

The *CapitalVision® Basic User Training Package* is available to coincide with the purchase of a five user CapitalVision subscription. It is designed to have five users fully trained in the use of CapitalVision® and includes two onsite visits by a professional SDG Trainer. The components of the training include:

### Basic Training Package

#### **Orientation and Discovery (Week One - On-Site)**

The SDG Trainer will conduct a half-day CapitalVision® orientation meeting with up to ten client representatives (including the five users) to acquaint them with the CapitalVision solution. Immediately following the Orientation Meeting, the SDG Trainer will conduct a series of “discovery sessions” over a one and half day period to identify/discuss current capital program processes, pain points, management requirements, define and gather project data and reporting requirements. Additionally during this time period, the SDG Trainer and the client will select five mutually acceptable projects to be loaded into the system during training.

#### **System Configuration (Week Two - Off-Site)**

Following the Discovery Sessions, the SDG Trainer will compile all of the information needed to configure the system. During this week, the CapitalVision® system will be setup and configured with users accounts and initial system information needed for the unique customer environment.

#### **Basic User Training (Week Three - Day One – Day Three - On-Site)**

The SDG Trainer will conduct training on “live” customer data for the five projects 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 (Week Three - Day Four)**

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

#### **Standard Business Processes (Week Three – Day Five)**

The SDG Trainer will conduct a half day workshop with the five end users to review standard business process diagrams that incorporate the CapitalVision system and the capital program management responsibilities. These process maps will be provided to the client.

#### **CapitalVision® Support Procedures (Week Three – Day Five)**

During the last half day on site, the SDG Trainer will conduct a 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.