Familiarisation Guide

accessplanit

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

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

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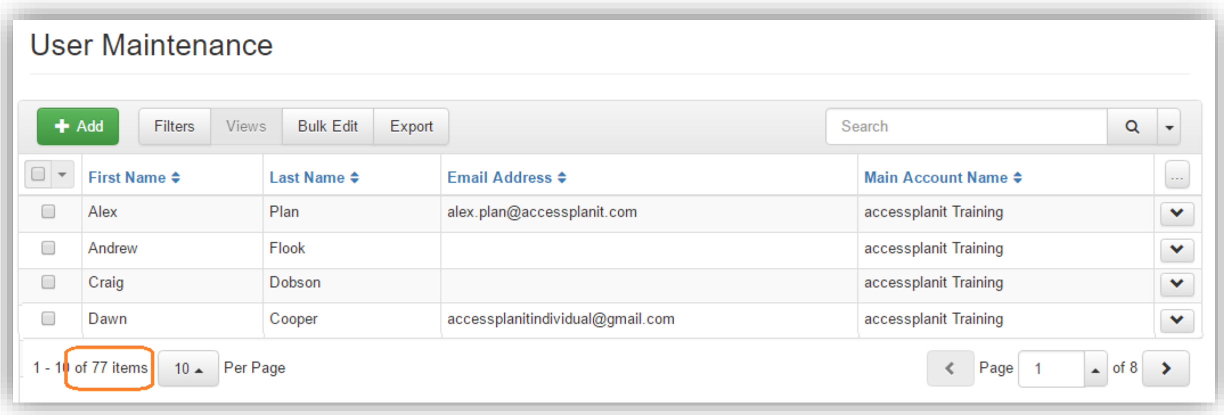
Set-up

Users

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

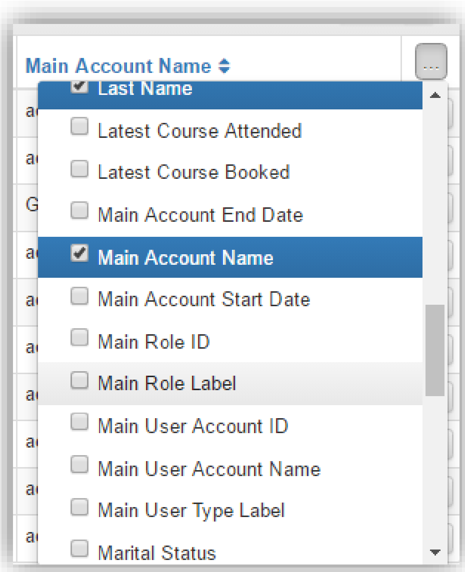
1. Total number of users

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



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:

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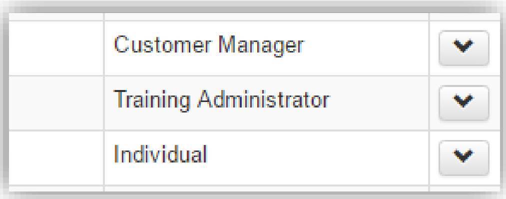
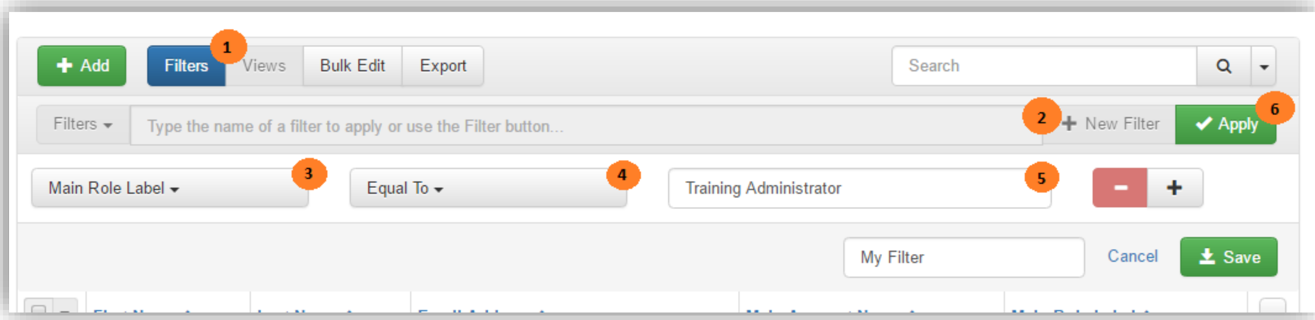
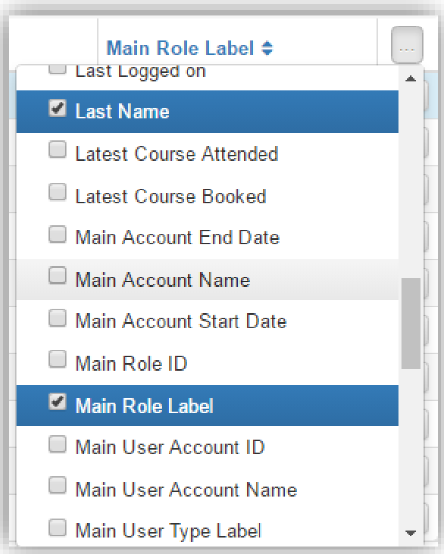


Advanced: Filter the User Datagrid to show you a list of users per permission set



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

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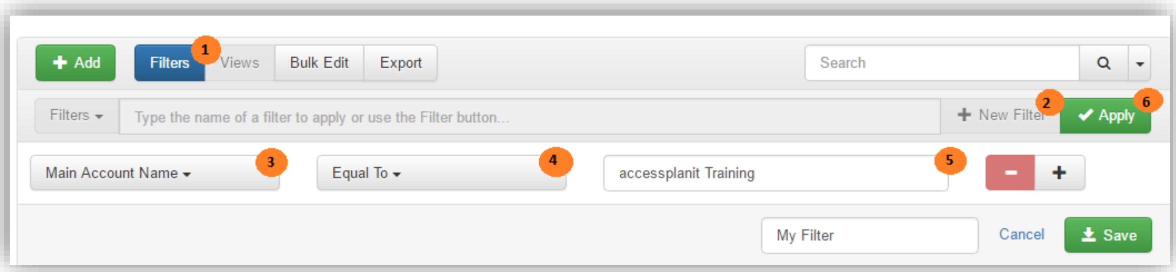
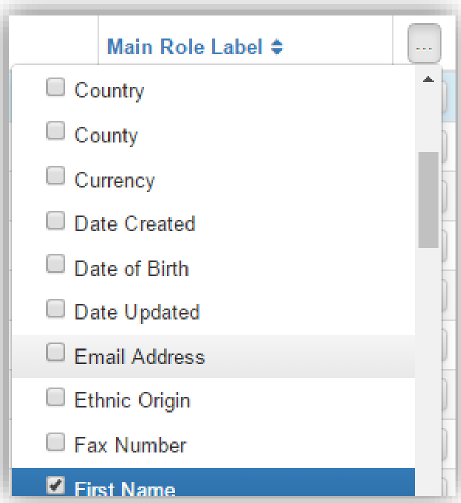


4. Email addresses

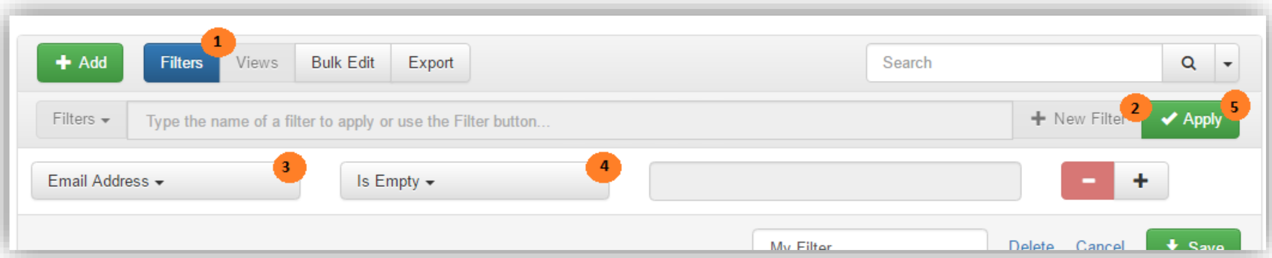
Add the column 'Email Address' by clicking on the ... button at the top right of the User 'Datagrid'



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



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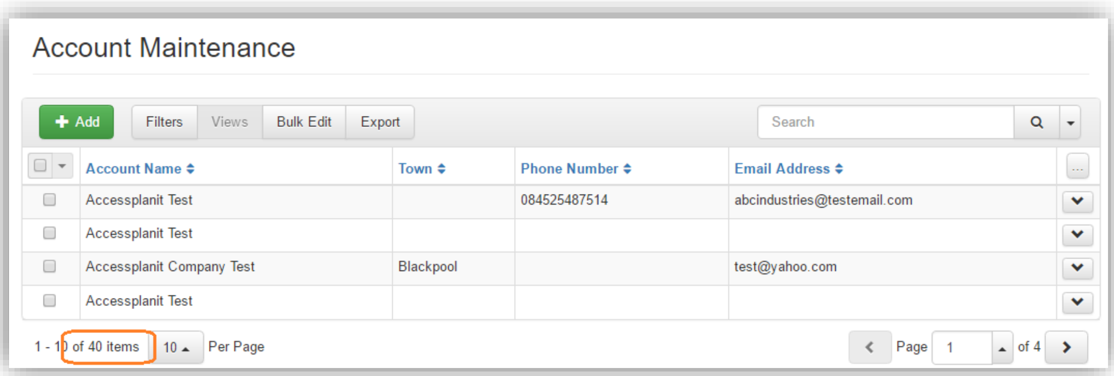
Accounts

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.

