

Familiarisation Guide





Familiarisation Guide

Familiarising yourself with your system is a vital part of your launch phase with your Training Success Platform. This not only allows you to spot and correct any errors before you launch, it also enables you to get familiar with accessing your data within your new system and practice using the tool so that you can get the absolute most out of your training day.

There are two aspects to look at:

1. Looking at the set-up of your system

Here you will look at specific modules within the system to check that your data has been added as you expected it to.

While your implementation manager will have done their best to understand your requirements and taken their time while building your system for you, occasionally misunderstandings can happen. This is your opportunity to sense check the data and correct anything or update data which may have changed since you provided it during the implementation.

2. Running through the day-to-day use of your system

Here you will run through processes which you will regularly complete using your Training Success Platform such as making bookings and transferring delegates. Within this guide, we have referenced the typical key processes that Training Providers need to complete regularly, however please ensure you complete any additional processes if yours differ. Also within this familiarisation aspect you are expected to access the system as various types of other users, such as trainers and managers, so that you have a good understanding of their abilities within your system.



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Set-up

Whilst completing the familiarisation guide, use the checkboxes below to mark your progress. If you come across any issues or note any changes you would like to make, please contact your implementation manager

Users

- Total number of users
- $\hfill\square$ Correct permission set assigned
- □ Belong to the correct Account
- □ Email addresses

Accounts

- \Box Total number of accounts
- □ Belong to the correct Account Group
- □ Contact details

Course Templates

- $\hfill\square$ Total number of course templates
- $\hfill\square$ Course template costs and (if present) price schemes
- \Box Course template min / max places
- $\hfill\square$ Course durations and sessions plans
- □ Categories
- \Box Course text

Course Dates

- \Box Total number of course dates
- □ Trainers
- □ Venues

Resources

- □ Total number of trainers
- □ My Teaching options for trainers
- □ Trainers and their associated courses
- □ Total number of venues
- $\hfill\square$ Total number of other resources

Day to Day

- 1. Testing Preparation
 - Creating account for testing
 - Creating users for testing
 - Creating trainer for testing
 - Creating courses for testing
- 2. Booking Process
- 3. Delegate Management
 - Transfer a delegate to another course

ADOPT

OPTIMISE

GOLIVE

BUILD

PLAN

- Change a delegate to another user
- Cancel a delegate
- 4. Document Generation
- 5. Course Cancellation
- 6. Course Completion
- 7. Moving a course
- 8. Changing a trainer / venue on a course
- 9. Logging in as a trainer
- 10. Logging in as a manager
- 11. Logging in as a learner



🔑 <u>Set-up</u>

Users

Your users include the people in your customer base, your administrators, and your trainers – essentially anyone who can use the system!

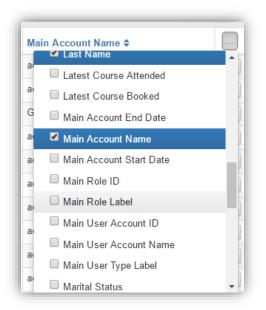
1. Total number of users

Access your system > Open the Users page > check the total results are roughly the number of users you expect to find

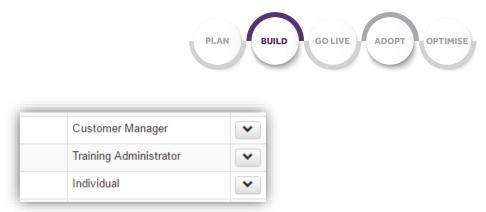
+	Add Filters Vie	ws Bulk Edit Export		Search Q	•
•	First Name 🗢	Last Name 🖨	Email Address 🗢	Main Account Name 🗢	
	Alex	Plan	alex.plan@accessplanit.com	accessplanit Training	~
	Andrew	Flook		accessplanit Training	~
	Craig	Dobson		accessplanit Training	~
	Dawn	Cooper	accessplanitindividual@gmail.com	accessplanit Training	~

2. Correct permission set assigned

Add the column 'Main Role Label' by clicking on the button at the top right of the User 'Datagrid'



