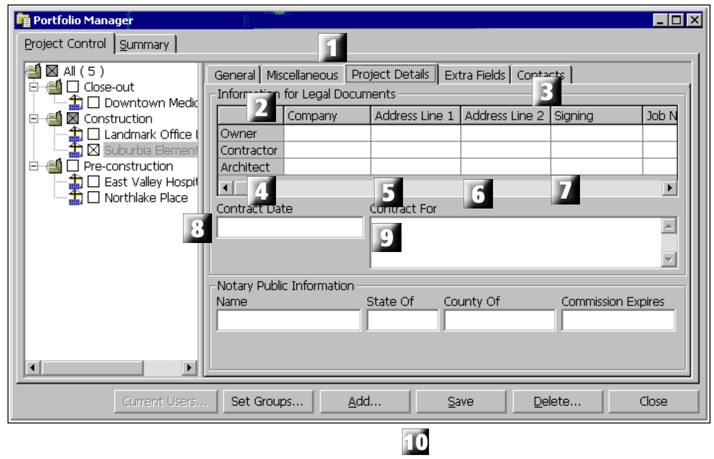
Once you create the company code, you can type **ACC** into any **Company** field in Prolog Manager and **ACC** will be replaced with **Acme Construction Inc.**

You can save the record after these steps and then go back to the form later to add more data.

A.4 How Do I Enter Legal Information?

The **Project Details** tab records legal information for companies working on your project, such as the name of the person with authority to sign change orders and other legal documents.

1. **Project Control** page. **Portfolio Manager**: click the **Project Details** tab
2. **Company Name** column, **Owner** row: **North City School District**
3. **Signing Authority** column, **Owner** row: **Pete Petrie**
4. **Company Name** column, **Architect** row: **JOF Architects**
5. **Address Line 1**: **9056 Samson**
6. **Address Line 2**: **Los Angeles, CA 92340**
7. **Signing Authority** column, **Architect** row: **Brockton Hamilton**
8. **Contract Date 10/1/00**
9. **Contract For**: **School addition**
10. Click **Save**

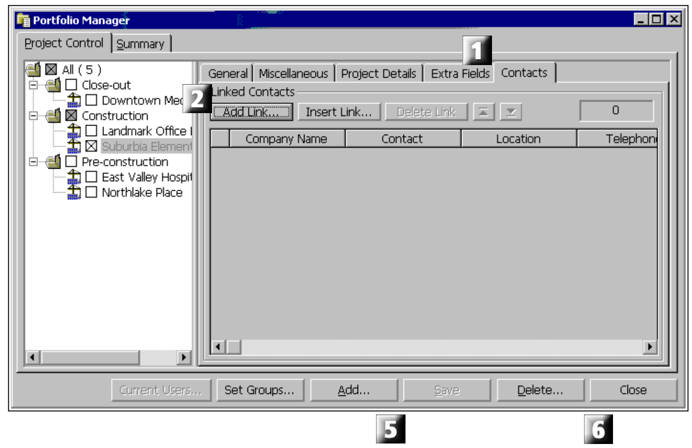


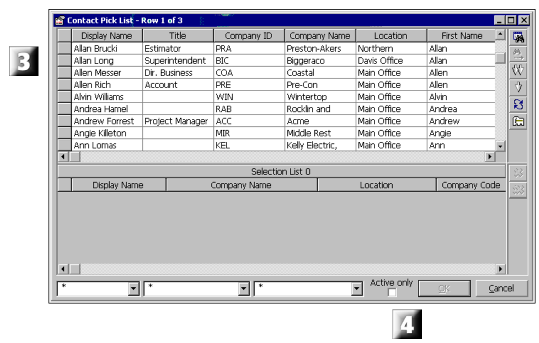
Notes: When you type **00** in a date field, it is automatically read as **2000**.

A.5 How Do I Enter Contact Information?

Contacts are individuals who are associated with your project. In the course of a project, you will enter identification information on individuals many times. By designating an individual as a contact for your project, you can enter that individual's data into your forms more easily. You can select individuals who have already been entered into your database (as they have been contacts for other projects) as contacts for your current project.

1. With **Portfolio Manager** still opened to **Suburbia Elementary School**, click the **Contacts** tab
2. Click **Add Link**
3. Select the following individuals:
   Andrea Hamel
   Andrew Forrest
   Bill Jones
4. Click **OK**
5. Click **Save**
6. Click **Close**





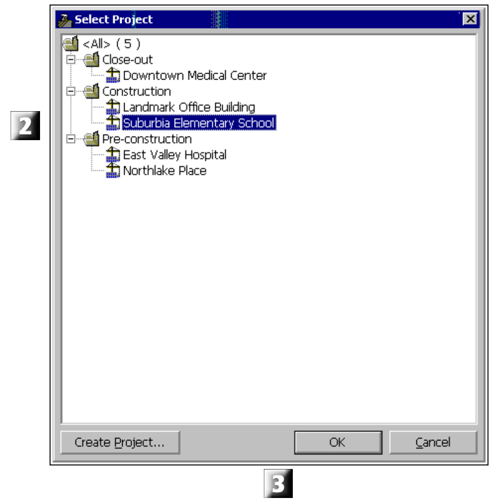
Notes: If you wish to designate an individual as a contact who does not appear on the **Contacts** pick list, you just first open the **Company Setup** form for that individual's company and enter the individual's data on the **Contacts** tab of that form. For more information, see "How Do I Enter Company Contact Information?" on page 20.

