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Training & Setup Outline

Typically, the first setup/training session is done with just the people that will be your resident expert(s) and know enough about how you want to set it up to work for everyone. About half of the time is focused on the setup and half on the training, so people that aren't part of the administration can get easily bored with the setup discussions. The order in which things typically happen are:

- setup of drop down lists and organizational settings (return email address from the system, department names,...)
- setup of service request pages
- training on entering employees
- training on entering assets
- training on how to enter service requests and check their status
- training on how to enter work orders and close them out
- training on entering PMs and turning them into work orders
- training on entering documents
- training on running reports
- training on using the PDA
- training on inventory module

We will start by focusing on the setup then we can train based upon your priorities. Usually the service requests and work orders are most important and the other items depend upon your objectives.

We will probably use Zoom for the conference, just like the demonstration. Use the link in the meeting confirmation email you receive.