Run through the pages of the Users Datagrid to sense check the correct users have the following permissions:

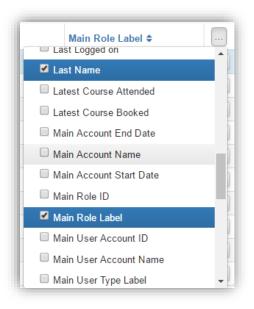


Advanced: Filter the User Datagrid to show you a list of users per permission set

+ Add	Filters Views Bulk Edit Export Search	Q •
Filters 👻	Type the name of a filter to apply or use the Filter button	2 + New Filter Apply 6
Main Role I	abel - Equal To - Training Administrator	5 - +
	My Filter	Cancel ± Save

3. Belong to the correct Account

Add the column 'Main Role Label' by clicking on the button at the top right of the User 'Datagrid'



Run through the pages of the Users Datagrid to sense check the correct users have the correct main account name

Advanced: Filter the User Datagrid to show you a list of users per account

PLAN BUILD GO LIVE	ADOPT OPTIMISE	
+ Add Filters Views Bulk Edit Export	Search	Q ·
Filters Type the name of a filter to apply or use the Filter button	+ 1	New Filter
Main Account Name + B Equal To + A accessp	lanit Training	- +
	My Filter	Cancel ± Save

4. Email addresses

Add the column 'Email Address' by clicking on the button at the top right of the User 'Datagrid'



Run through the pages of the Users Datagrid to sense check the email addresses are correct.

To add any missing email addresses, right click on the user's row and click 'Edit'.

Advanced: Filter the User Datagrid to show you all users without an email address

+ Add Filters Views Bulk Edit Export	Search	Q.
Filters • Type the name of a filter to apply or use the Filter button	+	New Filte 🙎 🗸 Apply
Email Address - Is Empty -		- +
	My Filter Delet	e Cancel + Sav



Accounts

Your accounts are a list of your customers, also listed are the 'holding' accounts which hold your individual users (who do not have an account), trainer users, and administrator users.

1. Total number of accounts

Access your system > Open the Accounts page > check the total results are roughly the number of accounts you expect to find

+	Add Filters Views Bulk Edit Exp	ort		Search	Q -
-	Account Name \$	Town 🗢	Phone Number 🗢	Email Address ≑	
	Accessplanit Test		084525487514	abcindustries@testemail.com	
	Accessplanit Test				
	Accessplanit Company Test	Blackpool		test@yahoo.com	
	Accessplanit Test				

2. Belong to the correct Account Group

Add the column 'Account Group Names' by clicking on the 📃 button at the top right of the Accounts 'Datagrid'

d	dress 🗢	
		Apply
	Account Group IDs	
	Account Group Names	
	Account ID	
	Account Manager ID	
	Account Manager Name	
	Account Name	

Run through the pages of the Accounts Datagrid to sense check the accounts are within the correct groups

3. Contact details

Add the columns 'Email Address', 'Phone', 'Address', 'Town', 'County' and any other contact

details that you are interested in by clicking on the button at the top right of the Account 'Datagrid'

Run through the pages of the Accounts Datagrid to sense check the contact details are correct



Course Templates

You course templates is a list of your course catalogue, this page will list every classroom based, e-learning, webinar and document course that you offer along with the standard values for that course such as the min/max places, duration and cost.

1. Total number of course templates

Access your system > Open the Course Templates page > check the total results are roughly the number of courses in your course catalogue, please note that there may be additional templates for sessional courses

_					
+	Add Filters Views Bulk Edit Export		Search		Q +
•	Label \$	Training Provider \$	Course Template Type 🖨	Delivery Method \$	
	Acceptance Test Document Course	accessplanit Training	Knowledge Documents		~
	Acceptance Test Class Course	Testing Company	Class		~
	Acceptance Test ELearning Course new	accessplanit Training	E Learning		~
	Accesplan Class Course	accessplanit Training	Class	In House	~