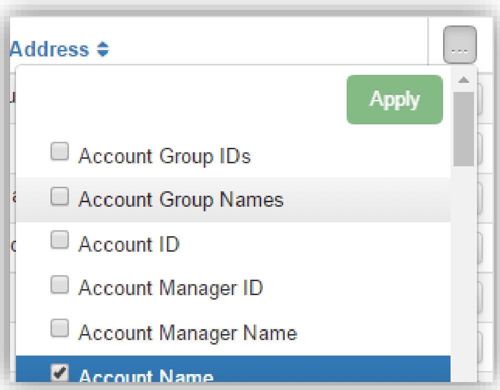
1. Total number of accounts

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



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'



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

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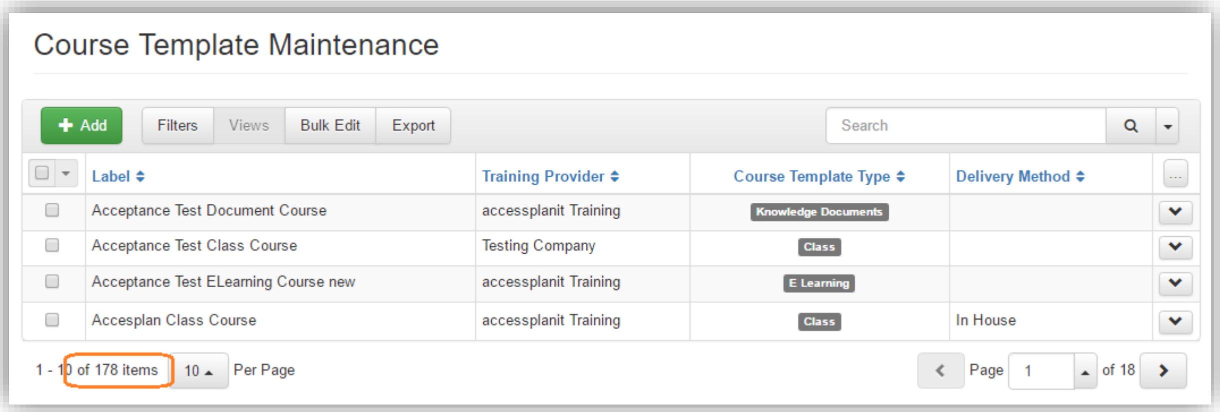
Course Templates

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.

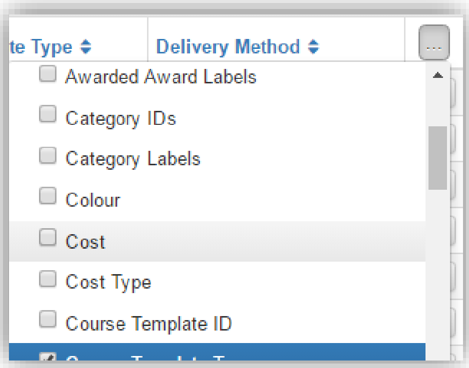
1. Total number of course templates

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



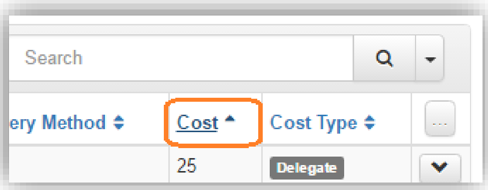
2. Course template costs and (if present) price schemes

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



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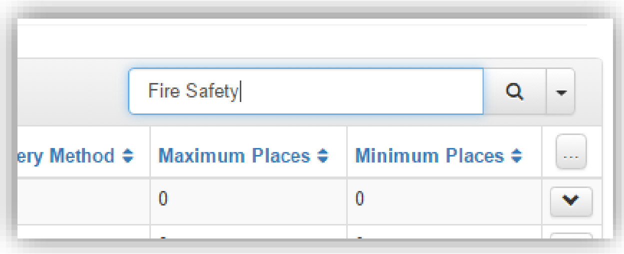
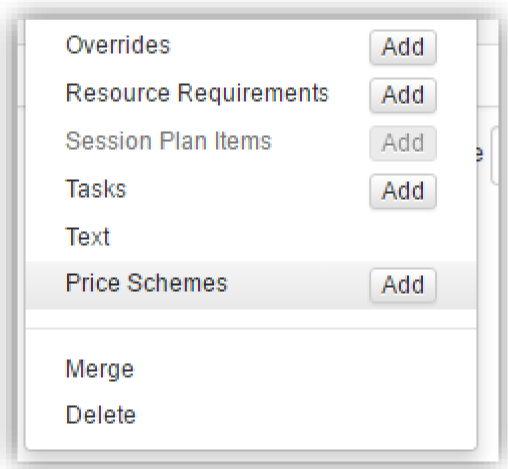
Search for course templates which should have different costs for different types of users



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

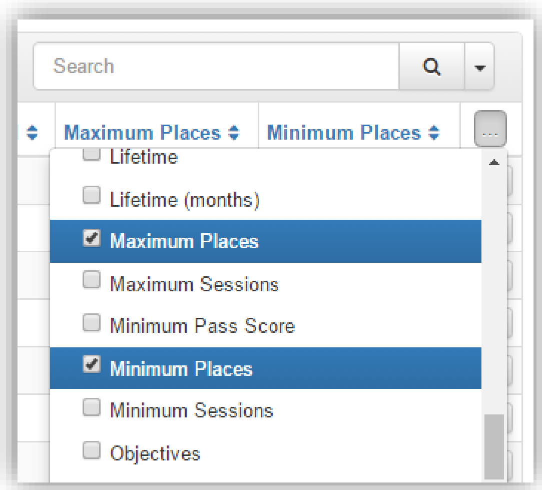


Check that the alternative lower costs for the course are listed as price schemes

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

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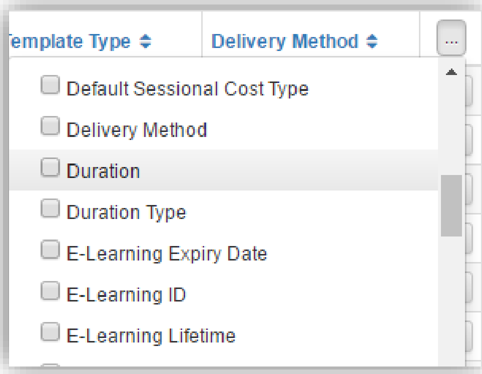
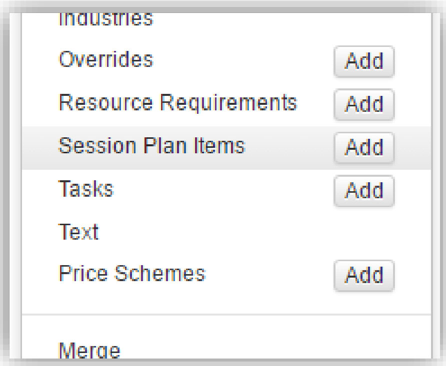
Add the columns 'Duration', 'Duration Type' and 'Sessional' by clicking on the ... button at the top right of the Course Template 'Datagrid'

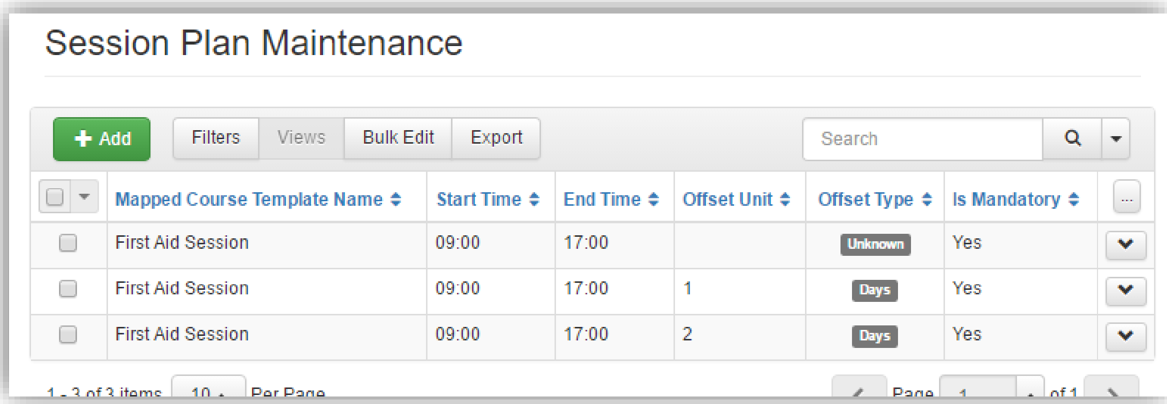


Run through the pages of the course templates Datagrid to sense check the course templates have the correct durations, and that your multi-day courses are sessional