A Cool Tool: When you want to select a particular entry from a long pick list, you can jump quickly to that entry: Click the column header for which you know the entry (for example, **Name**) and then type the first letter of the entry you are searching for. The first entry in the list beginning with that letter is selected. Type the second letter of the name you are searching for and the first entry in the list beginning with the two letters you typed is selected, and so on.

A.6 How Do I Log on to a New Project?

Now that you have created a new project, you will log on to it so that you can begin working in it.

1. In Prolog Manager, on the **File** menu, click **Open Project**
2. Select **Suburbia Elementary School**
3. Click **OK**



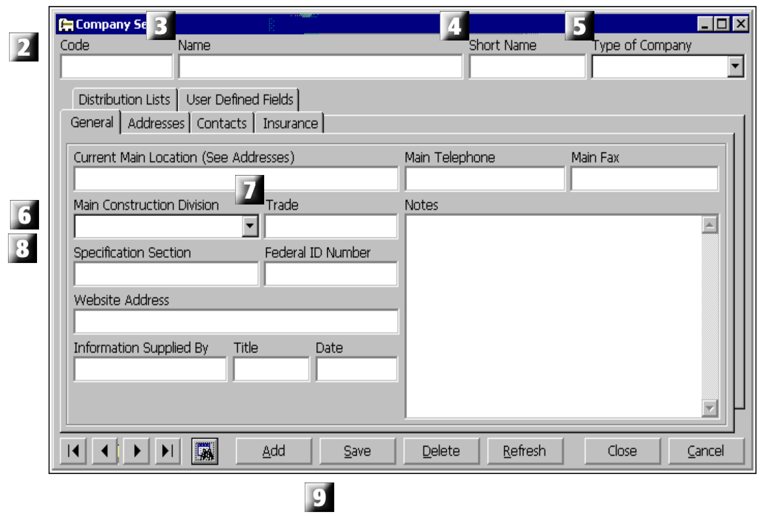
Notes:

B. Setting Up Other Companies on a Project

Other companies will work with your company on a project. Before you can create records which reference other companies on your job, you need to create a company record for each of the companies you work with in Prolog Manager. In order to enter this information, you must open a Prolog Manager 6 database and then enter the company information in the database, rather than the project. As a result, company information is available across all the projects within a single database.

B.1 How Do I Setup General Project Information?

In this task, you will create a company record for Lorring Steel, a subcontractor on the Suburbia Elementary School project.



1 On the Switchboard, click **Admin,** and on the shortcut menu, click **Company Setup**

2 **Code**: **LOS**

3 **Name**: **Lorring Steel**

4 **Short Name**: **LOS - 05120**

5 **Type of Company: Subcontractor**

6 **Main Construction Division: Structural Steel (05)**

7 **Trade: Metal Decking, Structural Steel**

8 **Specification Section**: **05120**

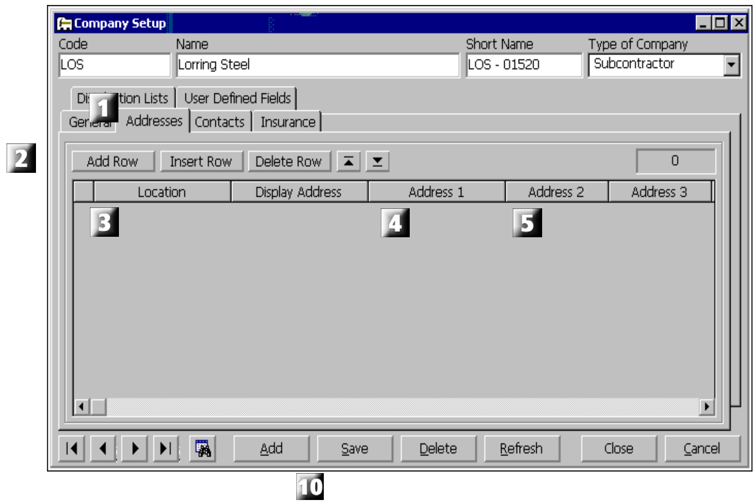
9 Click **Save**

Notes: **LOS** stands for Lorring Steel. The company code you are creating uses the first two letters of the first word of the company name, and the first letter of the second word of the name.

