

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.

Build

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

Plan

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.



Set-up

Users

- Total number of users
- Correct permission set assigned
- Belong to the correct Account
- Email addresses

Accounts

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

Course Templates

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

Resources

- Total number of trainers
- My Teaching options for trainers
- Trainers and their associated courses
- Total number of venues
- 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
 - 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







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

Plan

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

Use	er Maintenance	e			
+	Add Filters View	s 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	~
1 - 1	of 77 items 10 🔺 Per P	lage		✓ Page 1 ▲ of 8 3	•

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

Plan

+ Add Filters 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 Label - Equal To - Training Administrator	5 - +
Му	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'

Main Role Label 🗢 🛛
Last Name
Latest Course Attended
Latest Course Booked
Main Account End Date
Main Account Name
Main Account Start Date
Main Role ID
Main Role Label
Main User Account ID
Main User Account Name
Main User Type Label

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



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	h Q -
Filters Type the name of a filter to apply or use the Filter button	+ New Filte Apply 5
Email Address - Is Empty - 4	- +
My Filter	Delete Cancel + Save



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.

Build

Launch

<u>Optimise</u> Maximise

Plan

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	-
•	Account Name 🗢	Town \$	Phone Number 🖨	En	Email Address 🗢	
	Accessplanit Test		084525487514	ab	abcindustries@testemail.com	
	Accessplanit Test					
	Accessplanit Company Test	Blackpool		tes	st@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'

	Apply	Î
Account Group IDs		
Account Group Names		
Account ID		
Account Manager ID		
Account Manager 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

Plan

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

Cou	irse Template Maintenance				
+ /	Add Filters Views Bulk Edit Export		Search	1	Q -
-	Label 🗢	Training Provider \$	Course Template Type	e	
	Acceptance Test Document Course	accessplanit Training	Knowledge Documents	1	
	Acceptance Test Class Course	Testing Company	Class		
	Acceptance Test ELearning Course new	accessplanit Training	E Learning		
	Accesplan Class Course	accessplanit Training	Class	In House	•
1 - 10 0	Accesplan Class Course	accessplanit Training	Class	In House	•

2. 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'



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

Search			۹	•
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'

Plan



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

3. 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

4. Course durations and sessions plans



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



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	dit Export			Search	Q	-
-	Mapped Course Template Name 🗢	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	

5. Categories

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



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

6. Course text

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





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.

Plan

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, pl	ease click the N	lew Filter butto	l	+ New F	ilter Apply

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'

	Cost 🖨	Currency Code 🖨	Co		
	0	GBP	1		
	Edit				
¢.	Preview	Preview			
2	Awards				
	Attribute	es			

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

my reaching	
Full Access	1
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 Templates	
Files Add	
Manage Sharing	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 Templat	te 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 J/iews Bulk Edit Export	Search Q -
Filters Vo filters defined, please click the New Filter button	+ New Filter 2 Apply 6
Type Label - Contains - 4 venue	5 - +



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

Plan

Π		Training Room	In-House Venue	Learning & Development	0	GBP		Session	Yes	•
	1 - 10 0	of 21 items 10 🔺 Pe	er 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	ce			
+ Add Filters Views	Bulk Edit Export	S	earch	۹
Filters - No filters defined, please	click the New Filter button		+ New Filter	🗸 Apply
Type Label 🗸	Does Not Contain 🗸	venue		F
Type Label 🗸	Does Not Contain 🗸	trainer		F



1. Preparation

• Creating account for testing

Plan

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

To test your system and your processes without the risk of sending emails to your real users, please create the following:

Build

🔪 Launch 🌔 Optimise 🔪 Maximise

1a. Account

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

Account Maintenance					
+ Add	Filters Views		Bulk Edit	Export	
Account 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 Maintenance							
+ Add	Filters	Views	Bulk Edit	Export			
Firet Name ≜ 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	ce Ma	intena	ance	
+ Add	Filters	Views	Bulk Edit	Export
	•			Ти

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'

		• ▼ Hide	sessional head course	es: 🗌 Hide session	s of sessional course te	mplates: 🗹 Export To iCal
• •	today	▼ Feb, 2017			Da	y Week Month
				Courses		
N	lon	Tue	Wed	Thu	Fri	Sat
30	31		1 Feb	2	3	4
					New Course	
6	7	1	8	9	10	11