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



Check the sessions plan is as expected



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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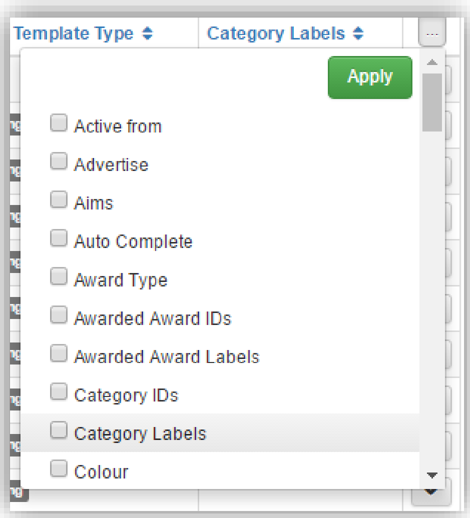
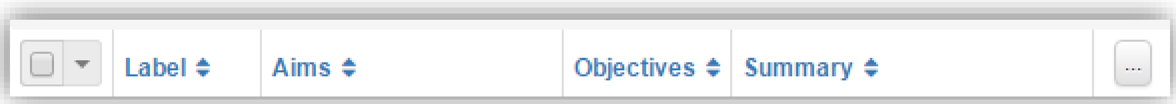


Run through the pages of the course templates Datagrid to sense check the course templates have the correct categories assigned

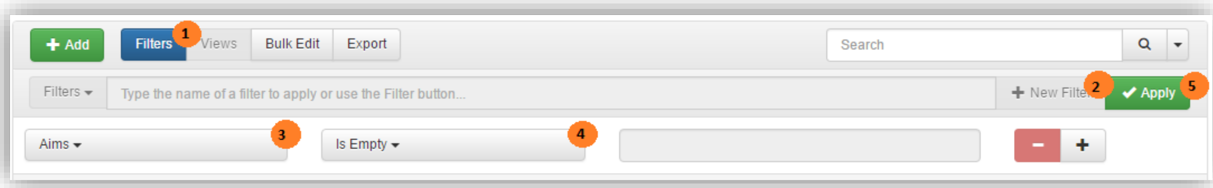
6. Course text

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



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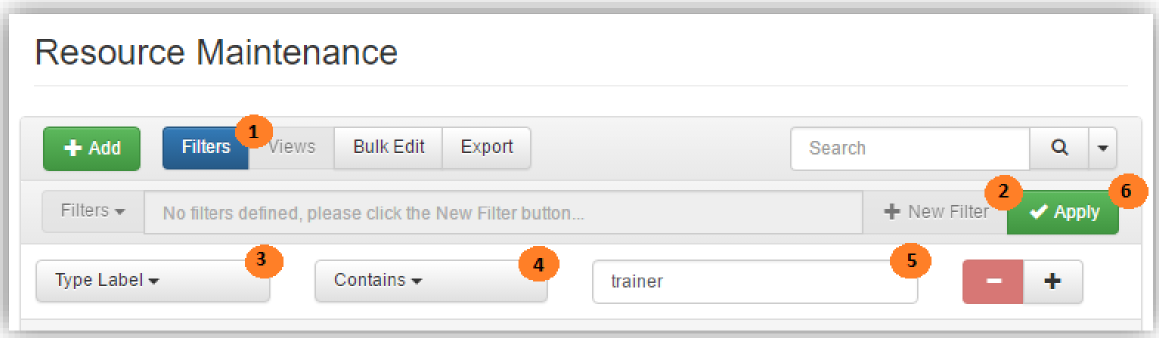
Resources

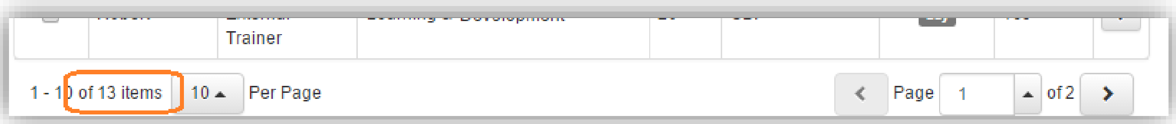
Your resources page will list each of your trainers, venues, and other resources which you require for your courses to run such as equipment and catering.

1. Total number of trainers

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

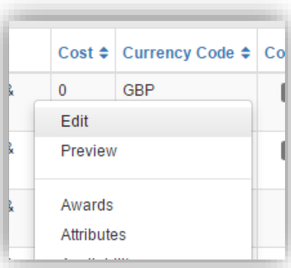


Check the total result is the number of trainers you have available for your courses

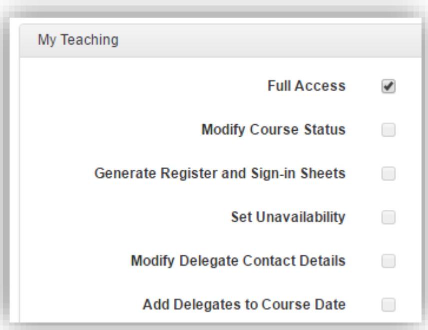


2. My Teaching options for trainers

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



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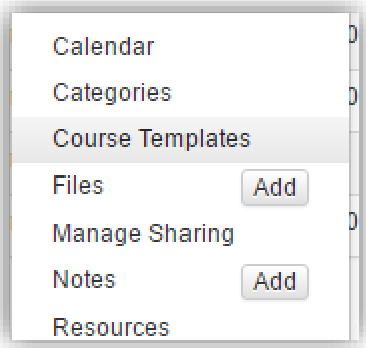
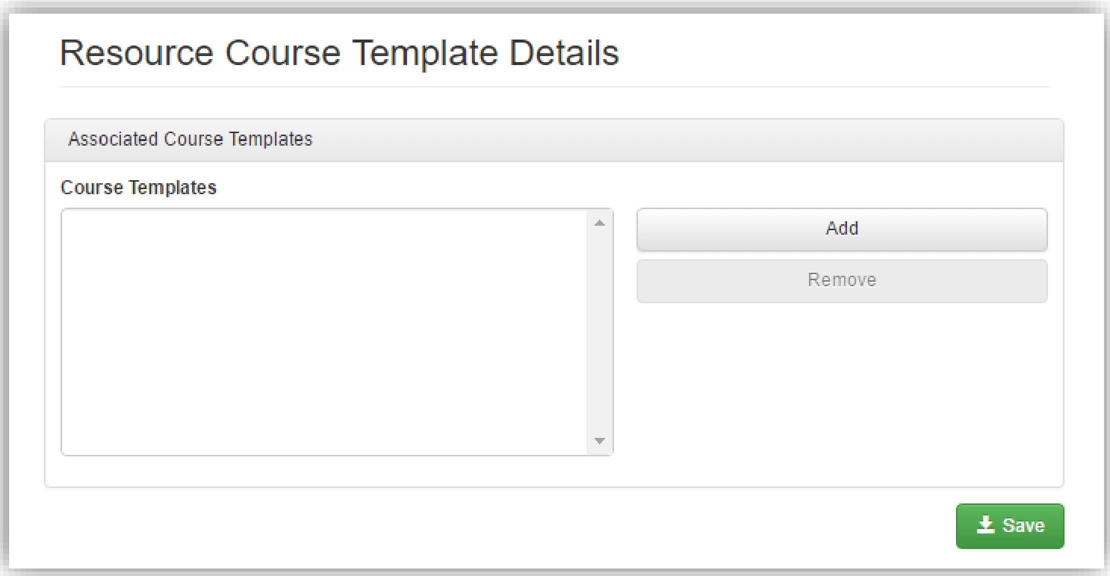
3. Trainers and their associated courses

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



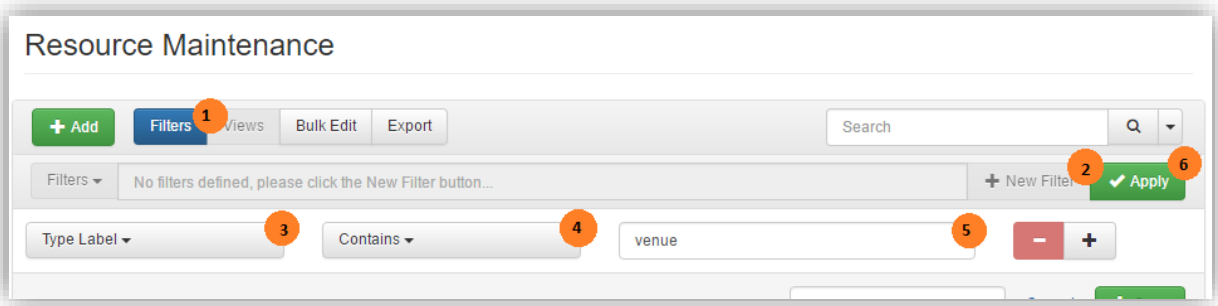
View their associated course templates to ensure each course they can be assigned to is included, and any courses they cannot be assigned to are excluded