LOS - 05120 is our vendor number for Lorring Steel.

B.2 How Do I Enter Address Information?

Once you create the record for Lorring Steel, you can enter address information for the company on the **Addresses** tab.



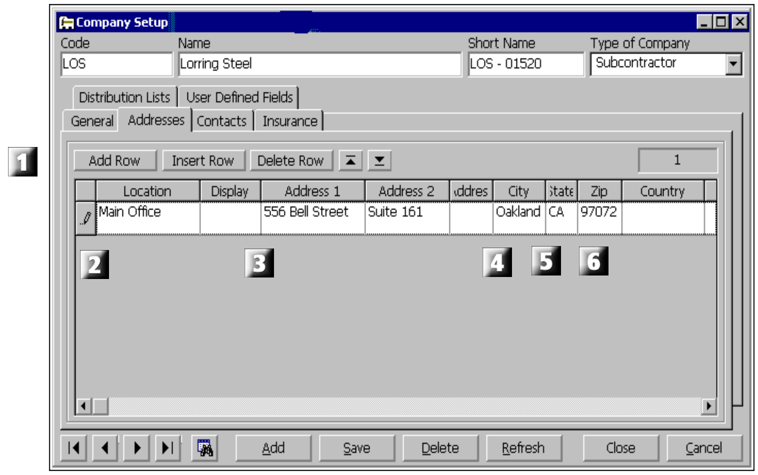
1. On the **Company Setup** form, click the **Addresses** tab
2. Click **Add Row**
3. **Location**: **Main Office**
4. **Address 1** column: **556 Bell Street**
5. **Address 2** column: **Suite 161**
6. **City** column: **Oakland**
7. **State** column: **CA**
8. **Zip** column: **97071**
9. **Type of Address** column: **General**
10. Click **Save**

Notes: When you save the record a Display Address is created, combining the information you entered into the **Address 1**, **Address 2**, **City**, **State**, and **Zip** columns.

B.3 How Do I Add an Additional Company Address?

You also need to enter the information for the Lorring Steel jobsite office.

1. Click **Add Row**
2. **Location**: **Jobsite Trailer**
3. **Address 1: 123 Fifth Street**
4. **City: Santa Monica**
5. **State**: **CA**
6. **Zip**: **90025**
7. **Click**: **Save**.



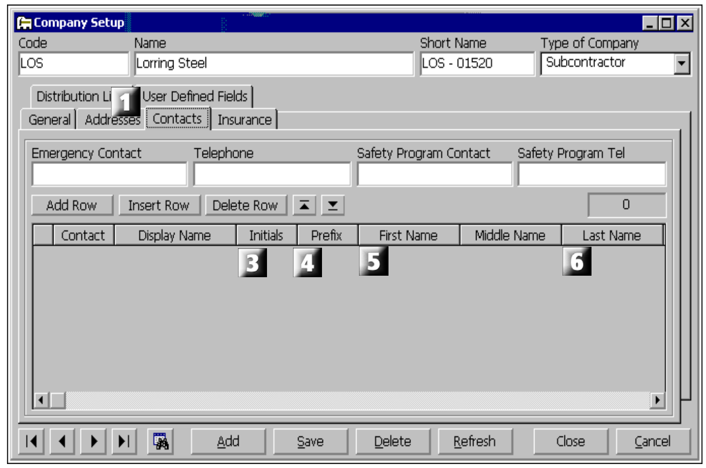
Notes:

B.4 How Do I Enter Company Contact Information?

You can use the **Contacts** tab to enter information for each of the contacts at a particular company. In this task, you will enter information for Don Walker, a contact at the main office of Lewis Steel.

1. Personal Identification

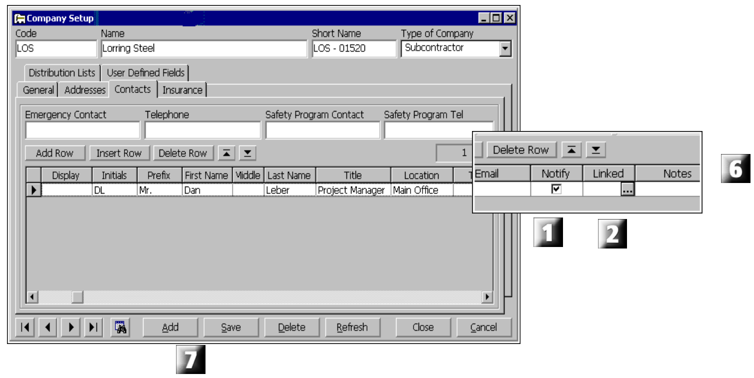
1. On the **Company Setup** form, click the **Contacts** tab
2. Click **Add Row**
3. **Initials** column: **DW**
4. **Prefix** column: **Mr.**
5. **First Name**: **Don**
6. **Last Name**: **Walker**
7. **Title** column: **Project Manager**
8. **Location** column: **Main Office**

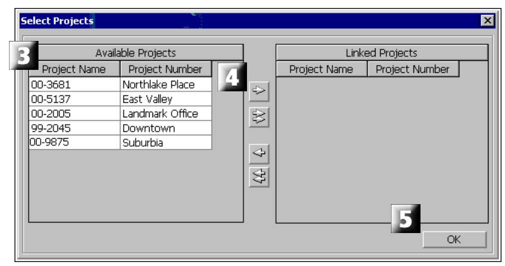


Notes: When you save the record (step 7 on the next page), a code is created and entered in the **Contact ID** field and the name **Don Walker** will appear in the **Display Name** column.