2. Total number of course dates

Access your system > Open the Course Templates page > check the total results are roughly the number of courses in your course catalogue, please note that there may be additional templates for sessional courses

3. Course template costs and (if present) price schemes

Add the columns 'Cost' and 'Cost Type' by clicking on the 📃 button at the top right of the Course Template 'Datagrid'

te Type 🖨	Delivery Method 🖨	
Awarde	ed Award Labels	-
🗆 Catego	ry IDs	
Catego	ry Labels	
Colour		
Cost		
Cost Ty	/pe)
Course	Template ID)
		5

Run through the pages of the course templates Datagrid to sense check the course templates have the correct cost values

Advanced: Sort the course templates by their cost by clicking on the cost column

PLAN BUILD	GO LIVE ADOPT OPTIMISE

Search Q			•
ery Method ≎	Cost *	Cost Type 🖨	
	25	Delegate	~

Search for course templates which should have different costs for different types of users

	Fire Safety		Q	•	
ery Method 🗢	Maximum Places 🖨	Minimum Plac	es 🖨		
	0	0		~	

Right click on the course template and select the option 'Price Schemes'

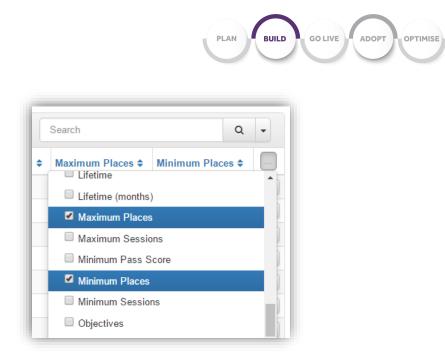
Overrides	Add
Resource Requirements	Add
Session Plan Items	Add
Tasks	Add
Text	
Price Schemes	Add
Merge	
Delete	
L	

Check that the alternative lower costs for the course are listed as price schemes

4. Course template min / max places

Add the columns 'Maximum Places' and 'Minimum Places' by clicking on the button at the top right of the Course Template 'Datagrid'.

Bear in mind that these values are only appropriate for classroom and webinar courses

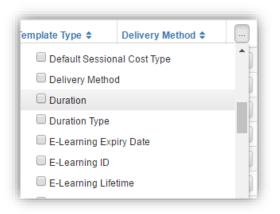


Run through the pages of the course templates Datagrid to sense check the course templates have the correct max/min number of places

5. Course durations and sessions plans

Add the columns 'Duration', 'Duration Type' and 'Sessional' by clicking on the at the top right of the Course Template 'Datagrid'

button



Run through the pages of the course templates Datagrid to sense check the course templates have the correct durations, and that your multi-day courses are sessional

Right click on each sessional course in turn, and select 'Session Plan Items'

industries	
Overrides	Add
Resource Requirements	Add
Session Plan Items	Add
Tasks	Add
Text	
Price Schemes	Add
Merae	

Check the sessions plan is as expected



+	Add Filters	Views	Bulk Ed	lit Export			Search	٩	•
-	Mapped Course 1	Template Na	ame 🗢	Start Time 💠	End Time 🖨	Offset Unit 🖨	Offset Type 🖨	Is Mandatory \$	
	First Aid Session			09:00	17:00		Unknown	Yes	~
	First Aid Session			09:00	17:00	1	Days	Yes	~
	First Aid Session			09:00	17:00	2	Days	Yes	×

6. Categories

Add the column 'Category Labels' by clicking on the button at the top right of the Course Template 'Datagrid'

Ter	nplate Type 🗢	Category Labels 🖨	
		Apply	Î
19	Active from		
ng	Advertise		
	Aims		ĥ
	Auto Complete		-
10	Award Type		J
¥۲	Awarded Award	l IDs)
٦E	Awarded Award	Labels	D
٦E	Category IDs		
N.	Category Label	s	5
	Colour		-
19			

Run through the pages of the course templates Datagrid to sense check the course templates have the correct categories assigned

7. Course text

Changes the columns displayed within your Course Templates Datagrid to 'Label', 'Aims', 'Objectives', and 'Summary'