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



4. Total number of venues

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



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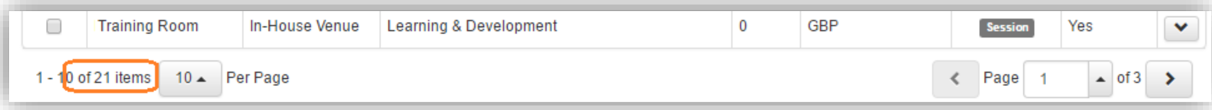
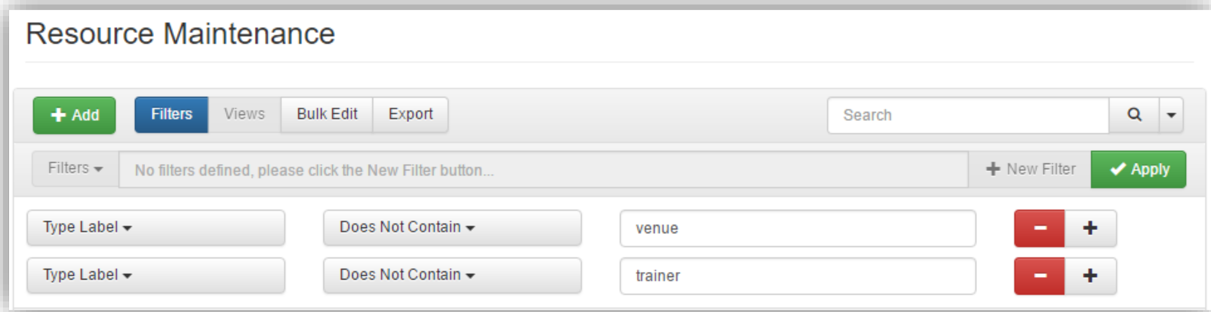
Check the total result is the number of venues you have available for your courses



5. Total number of other resources

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



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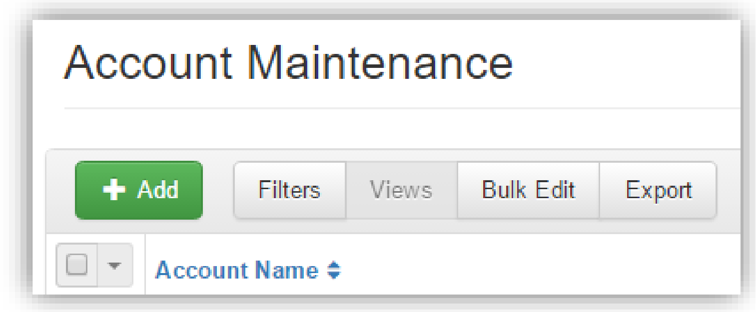
Day to Day

1. Preparation
- Creating account for testing
- 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:

1a. Account

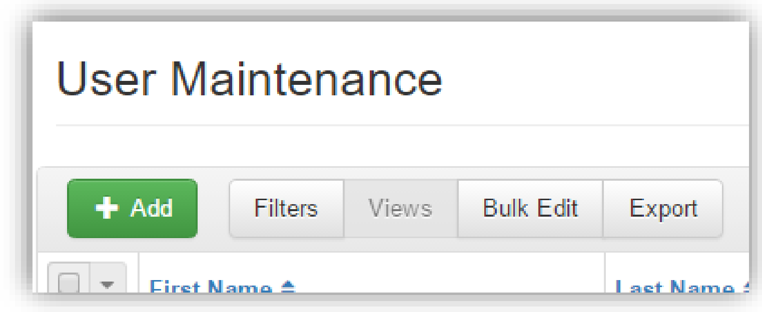
Access your system > Open the Accounts page > click 'Add'



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'



Create a new user called 'Booked User', with the email address of bookinguser@test.com 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

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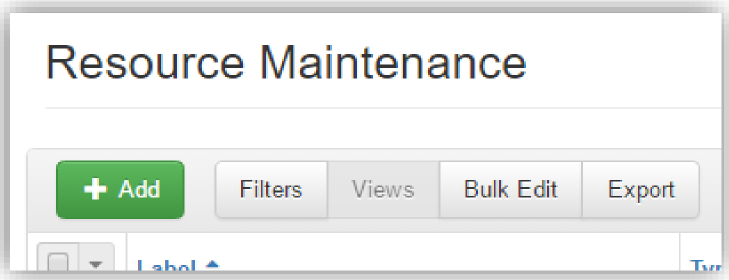
Create a new user called 'Manager User', with the email address of managersuser@test.com and add them into the account 'Test' with the role of 'Customer Manager'

1c. Trainer

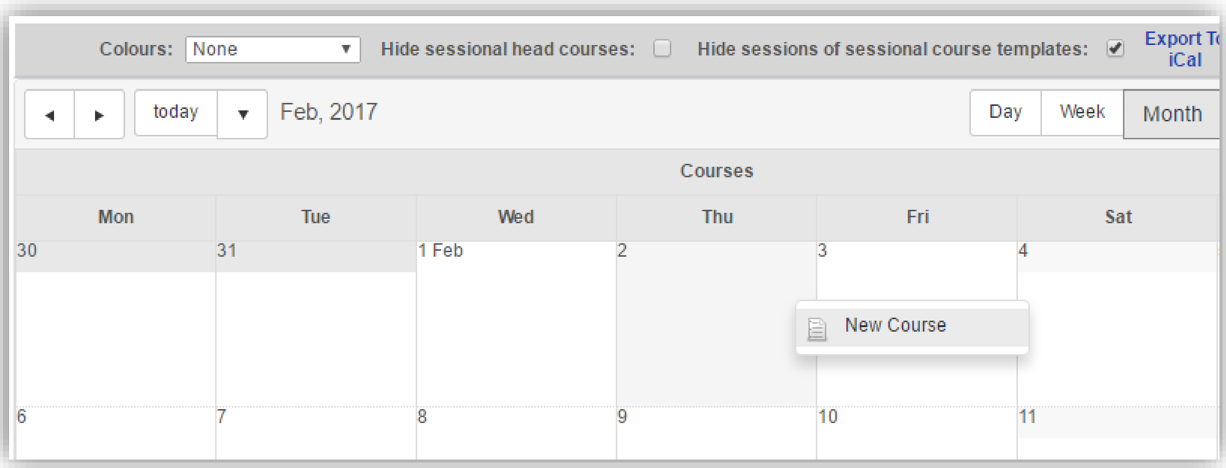
Access your system > Open the Resources 'Manage' page > click 'Add'



Create a new External Trainer resource with the label 'Test Trainer', provide the trainer with a name and the email address of trainer@test.com 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'



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'

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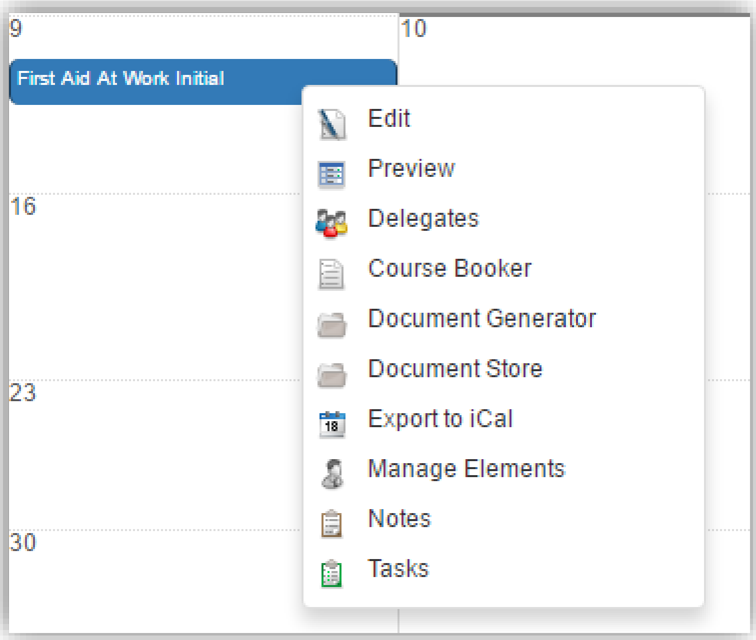
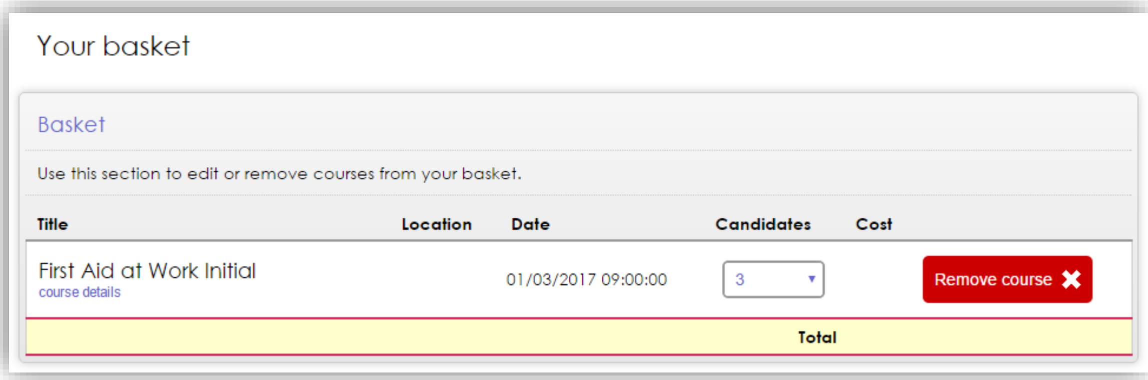
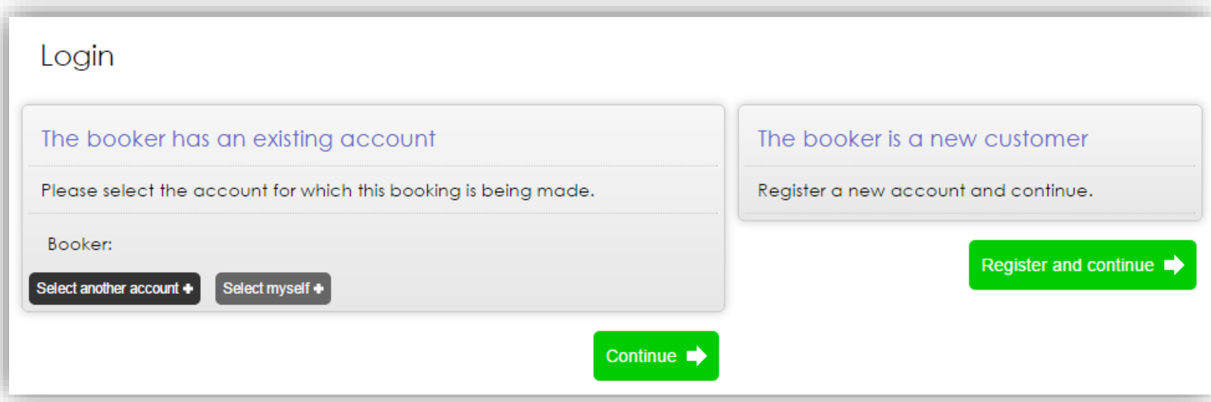