2. Additional Information

1. Check the **Notify** column
2. **Linked Projects** column, click Ellipsis (...) button
3. **Project Number** column: **00-9875**
4. Click **Copy selection**
5. Click **OK**
6. On the far right-hand side of the grid, make sure **Active** is checked
7. Click **Save**.





Notes: By checking the Notify column, Don will receive automatic notification of events in **Prolog WebSite** via email

A Cool Tool: You can change the appearance of any grid in Prolog Manager. The following list describes the different changes you can make. (If you cannot make one of these changes, your computer or your company system is set up to not allow this feature. Consult your system administrator to discuss possible change.)

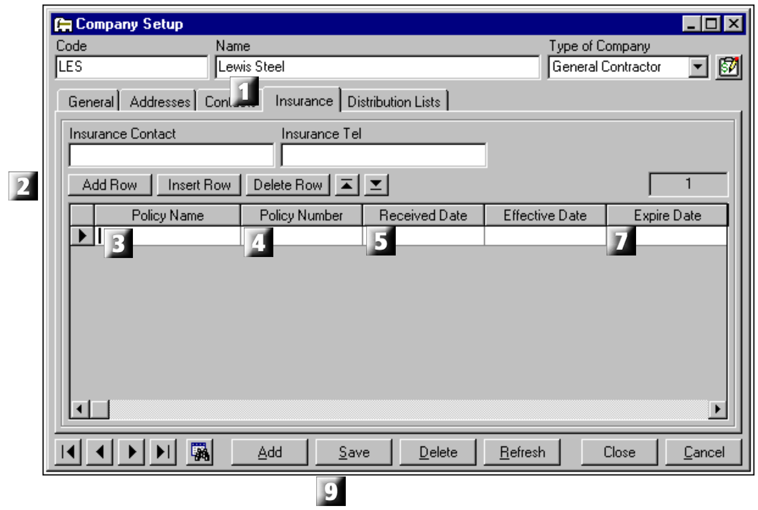
To do this:	Here's what to do:
To resize column width	Click on the line separating two column titles and drag.
To move columns	Click on a column title and drag it.
To change the column order	Click on the column header and select the field you want for that column from the list.

To do this:	**Here's what to do:**
To change the row height	Click on the bottom line of the row on the gray box at the row's extreme left and drag to the desired height.
To use the splitter	The splitter appears as a double vertical line at the far left of the grid. When you scroll across a row to view other columns, the columns to the left of the splitter remain stationary. To use the splitter for the first time, right-click on the grid and click **Grid Properties**; then check **Show Splitter**. To change the number of stationary columns, click on the double line and drag it to the right of the columns you wish to remain stationary. For more on the splitter, see "How Do I Customize the Meeting Items Grid?" on page 299.
Change the number of columns to the left of the splitter	Click on the splitter (the double line) and drag it.

B.5 How Do I Enter Company Insurance Information?

On the **Insurance** tab, you can enter insurance policy information for Lewis Steel.

1. On the **Company Setup** form, click the **Insurance** tab
2. Click **Add Row**
3. **Policy Name** column: **Gen. Liability**
4. **Policy Number** column: **123-456-7890**
5. **Received Date** column, type today's date
6. **Start Date** column: type the first of this month
7. **Expire Date** column, enter the date one year from today
8. Scroll to the right and enter the following:
   Amount column, type: **1,000,000**
   Carrier column: **Allied Insurance**
   Contact column: **Judy Jones**.
   Alert column: check
9. Click **Save**.
10. Click **Close**.



Notes:

You enter today's date in the **Received Date** field, as the Certificate of Insurance was received today.

When you enter **1,000,000**, the number converts to **1,000,000.00** when you move to the next cell in the grid.

The check in the **Alerts** box indicates that the policy is included in the **Auto Aler**t notices.

Now that you have set up Lorring Steel as a company, you can refer to Lorring Steel in Prolog Manager forms and documents without having to re-type the company information.