Create the new course selecting any course template set the cost to $\pounds 0$, 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'



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9		10
First Aid At Work Initial	-	
	N	Edit
		Preview
16	20	Delegates
		Course Booker
	6	Document Generator
23		Document Store
23	18	Export to iCal
	2	Manage Elements
20	🚊	Notes
30	÷.	Tasks

On the first stage of the shopping basket select to book **3** delegates

Your basket					
Basket					
Use this section to edit or remove c	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

The booker has an existing account	The booker is a new customer
Please select the account for which this booking is being m	ade. Register a new account and continue.
Booker:	Register and continue

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





- Booking User
- Transfer User
- Cancelled User

Candidates				
Candidates				
Title	Location	Date	Candidates	Cost
First Aid at Work Initial course details				
Candidate 1: Candidate 2: Candidate 3:		01/03/2017 09:00:00	3 •]
Add candidate + Add myself +				
			То	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		Fin	st Aid at Work Initial	
	N	Edit		
		Preview		
andidates 😵				
		Course Template	late Booker	
		Document Genera	ator	
		Document Store		
	12	Export to iCal		

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



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

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 🖨	
1	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



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.035						

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
ave & Close



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 Dele	gate
Create Invoice	e
Create Credit	Note
Generate Doc	cuments
Cancel Deleg	ate
Email	
Transfer Dele	gate
Delete	

Add any applicable cancellation notes and confirm the cancel



Cancel Delegate X Austranoppo	
Delegate Details	*
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	
\mathcal{V} · B I \underline{U} \mathcal{I} Helvetica · 12· A · IE IE IE	
TI- H- % A X 4> ?	

Build

Launch

> Optimise > Maximise

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'



+ /	Add	Filters	Views	Bulk Edit	Export
•	User Ful	llname	Course	Template or Ali	as Name
	Create	Invoice		d at Work Initia	I
	Genera	te Docun	nents	d at Work Initial	1
				a at work initia	•

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

Launch > Optimise > Maximise

* Document Template	Certificate of Training ×	Select
* Output Format	PDF	,
Sources	User Course Date 👻	Select
* Generation Type	View	
Exclude Previous Recipients		

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



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

Build

Launch > Optimise > Maximise

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

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

(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



>Build >	Launch	Optimise	>Maximise
----------	--------	----------	-----------

+ Add Filters	Views Bu	ulk Edit Export	Sea	rch	Q -
Status 🗸					
Completed					•
- +					
				Cancel	+ Save
User Fullname	Course Templa	ite or Alias Name	Start Date 🗢	End Date 🗢	Status 🗢 🕒

Checking Communications

Within the communications page of your system you would expect to see the following communications, subject to the communications defined during your implementation:

- Booking Confirmations to Booking User, Transfer User & Cancelled User for course one
- Transfer Confirmation to Transfer User for course one
- Booking Confirmation to Transfer User for course two
- Booking Confirmation to New User for course two
- Cancellation Confirmation to Cancelled Candidate for course one
- Course Cancelled Notification to New User for course two
- Course Completed Notification to Booking User for course one

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
15		
	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'

irst		
an	N	Edit
		Preview
	23	Candidates
		Course Template Booker

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	Auu
Job Roles	Add
Account Reset	
Email	
Impersonate Use	r
Send Credentials	5
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

Plan

Right click on Manager User and click 'Impersonate User'

TdSN5	Add
Job Roles	Add
Account Reset	
Email	
Impersonate Use	r
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	Add
Job Roles	Add
Account Reset	
Email	
Impersonate User	
Send Credentials	
Morgo	

Removing Test Data

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	nance			
	Delete	WS	Bulk Edit	Export	
	User Fullname Co	urse 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 Bas	ket	
Generate [ocuments	
Generate F	legister	
Generate S	ign-in Sheet	
Merge		
Delete		

Repeat this for the other scheduled course

Deleting Trainer

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

manage onam	'Y
Notes	Add
Resources	
Unavailability	Add
Email	
Delete	
-	

Deleting Users & Account



Access your system > Users > search for 'Booked User'

Right click on Booked User and click 'Delete'

Account R	eset	
Email		
Impersona	ate User	
Send Cree	dentials	
Merge		
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'

NULES	Add
Other Addresses	
Tasks	Add
Merge	
Delete	