Label 🗢 Aims 🗢	Objectives 🗢	Summary 🗢	
----------------	--------------	-----------	--

Run through the pages of the course templates Datagrid to sense check the course text for each course template

Advanced: Filter the course templates Datagrid to show you all courses missing Aims/Objectives/Summary text



+ Add Fitters Views Bulk Edit Export	Search	Q -
Filters Type the name of a filter to apply or use the Filter button	·	+ New Filte 2 - Apply 5
Aims - Is Empty - 4		- +

Course Dates

1. Total number of course dates

Access your system > Open the Course Dates page > check the total results are roughly the number of courses in your course catalogue, please note that there may be additional templates for sessional courses

+	Add Filters Bulk Edit Export		
You	do not yet have any filters defined for this DataGrid, to	o create a filter please click the More	Filters button
Ŧ	Label 🗸	Start Date 🗢	End Date 🗢
	Welcome to the Workplace -	7/29/2019 8:00 AM	7/29/2019 9:00 AM
	Welcome to the Workplace -	7/3/2019 9:00 AM	7/4/2019 9:00 AM
	Welcome to the Workplace -	7/4/2019 9:00 AM	7/5/2019 9:00 AM
	Welcome to the Workplace -	7/5/2019 9:00 AM	7/8/2019 9:00 AM
	Welcome to the Workplace -	7/8/2019 9:00 AM	7/9/2019 9:00 AM

2. Trainers

Add the column 'Trainer Names' by clicking on the button at the top right of the Course Dates 'Datagrid'

Run through the pages of the course dates Datagrid to sense check the course dates have the correct trainers assigned

3. Venues

Add the column 'Venue' by clicking on the button at the top right of the Course Dates 'Datagrid'

Run through the pages of the course dates Datagrid to sense check the course dates have the correct venues assigned



Resources

Your resources page will list each of your trainers, venues, and other resources which you require for your courses to run such as equipment and catering.

1. Total number of trainers

Access your system > Open the Resources page > apply the following filter to only display trainers

+ Add	Filters Views	Bulk Edit	Export	Search	Q -
Filters 👻	No filters defined, ple			+ New	2

Check the total result is the number of trainers you have available for your courses

	Trainer	 					
1 - 10 of 13 items	10 🔺 Per Page		<	Page	1	▲ of 2	>

2. My Teaching options for trainers

Right click on each trainer in turn, and click 'Edit'



Scroll down to their My Teaching options to ensure they have the correct level of access

My Teaching	
Full Access	4
Modify Course Status	
Generate Register and Sign-in Sheets	
Set Unavailability	
Modify Delegate Contact Details	
Add Delegates to Course Date	



3. Trainers and their associated courses

Right click on each trainer in turn, and click 'Course Templates'

Calendar		D
Categories		D
Course Templ	ates	
Files	Add	
Manage Shari	ng	D
Notes	Add	
Resources		

View their associated course templates to ensure each course they can be assigned to is included, and any courses they cannot be assigned to are excluded

Note: If no courses are listed, the trainer can be assigned to every course

Resource Course T	emplate Details	
Associated Course Templates		
Course Templates		
	•	Add
		Remove
	~	
		± Save

4. Total number of venues

Open the Resources page > apply the following filter to only display venues

Resource Maintenance		
+ Add Filters 1 /iews Bulk Edit Export	Search	Q -
Filters - No filters defined, please click the New Filter button		lew Filte 2 🗸 Apply
Type Label - 3 Contains - 4 Venue	5	- +



Check the total result is the number of venues you have available for your courses

	Training Room	In-House Venue	Learning & Development	0	GBP		Session	Yes	~
- 10	of 21 items 10 🔺	Per Page				<	Page 1	▲ of 3	>

5. Total number of other resources

Open the Resources page > apply the following filters to hide the venues and the trainers

Resource Maintenar	ice			
+ Add Filters Views	Bulk Edit Export		Search	Q -
Filters - No filters defined, please	e click the New Filter button		+	New Filter 🗸 Apply
Type Label 🗸	Does Not Contain 👻	venue		- +
Type Label 🗸	Does Not Contain 🗸	trainer		- +



