

The **CapitalVision® Single User Training Package** accompanies the purchase of a single user CapitalVision subscription. It is designed to have the user fully trained in the use of CapitalVision® following a one-week on-site course at the client location. The components of the single user training include:

Discovery and Configuration (Day One)

The SDG Trainer will conduct a CapitalVision® orientation meeting with up to three client representatives (including the single user) to acquaint them with the CapitalVision solution followed by a half day “discovery session” to identify/discuss current capital program processes, pain points, management requirements, define and gather project data and reporting requirements. Following the discovery session, the SDG Trainer will configure and set up the system with the user account and create the initial foundation data.

Basic User Training (Day Two – Day Four)

The SDG Trainer will conduct training on “live” customer data for a mutually agreed upon client project that will be completed loaded and configured by the end of training. This course typically covers two to three days and includes the following topics.

- Projects
- Organizations
- Contracts
- Funding Sources
- Encumbrances and Expenditures
- Pay Requests
- Project Expenses
- Funding Draws
- Assets
- Programs
- Allocations
- Advanced Features
- Reporting

Administrative Training and Wrap-Up (Day Five)

Immediately following the Basic User Training, the SDG Trainer will conduct a half day Administrative Training session to include configuration options and additional advanced features. Covered topics include:

- Lists of Values
- Date, Expense, and Budget Types
- Setting up Templates
- General Ledger Formats
- General Ledger Validation
- Setting System Configuration Options

Following the Administrative Training, the SDG Trainer will spend an additional half day on-site to answer any remaining questions and review the standard business process diagrams that incorporate all CapitalVision® and capital program business tasks and provide a set of standard business diagrams to the client.

CapitalVision® Support Procedures

During the week following training, the SDG Trainer will conduct a web based (off site) workshop to review the standard support procedures include overview of the support information and processes, as well as, instructions on how to login to the support website.