On the first stage of the shopping basket select to book **3** delegates



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



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

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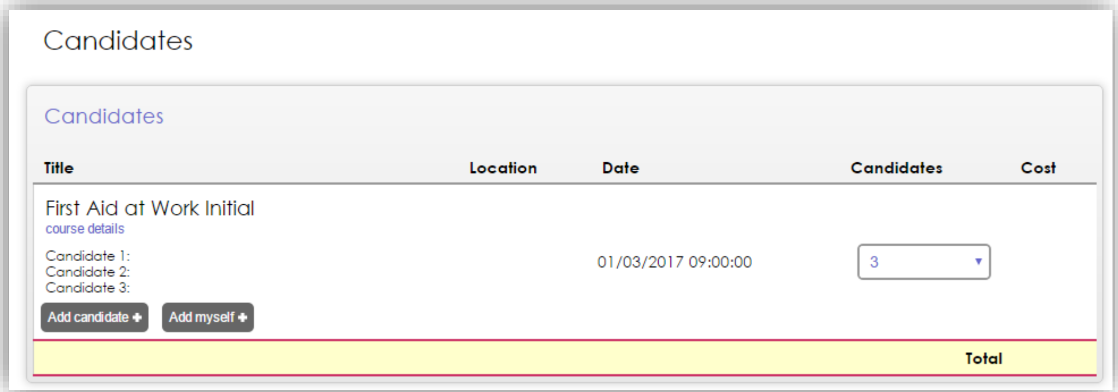
- Booking User
- Transfer User
- Cancelled User

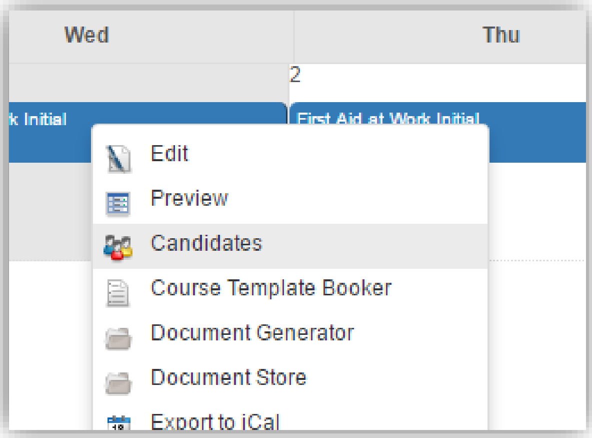


Complete the booking

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'



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

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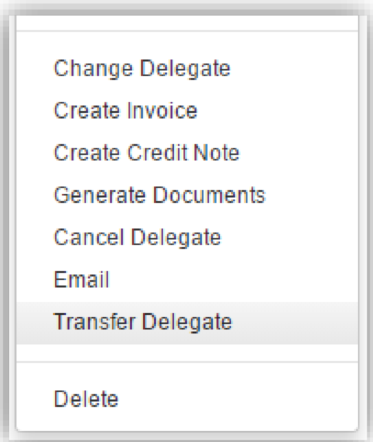
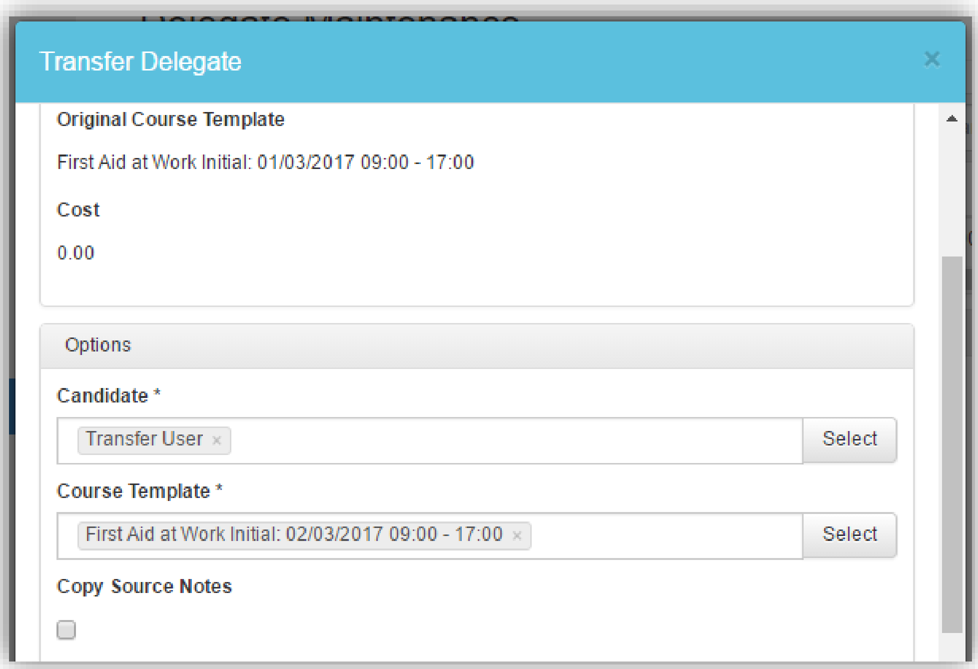
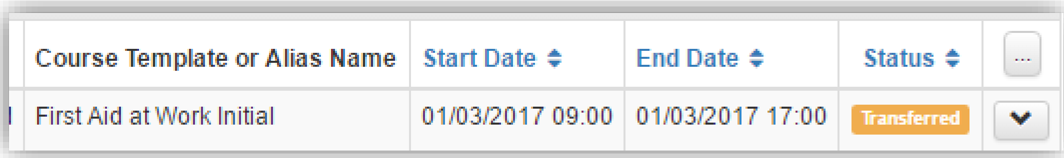


In the Transfer Delegate window select the transferred to date as the other course you scheduled in 1d



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



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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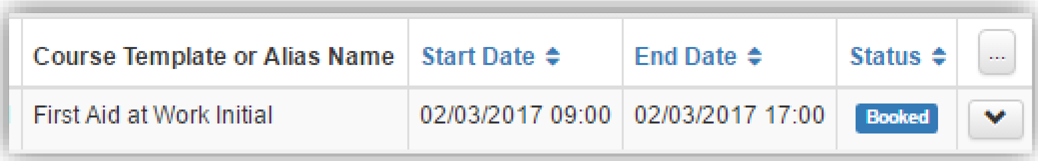
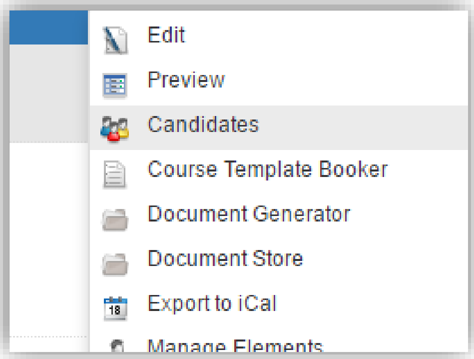
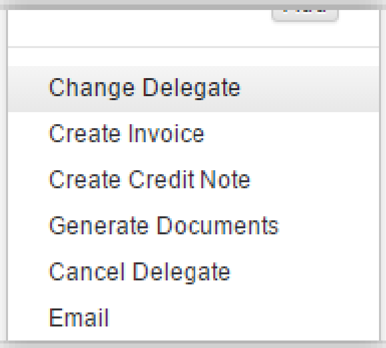