Day to Day

1. Preparation

- Creating account for testing
- Creating users for testing
- Creating trainer for testing
- Creating courses for testing

Before starting to test your knowledge and understanding on the fundamental processes, please ensure with your implementation manager, that the workflows in your sandbox environment have been enabled:

1a. Account

Access your system > Open the Accounts page > click 'Add'

Account	Main	tenar	ice	
+ Add	Filters	Views	Bulk Edit	Export
C • Accou	nt Name 🖨			

Create a new account labelled 'Test' and assign it to any account group, you do not need to apply any contact or address details

1b. Users

Access your system > Open the Users page > click 'Add'

User Ma	User Maintenance						
+ Add	Filters	Views	Bulk Edit	Export			
Firet N	lamo ≜			Last Name :			

Create a new user called 'Booked User', with the email address of <u>bookinguser@test.com</u> and add them into the account 'Test' with the role of 'Individual'

Repeat this process for the following test users:

Name	Email Address
Transfer User	transferreduser@test.com
Cancelled User	cancelleduser@test.com
New User	newuser@test.com



Create a new user called 'Manager User', with the email address of <u>manageruser@test.com</u> and add them into the account 'Test' with the role of 'Customer Manager'

1c. Trainer

Access your system > Open the Resources 'Manage' page > click 'Add'

Resourc	Resource Maintenance							
+ Add	Filters	Views	Bulk Edit	Export				
	•			Tur				

Create a new External Trainer resource with the label 'Test Trainer', provide the trainer with a name and the email address of <u>trainer@test.com</u> and provide them with full access to the My Teaching menu options

1d. Courses

Access your system > Open the Courses 'Calendar' page > right click on a date in the calendar and click 'New Course'

	Colours: No	one 🔻 Hid	e sessional head cours	es: 🗌 Hide sessio	ons of sessional cours	se templates: 💽 Export T iCal
	▶ today	▼ Feb, 2017				Day Week Month
				Courses		
	Mon	Tue	Wed	Thu	Fri	Sat
30		31	1 Feb	2	3	4
					New Course	
6		7	8	9	10	11

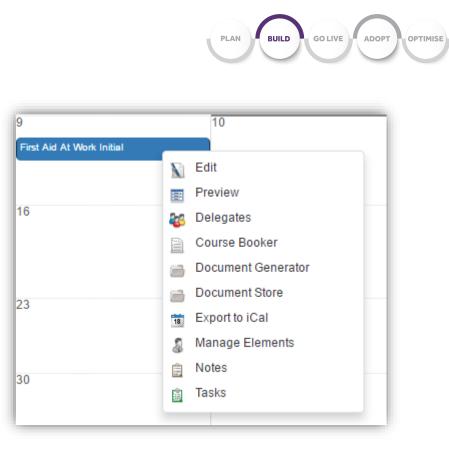
Create the new course selecting any course template set the cost to ± 0 , then select 'Test Trainer' as your course's trainer, select any venue

Repeat this process and schedule a course on the following day using the same course template and the same trainer



2. Booking Process

Access your system > Open the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Course Booker'



On the first stage of the shopping basket select to book ${\bf 3}$ delegates

Your basket					
Basket					
Use this section to edit or remove co	ourses from your bas	sket.			
Title	Location	Date	Candidates	Cost	
First Aid at Work Initial course details		01/03/2017 09:00:00	3 •		Remove course 💥
			Total		

On the second stage of the shopping basket click on 'Select another account' and select the Manager User as the booking user

Login	
The booker has an existing account	The booker is a new customer
Please select the account for which this booking is being made.	Register a new account and continue.
Booker: Select another account Select myself	Register and continue
Continue	•



One the third stage of the shopping basket select the following users as delegates

- Booking User
- Transfer User
- Cancelled User

Candidates				
Title	Location	Date	Candidates	Cost
First Aid at Work Initial				
Candidate 1: Candidate 2: Candidate 3:		01/03/2017 09:00:00	3 •]
Add candidate + Add myself +				
			Το	tal