You can enter additional information about a company on the **Advanced Company Setup** form. To view this form, on the Switchboard, click **Admin** and on the menu, click **Advanced Company Setup**. The information you can enter on this form is particularly useful for purchasing. (It is similar to the Vendor Profile form that was found in Prolog Manager 5)

A Cool Tool: Note shortcuts to enter a date in a date field. You can use them in any date field in Prolog Manager:
1. CTRL + D enters today's date
2. 1 + TAB enters the first of the current month; (any number + TAB enters that date of the current month)
3. Double-clicking the date field displays a calendar from which you can select any date.

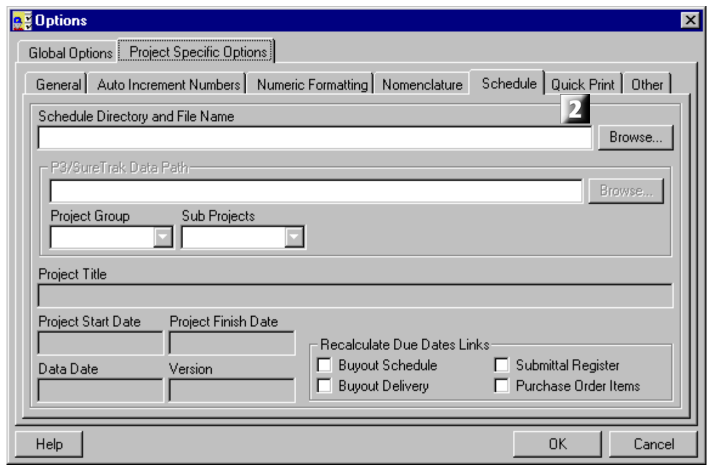
C. Importing Data from Other Sources

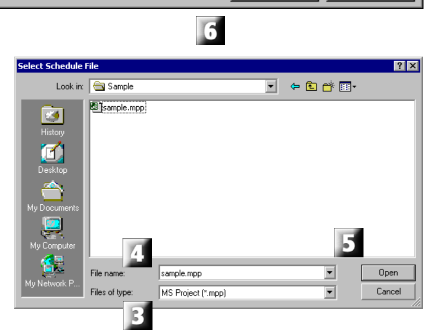
In order to save data entry time, you can import data from other Prolog Manager projects within your current database or from other Prolog Manager databases by using the **Import Common Prolog Manager** data feature. You can also import information from a project schedule, spreadsheets, or word processing documents.

C.1 How Do I Import Tasks from a Schedule?

In this task, you'll import schedule items from an outside schedule into your Prolog Manager project. By doing so, you can link records you create in Prolog Manager, such as buyout and submittal items and potential change orders, to project tasks which need to be completed, such as submittal packages, inventory deliveries, and inspections.

1. On the Prolog Manager **Schedule** menu, click **Import Tasks**
2. Click **Browse**
3. **Files of type:** select **MPP Files (*.mpp)**
4. Select the file **C:\Program Files\Meridian\Prolog 6\Program\Sample\Sample.mpp**
5. Click **Open**
6. Click **OK**
7. Click **Yes** to confirm





Notes: A message asks, **Automatically replace records with unique IDs?** If you replace records which have unique IDs, you eliminate duplicating records in your database.

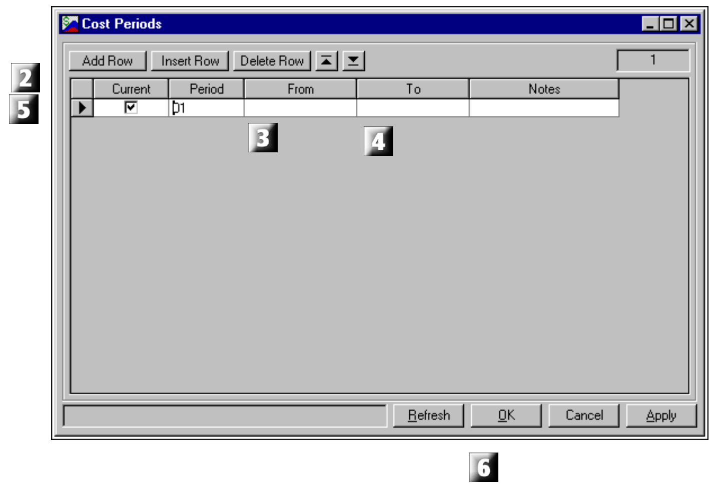
D. Setting Up Cost Periods

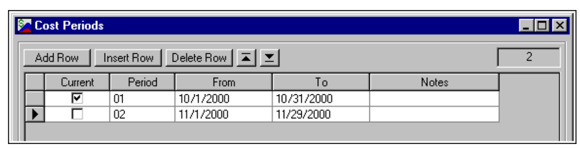
A cost period is an interval of time used to track costs. In Prolog Manager, you can determine the date range and length of cost periods. Cost periods are required if you are using Prolog Manager to track **General Invoices**, **Contract Invoices** and **Applications for Payment**.

D.1 How Do I Establish Cost Periods?

In this task, you will set up cost periods for the Suburban Elementary School.