3b. Change a delegate to another user

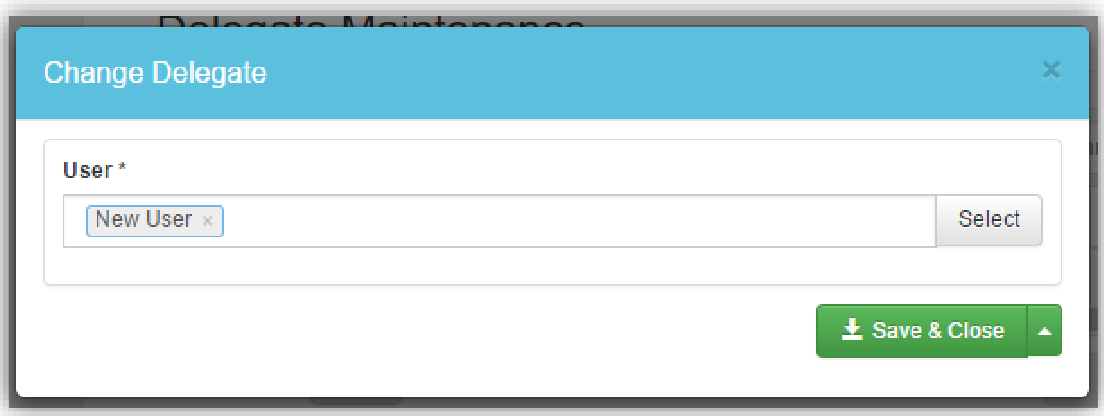
Access your system > Open the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Candidates'



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



Select 'New User' as the replacement delegate



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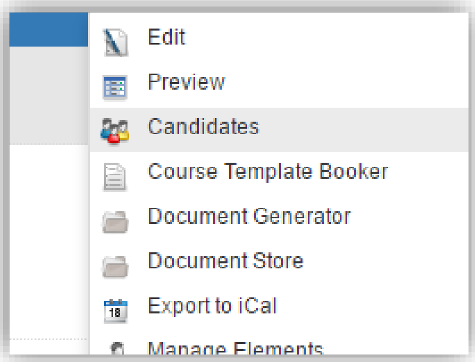
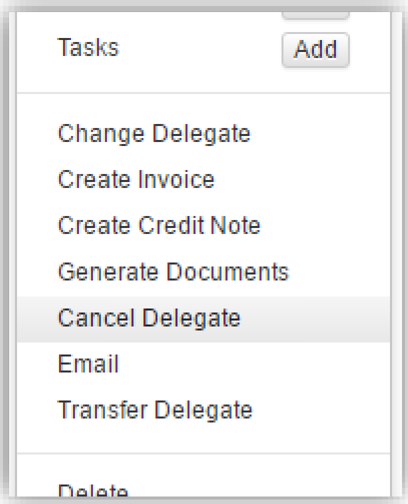
Save and close

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'



Add any applicable cancellation notes and confirm the cancel

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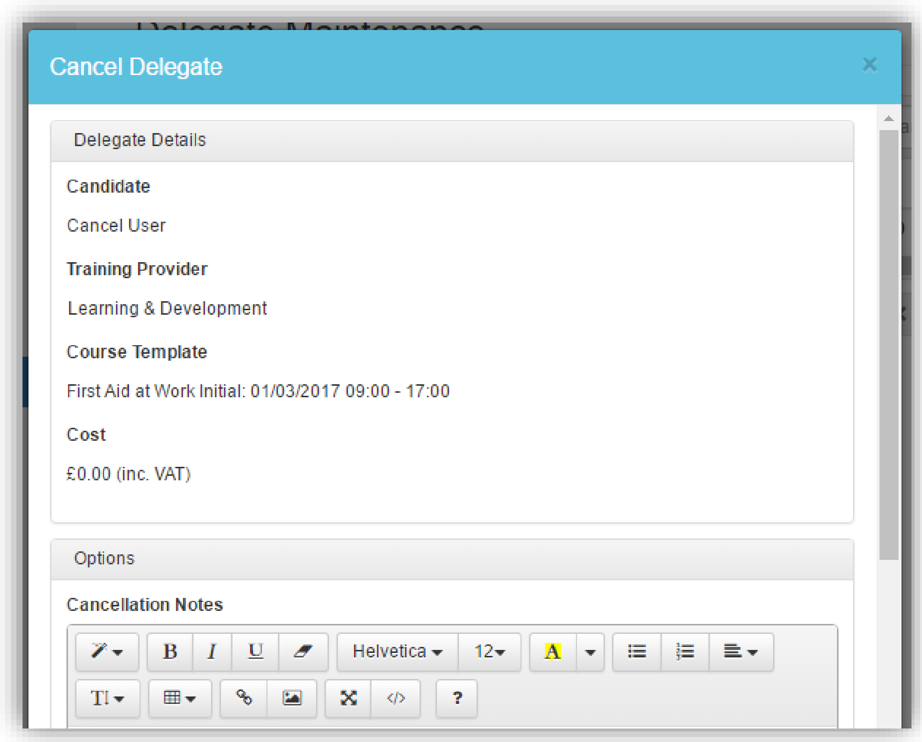
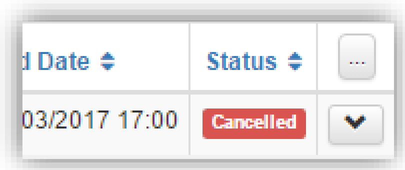
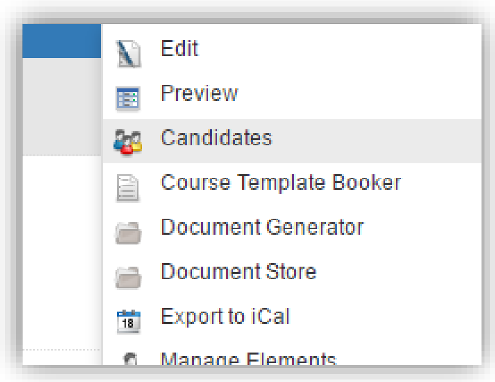


Your delegate should now have the status of 'Cancelled' on the course



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'

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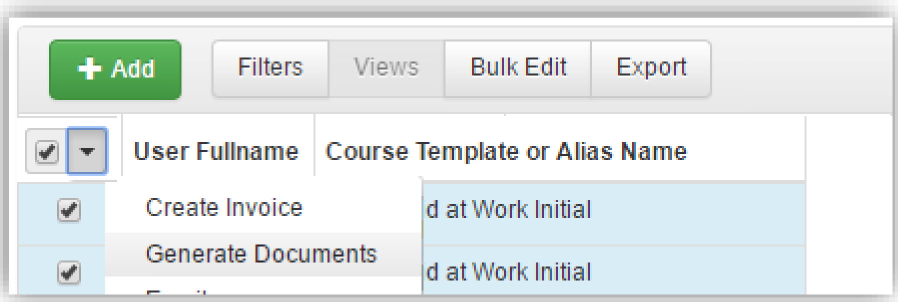
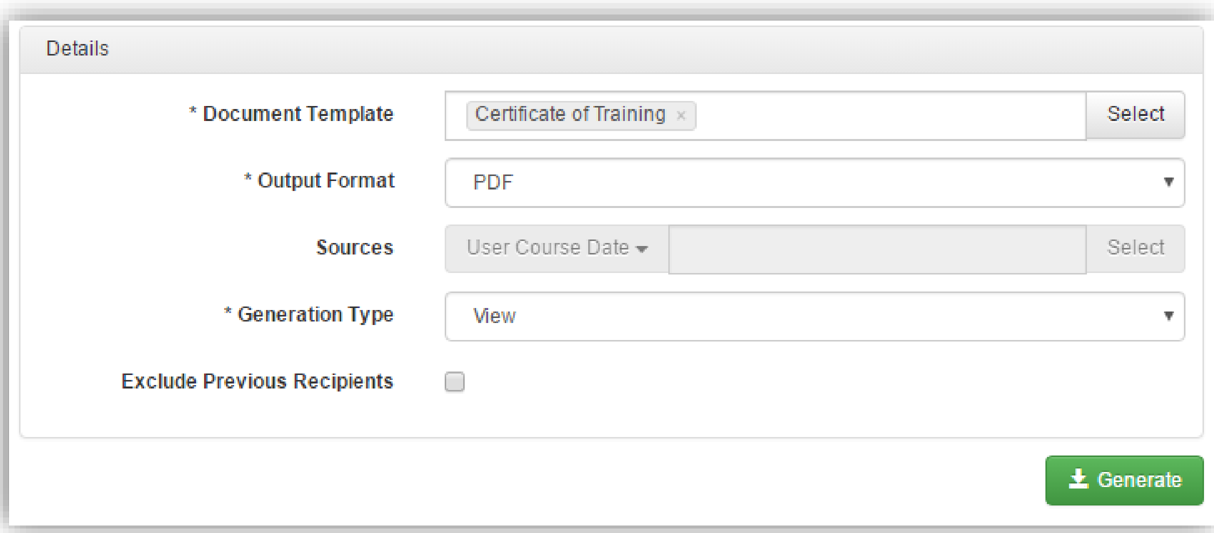
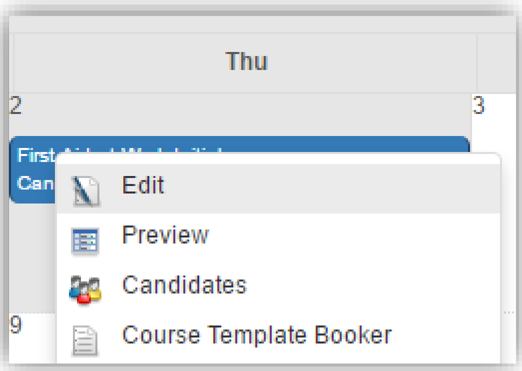