Complete the booking

3. Delegate Management

3a. Transfer a delegate to another course

Access your system > Open the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Candidates'

w	ed			Thu
		2		
k Initial	N	Edit	First Aid at Work Initia	
		Preview		
	23	Candidates		
		Course Templat	te Booker	
	6	Document Gene	erator	
		Document Store	9	
	10	Export to iCal		

Right click on Transfer User and click on 'Transfer Delegate'

	PLAN BUILD GO LIVE ADOPT OPT
Change Delegate	
Create Invoice	
Create Credit Note	
Generate Documents	
Cancel Delegate	
Email	
Transfer Delegate	
Delete	

In the Transfer Delegate window select the transferred to date as the other course you scheduled in 1d

Original Course Templete	
Original Course Template	
First Aid at Work Initial: 01/03/2017 09:00 - 17:00	
Cost	
0.00	
Options	
Candidate *	
Transfer User ×	Select
Course Template *	
First Aid at Work Initial: 02/03/2017 09:00 - 17:00 \times	Select
Copy Source Notes	

Return to the Courses `Calendar' page > right click on the first date that you have scheduled in the calendar and select `Candidates'

Your delegate should now have the status of 'Transferred' on the first course

Course Template or Alias Name	Start Date 🗢	End Date 🗢	Status 🗢	
First Aid at Work Initial	01/03/2017 09:00	01/03/2017 17:00	Transferred	•

Return to the Courses 'Calendar' page > right click on the second date that you have scheduled in the calendar and select 'Candidates'

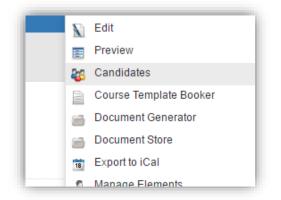
Your delegate should now have the status of 'Booked' on the second course



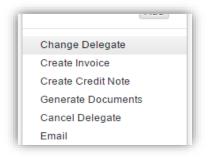
Course Template or Alias Name	Start Date 🗢	End Date 🗢	Status 🗢	
First Aid at Work Initial	02/03/2017 09:00	02/03/2017 17:00	Booked	•

3b. Change a delegate to another user

Access your system > Open the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Candidates'



Right click on Transfer User and click on 'Change Delegate'



Select 'New User' as the replacement delegate

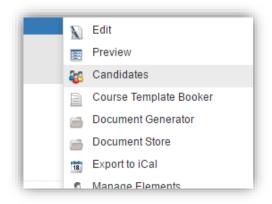
Select

Save and close



3c. Cancel a delegate

Access your system > Open the Courses 'Calendar' page > right click on the first date that you have scheduled in the calendar and select 'Candidates'



Right click on 'Cancel User' and click on 'Cancel Delegate'

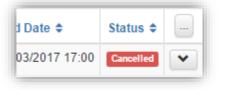
Tasks	Add
Change Delega	ate
Create Invoice	
Create Credit N	lote
Generate Docu	ments
Cancel Delega	te
Email	
Transfer Deleg	ate
Delete	

Add any applicable cancellation notes and confirm the cancel



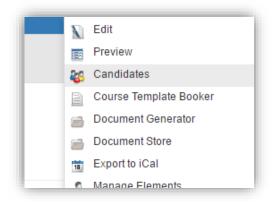
Cancel Delegate	×
Delegate Details	Ì
Candidate	
Cancel User	
Training Provider	
Learning & Development	
Course Template	
First Aid at Work Initial: 01/03/2017 09:00 - 17:00	
Cost	
£0.00 (inc. VAT)	
Options	
Cancellation Notes	
$ \begin{array}{ c c c c c } & & & & \\ \hline \hline & & & \\ \hline \hline \\ \hline & & & \\ \hline \hline \hline \\ \hline \hline \\ \hline \hline \hline \\ \hline \hline \hline \\ \hline \hline \hline \hline \\ \hline \hline \hline \hline \hline \\ \hline \hline \hline \hline \hline \hline \hline \hline \hline \\ \hline \hline$	
T!▼ ■▼ % ≦ X Ø ?	