1. On the Switchboard, click **Admin** and on the shortcut menu click **Cost Periods**
2. Click **Add Row**
3. **From** column: **10/1/00**
4. **To** column: **10/31/00**
5. Click **Add Row**
6. Click **OK**
7. To confirm, click **Yes**





Notes: When you click **Add Row** the second time (step 5), a second period is created based on the information you entered in the first period.

Before closing the Cost Periods dialog, make sure that the current period is selected in the **Current** column.

When you click Yes to confirm your changes (step 7), you must wait a few moments while recalculations are made.

Lesson 2

SECURITY MANAGER

Overview

In this lesson, you will log on to a project, add a new contact for a company and then set up the contact in **Security Manager**.

It contains:

A. Setting Up Security for Prolog Manager Users

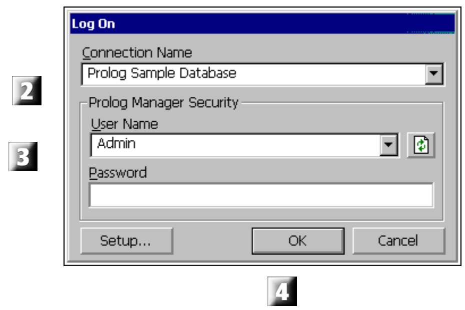
A. Setting Up Security for Prolog Manager Users

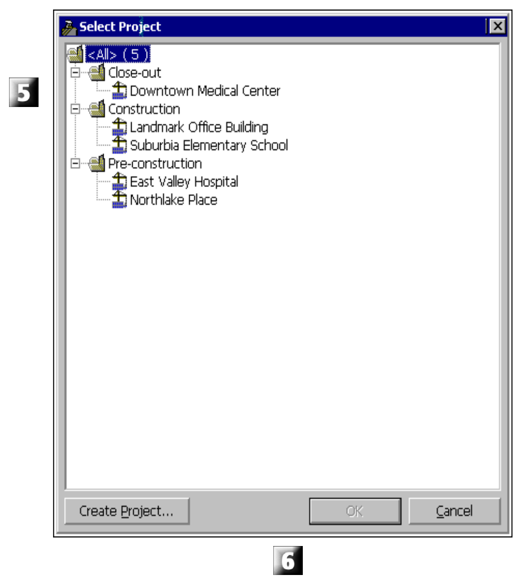
For your staff to log on to Prolog Manager, you must set them up as users in **Security Manager**. In this task, you will add yourself as a contact for the general contractor and then add yourself as a user in **Security Manager**.

A.1 How Do I Open a Project?

In the previous lesson, you created a new project. However, for the remainder of the class, you will use a different project within the same database to complete tasks. To use **Security Manager**, you must log on to the **Prolog Sample Database** as the administrator and open the training project, called **Downtown Medical Center.**

1. On Prolog Manager's **File** menu, click **Open Database**
2. Verify **Connection Name** displays **Prolog Sample Database**
3. **User Name**: select **Admin**
4. Click **OK**
5. **Select Project**: select **Downtown Medical Center**
6. Click **OK**

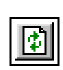




Notes:

If you are already logged on to a database (step 1), a message asks if you want to close your current database. Click **Yes**.

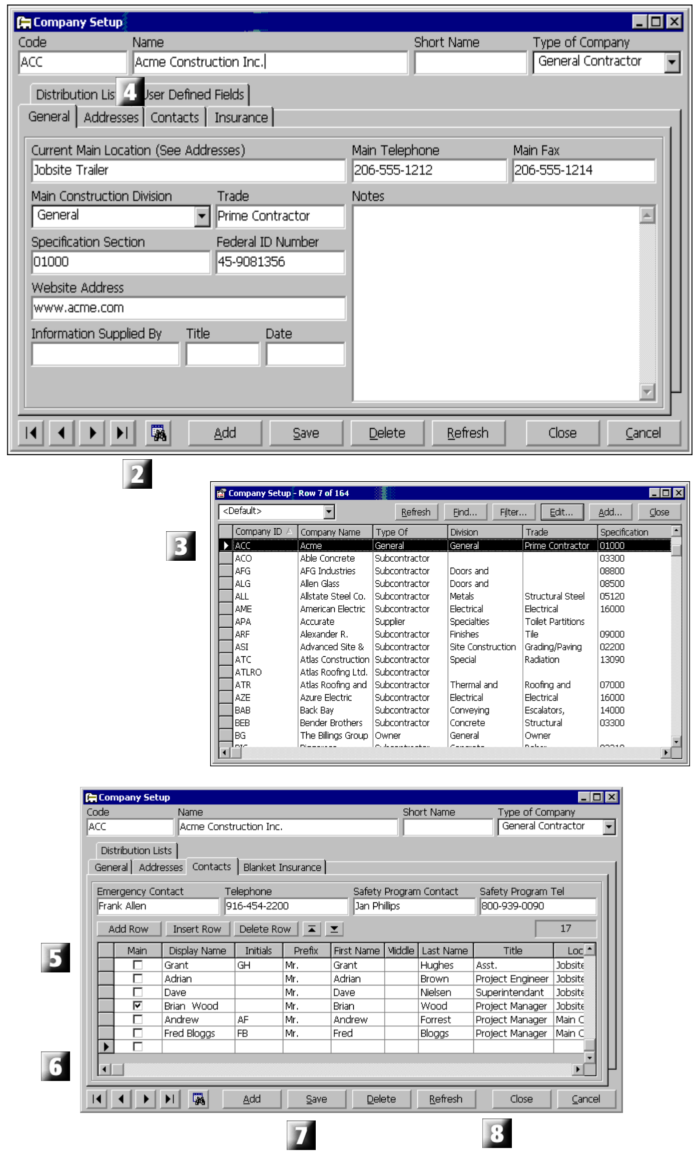
Prolog Manager 6.0 databases can contain more than one project. A computer can contain more than one database.