Select each document template in turn and View these being generated to ensure your documents are working as expected



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

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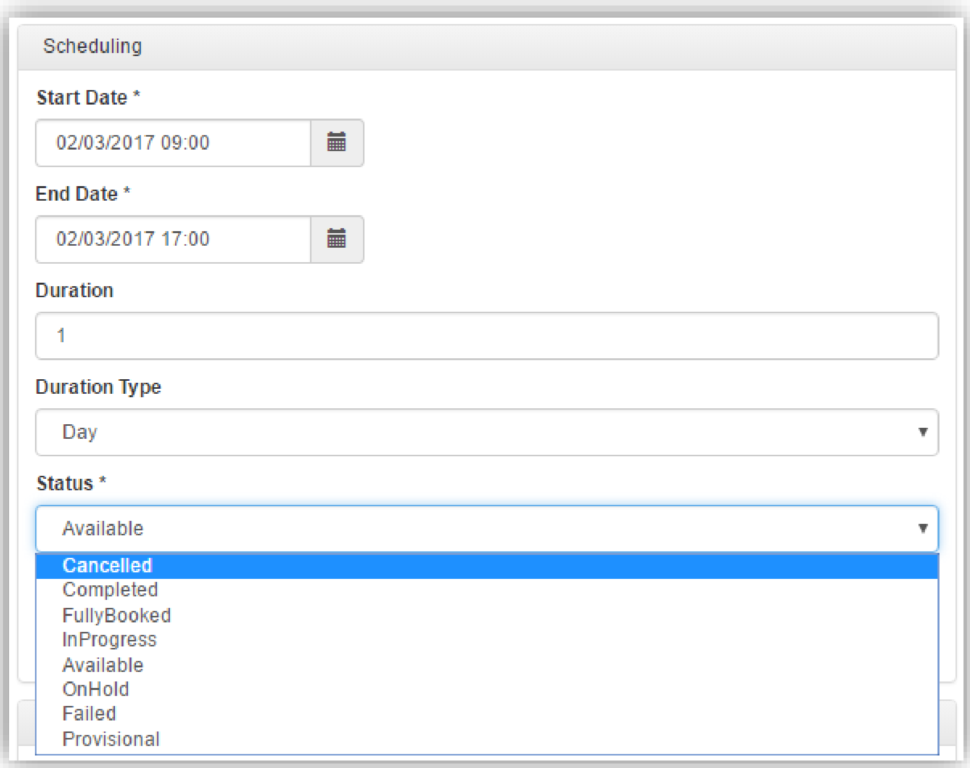
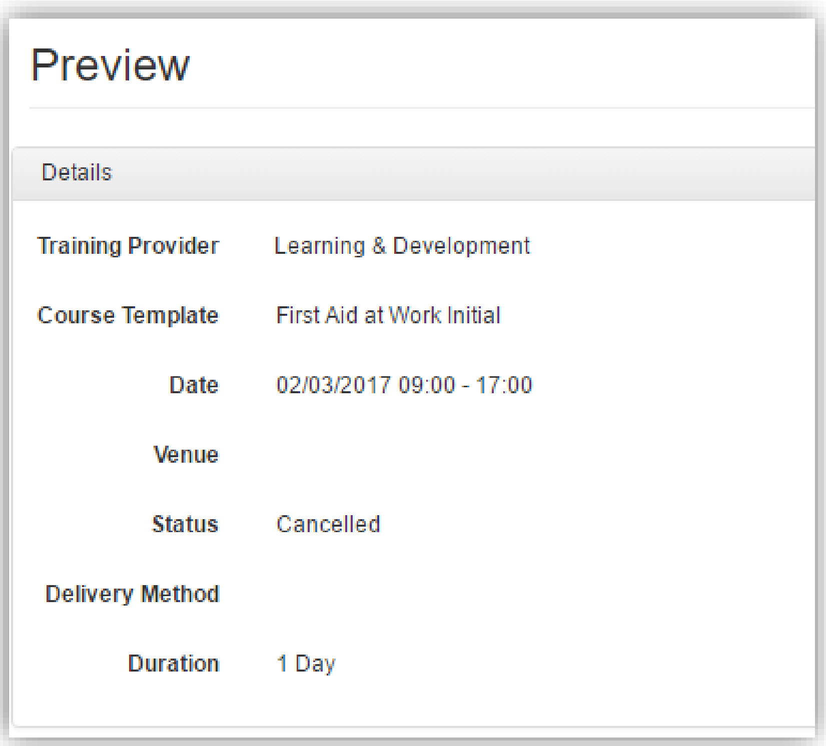


Return to the Courses 'Calendar' page > right click on the **second** date that you have scheduled in the calendar and select 'Preview'



The course status will now be cancelled

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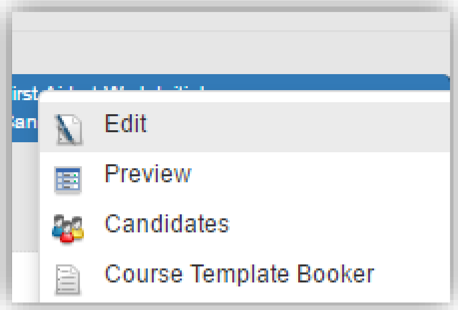
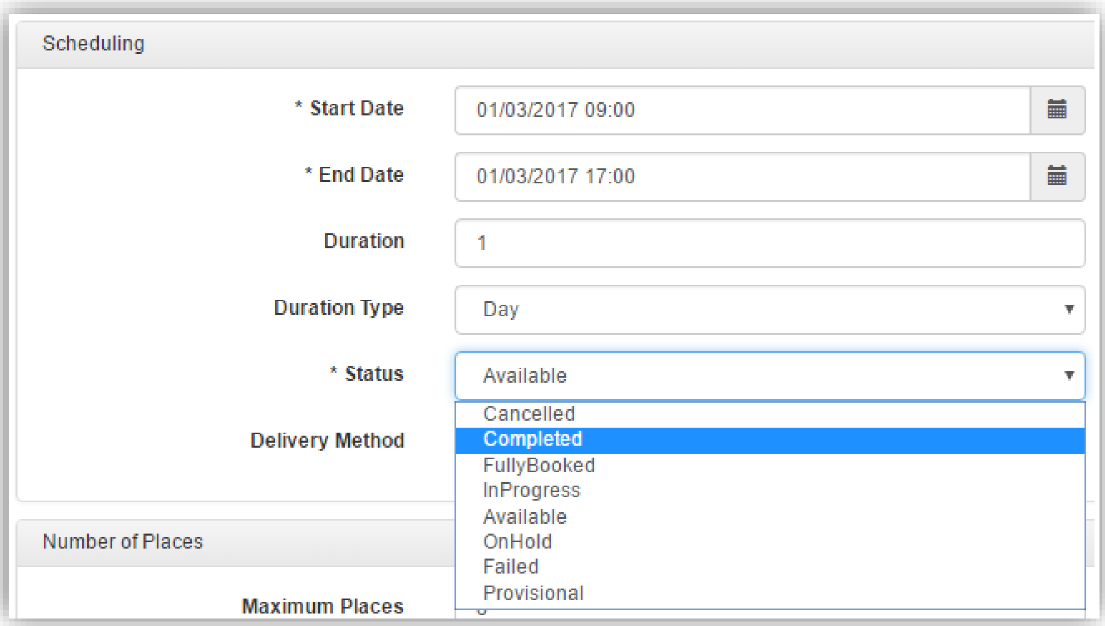
6. Course Completion

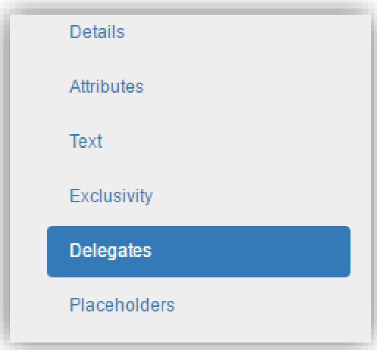
Access your system > Open the Courses 'Calendar' page > right click on the **first** date that you have scheduled in the calendar and select 'Edit'



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



Access the list of delegates for the course date



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

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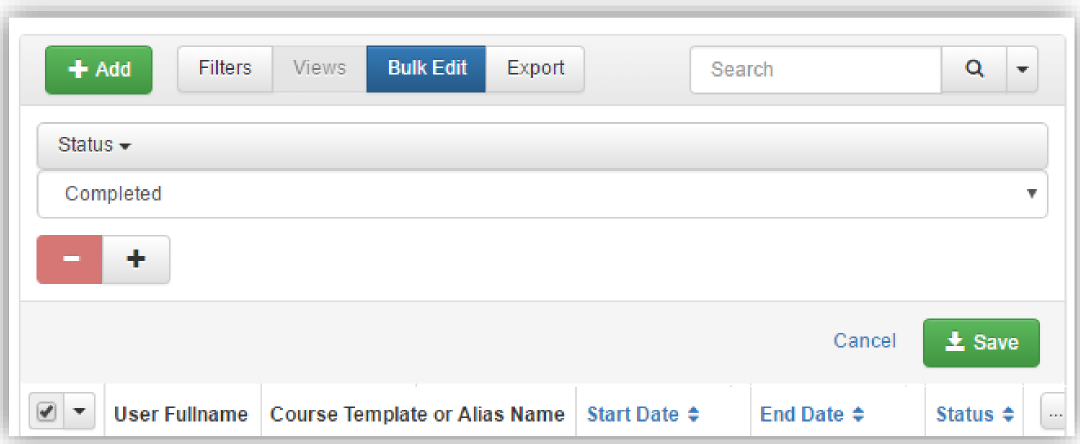


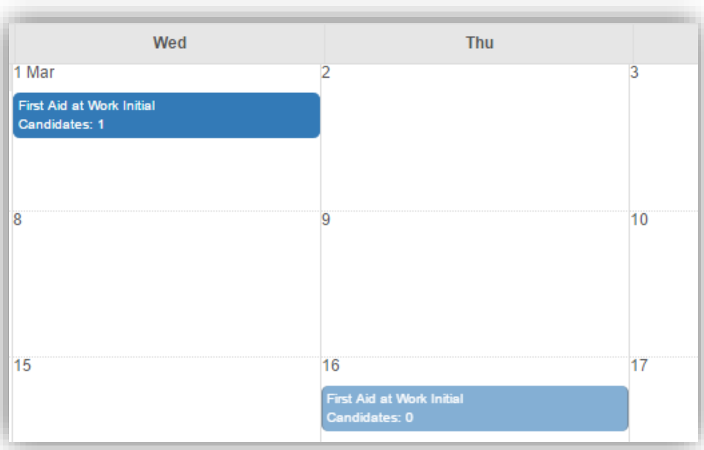
Checking Communications

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



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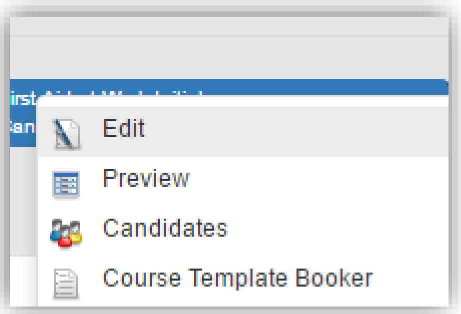
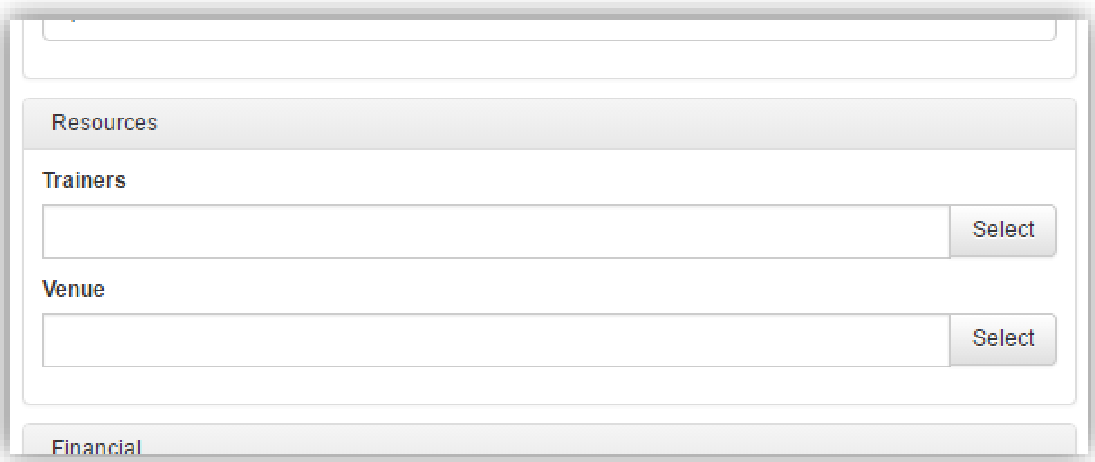
8. Changing a trainer / venue on a course

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

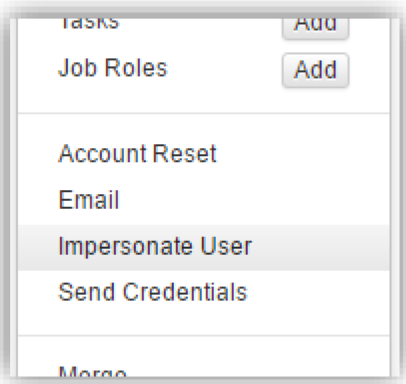


Scroll to the bottom of the page and click Save

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'



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

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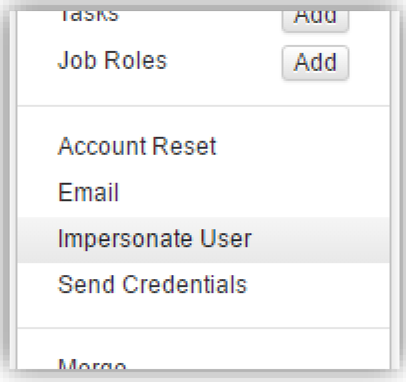
10. Logging in as a manager

Access your system > Open the Users page > search for Manager User

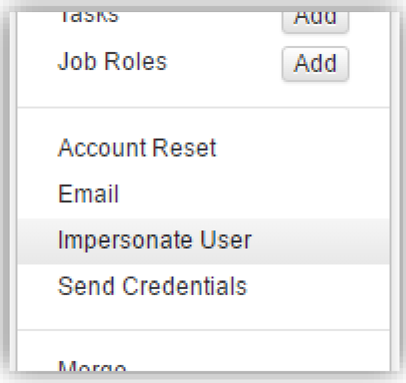
Right click on Manager User and click 'Impersonate User'



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'



<u>Removing Test Data</u>

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

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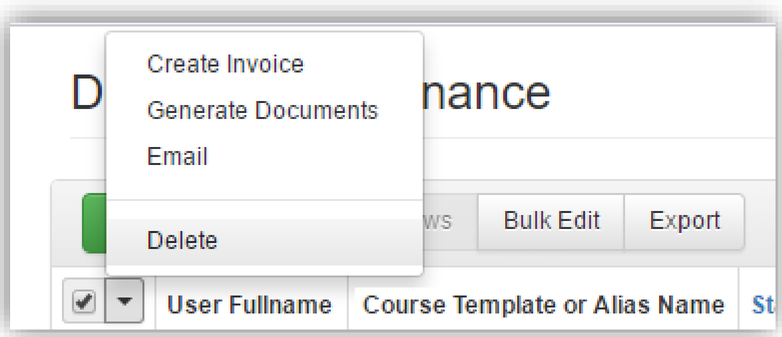
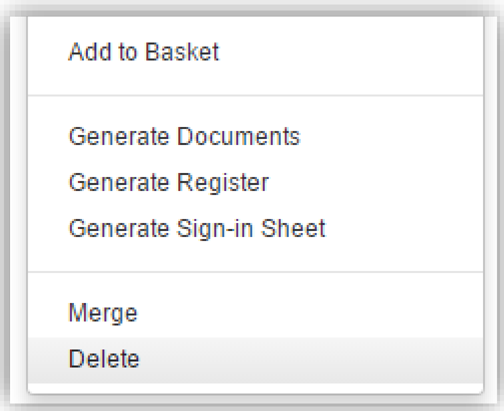


Repeat this for the other scheduled course in the calendar

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

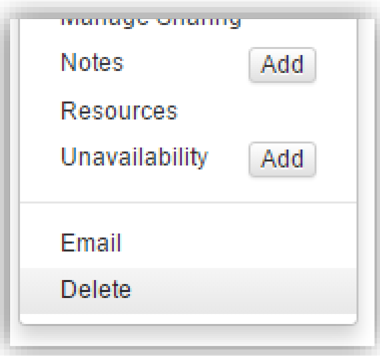


Repeat this for the other scheduled course

Deleting Trainer

Access your system > Resources 'Manage' > search for Test Trainer

Right click on Test Trainer and click 'Delete'



Deleting Users & Account

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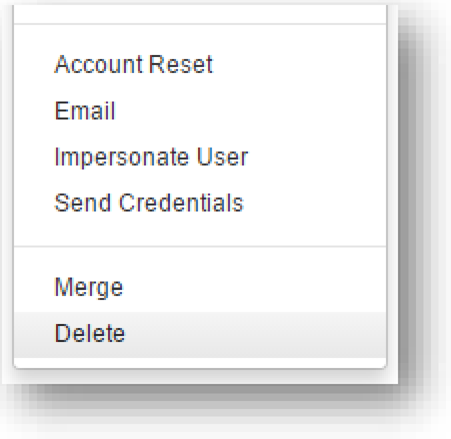
Access your system > Users > search for 'Booked User'

Right click on Booked User and click 'Delete'

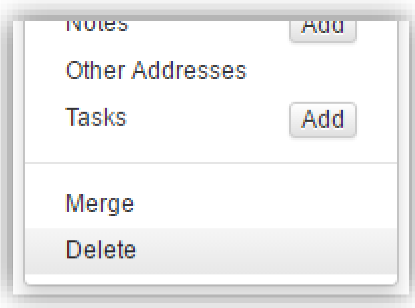


Repeat this for

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

Access your system > Accounts > search for 'Test'

Right click on Test and click 'Delete'



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