Your delegate should now have the status of 'Cancelled' on the course



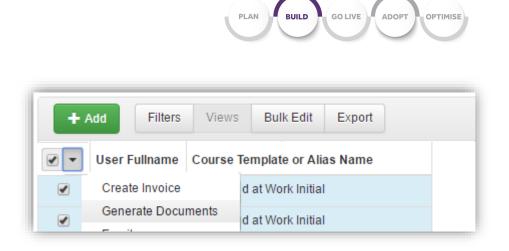
4. Document Generation

Access your system > Open the Courses 'Calendar' page > right click on the **first** date that you have scheduled in the calendar and select 'Candidates'



Select 'Booking User' delegate

Click on the multi-select options drop down button, click on 'Generate Documents'

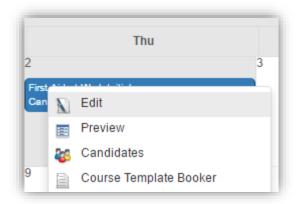


Select each document template in turn and View these being generated to ensure your documents are working as expected

Select
*
Select
•

5. Course Cancellation

Access your system > Open the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Edit'



Scroll down to the scheduling settings and change the course status from Available to Cancelled



Start Date *		
02/03/2017 09:00		
End Date *		
02/03/2017 17:00		
Duration		
1		
Duration Type		
Day		
Status *		
Available		
Cancelled Completed FullyBooked InProgress Available OnHold Failed Provisional		

Return to the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Preview'

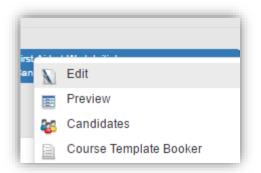
Preview	
Details	
Training Provider	Learning & Development
Course Template	First Aid at Work Initial
Date	02/03/2017 09:00 - 17:00
Venue	
Status	Cancelled
Delivery Method	
Duration	1 Day
L	

The course status will now be cancelled



6. Course Completion

Access your system > Open the Courses 'Calendar' page > right click on the **first** date that you have scheduled in the calendar and select 'Edit'



Scroll down to the scheduling settings and change the course status from Available to Completed

Scheduling	
* Start Date	01/03/2017 09:00
* End Date	01/03/2017 17:00
Duration	1
Duration Type	Day
* Status	Available
Delivery Method	Cancelled Completed FullyBooked InProgress
Number of Places	Available OnHold Failed
Maximum Places	Provisional

Access the list of delegates for the course date

1	Details
	Attributes
	Text
	Exclusivity
	Delegates
	Placeholders

Change Booking User's status to completed by clicking on 'Bulk Edit' Select the status field and select the status of completed, click Save



+ Add Filters	Views Bulk Edit	Export	Search	Q -
Status 🗸				
Completed				•
- +				
			Cancel	± Save
User Fullname	Course Template or Alia	as Name Start Date	e 🗢 🛛 End Date 🗢	Status 🗢 🗌

7. Moving a course

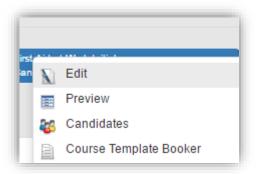
Access your system > Open the Courses 'Calendar' page > click on a course date to move it and drag it to another date in the calendar

Wed	Thu	
1 Mar	2	3
First Aid at Work Initial Candidates: 1		
8	9	10
15	16	17
	First Aid at Work Initial Candidates: 0	



8. Changing a trainer / venue on a course

Access your system > Open the Courses 'Calendar' page > right click on any course that you have scheduled in the calendar and select 'Edit'



Scroll down to the Resources section and click 'Select' to change the Trainer and/or Venue

Resources	
Trainers	
	Select
Venue	
	Select

Scroll to the bottom of the page and click Save

9. Logging in as a trainer

Access your system > Open the Users page > search for Test Trainer

Right click on Test Trainer and click 'Impersonate User'

IdSKS	Add
Job Roles	Add
Account Reset	
Email	
Impersonate Use	r
Send Credentials	;
Morgo	