If Admin does not appear in the list, click Refresh:  and then select **Admin**. Leave the **Password** field blank.

A.2 How Do I Add a Contact to our Company Setup?

In this task, you will use the **Company Setup** form to add yourself as a contact for Acme Construction, Ltd.

1. On the **Switchboard**, click **Admin** and on the shortcut menu, click **Company Setup**
2. Click the **Lookup** button
3. Double-click on **Acme Construction, Ltd.**
4. Click the **Contacts** tab
5. Click **Add Row**
6. Add yourself as a contact for Acme Construction. Enter your title and select a location.
7. Click **Save**
8. Click **Close**



Notes: To open the **Company Setup** form you can also click **Company Setup** on the Prolog Manager toolbar.

When you click **Save** (step 7) a message appears asking you to confirm your changes. Click **Yes**.

A Cool Tool: In Prolog Manager, when you add new records or save changes in your work, a message box appears asking if you want to confirm your changes. To turn this function off, on the **Tools** menu, click **Preferences** and on the submenu, click **Options**. On the **Options** dialog, remove the checks from **Confirm before saving new data** and **Confirm before saving changes**.

From here onward, this book assumes you have turned this feature off.

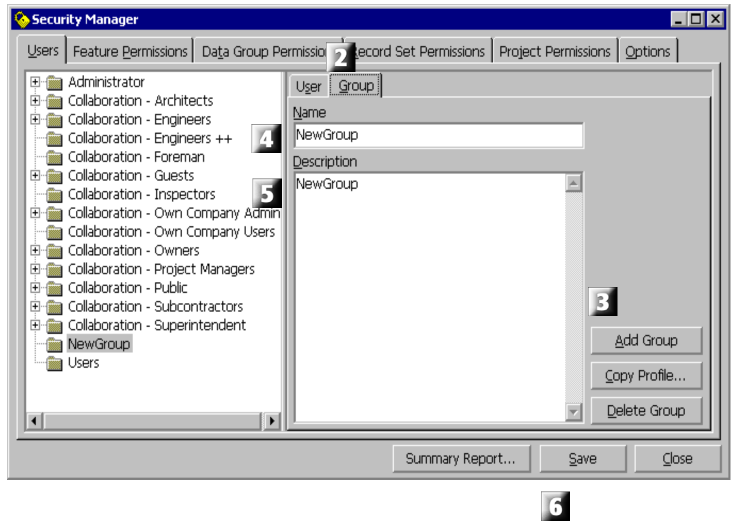
A Cool Tool: Notice the navigational buttons on the lower left of the Company Setup form:

These buttons appear on many pages throughout Prolog Manager. Use these buttons to “scroll through” all of the instances of what appears on the form. In this case, you can scroll through all of the companies in your database. The left-hand button arrow takes you to the first company. The right-hand arrow button takes you to the last one. The middle two take you one forward and one backward. These buttons are referenced in the Appendix section “Form Buttons Toolbar” on page 355.

A.3 How Do I Add a User Group to Security Manager?

In this task, you will use **Security Manager** to create a user group for Acme Construction. On the **Users** tab in **Security Manager**, each folder represents a user group.