Once logged in access My Account > My Teaching page to view their courses as a trainer



10. Logging in as a manager

Access your system > Open the Users page > search for Manager User Right click on Manager User and click 'Impersonate User'

IdSNS	Add
Job Roles	Add
Account Reset	
Email	
Impersonate User	
Send Credentials	
Morgo	

11. Logging in as a learner

Access your system > Open the Users page > search for Booking User Right click on Booking User and click 'Impersonate User'

IdSNS	Auu
Job Roles	Add
Account Reset	
Email	
Impersonate User	
Send Credentials	
Morgo	



Checking The Automated Emails

As you complete each part of the familiarisation guide, the automated communications will have been triggered but not sent out from the system. Within the communications page of your system you would expect to see a list which you can check over to ensure that content and styling is correct.

Search Q -	Communication Maintenance
Switch to Legacy System	+ Add Filters Bulk Edit Export
Switch to Portal	You do not yet have any filters defined for this DataGrid, to create a filter please click the More Filters button
n Dashboard	□ ▼ Date Created ◆ Subject ◆
🚰 Users	9/11/2019 9:00 AM Upcoming Coursey - First Aid at Work
Accounts	9/11/2019 9:00 AM Upcoming Coursey - First Aid at Work
Course Templates	9/10/2019 9:29 AM Upcoming Coursey - First Aid at Work
🛱 Courses <	9/10/2019 9:29 AM Upcoming Coursey - First Aid at Work
Resources	9/10/2019 9:29 AM Upcoming Coursey - First Aid at Work
	9/10/2019 9:29 AM Upcoming Coursey - First Aid at Work
Products & Services	9/12/2019 4:04 PM New Invoice
Opportunities	9/5/2019 9:00 AM Upcoming Coursey - First Aid at Work
Finance <	9/5/2019 9:00 AM Upcoming Coursey - First Aid at Work
Tasks	9/11/2019 3:19 PM Welcome!
Communications	1 - 10 of 1471 items 10 - Per Page
Notes	

To view the content, right click on a communication and select the preview option

Content	
Subject Content	Upcoming Course - First Aid at Work Dear Stuart Grice Thank you for registering on to our First Aid at Work course on 18/09/2019 09:00:00 As a reminder, your course will be held at Learning Room, Learning Room 14 Spring Garden St Lancaster LAncaster LA1 1RQ If you are no longer able to attend the course, please contact us as soon as possible on 0123456789 Many thanks,
	POWERED BY CCCESSPLANIT Software for training businesses



Removing Test Data

1. Deleting Delegates & Courses

Access your system > Open the Courses 'Calendar' page > right click on either course that you have scheduled in the calendar and select 'Candidates'

Select all delegates listed on the course and Delete them

D	Create Invoice Generate Documents Email	na	nce		
	Delete	WS	Bulk Edit	Export	
	User Fullname Co	ourse Te	mplate or Ali	as Name	St

Repeat this for the other scheduled course in the calendar

Access your system > Open the Courses 'Class' page > right click on either course and click 'Delete'

Add to Basket
Generate Documents
Generate Register
Generate Sign-in Sheet
Merge
Delete

Repeat this for the other scheduled course

2. Deleting Trainer

Access your system > Resources 'Manage' > search for Test Trainer Right click on Test Trainer and click 'Delete'

	PLAN BUILD GO LIVE ADOPT OPT
manage onamig	
Notes Add	
Resources	
Unavailability Add	
Email	
Delete	

3. Deleting Users & Account

Access your system > Users > search for 'Booked User' Right click on Booked User and click 'Delete'

	- 10
Account Reset	
Email	- 18
Impersonate User	- 18
Send Credentials	- 11
	-11
Merge	- 11
Delete	- 1
Delete	

Repeat this for

- Transfer User
- Cancelled User
- New User
- Manager User

Access your system > Accounts > search for 'Test'

Right click on Test and click 'Delete'

INULES	Add
Other Addresses	
Tasks	Add
Merge	
Delete	