1. On the **Tools** menu, click **Security**, and on the submenu click **Security Manager**
2. Click the **Group** tab
3. Click **Add Group**
4. Under **Group**, in the **Name** field, type: **Acme Construction**
5. In the **Description** field, type: **Employees of Acme Construction**
6. Click **Save**

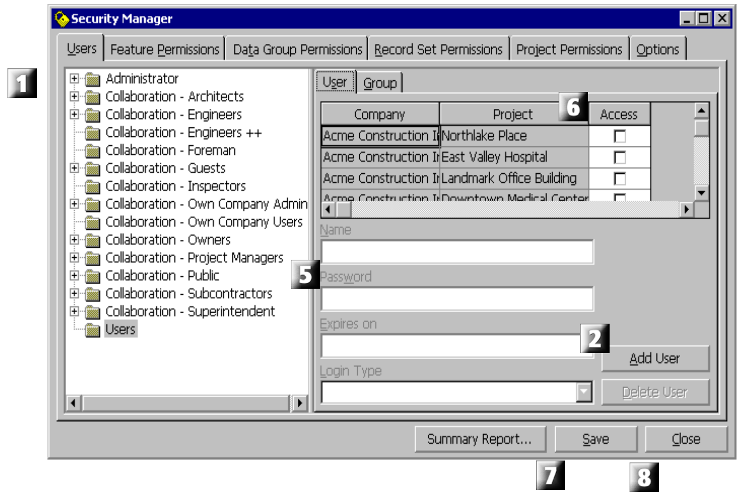


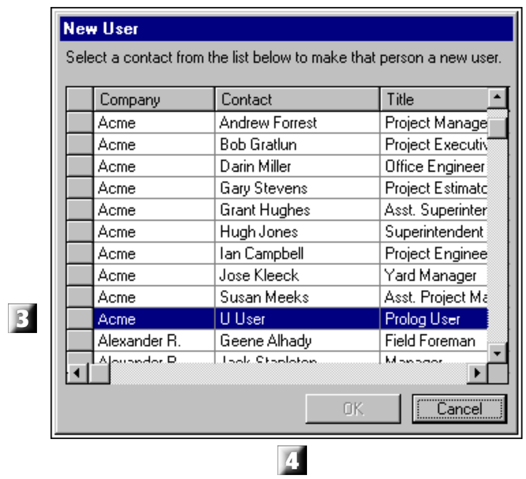
Notes:

A.4 How Do I Add a User to Security Manager?

Now that you have added yourself as a contact for Acme Construction and created a user group for Acme Construction, you will add yourself as a user in **Security Manager**.

1. On the **User** tab, select the **Acme Construction** folder
2. Click **Add User**
3. Select your name
4. Click **OK**
5. On the **User** tab in the **Password** field, leave the field blank
6. Check **Access** for each
7. Click **Save**
8. Click **Close**





Notes: You can assign the user a login password (step 5); however, you will not assign a password at this time.

You can select your own name because you previously added yourself as a contact.

A Cool Tool: If you are logged in as **Admin**, the remaining tabs on Security Manager allow you change permissions assigned to members of the selected user group, as follows:

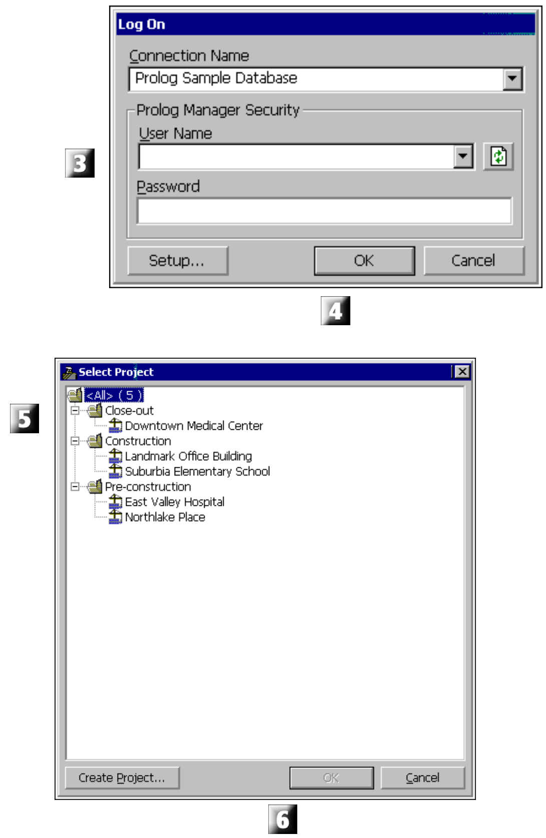
Tab	Allows you to:
Feature Permissions	Make whole forms invisible to members of the selected user group
Data Group Permissions	Make a group of data elements invisible or read-only for the members of the selected user group

Tab	Allows you to:
Record Set Permissions	Assign permission to view, add, modify or delete specific record types. To keep your Company data consistent, you may want to eliminate permission to **Add** on Company Setup data on this tab for most users.
Project Permissions	Specify individuals who can view any information for a specific project

A.5 How Do I Log on to the Training Database as Myself?

In A.1 you logged on to the training database as the administrator. Now that you have set yourself up as a user in **Security Manager**, you can log on to the training database as yourself:

1. On the Prolog Manager **File** menu, click **Close Database**
2. On the **File** menu, click **Open Database**
3. **User Name** list, select your name
4. Click **OK**
5. Select **Downtown Medical Center**
6. Click **OK**



Notes: