Typical implementation steps and timeframe for the implementation of the InItMedia Training Delivery Management System

To implement the InItMedia Training Delivery Management System there are several specific steps that need to be completed. These steps generally need to be completed in a specific order.

1. **Building the database of training courses.** This needs to be completed first as it is the based for scheduling the courses as well as creating historic information about who has attended courses. To build the database of training course there is an admin logon function that takes you to add/ edit courses. This normally takes companies 2 to 6 weeks for the information to be entered and reviewed. This is very dependent on the number of course and the available time to do the data entry. You can generate a course catalogue from the information you have entered to see a summary of the program and help review the details.

   The fields of information about and/ or can be entered for a course are
   - Course system ID – This is system generated
   - Course code – this is a manually entered code (if used)
   - Course short title – 20 characters
   - Course long title – 255 characters
   - Course description
   - Course content
   - Course learning outcomes
   - Is this a module of another course Yes/ No
   - If yes, what is the Course Code (drop down list)
   - Course group 1 – e.g. type, class, brand, etc
   - Course group 2 – e.g. sub group within type, class, brand, etc
   - Course level – Beginners, advanced, etc
   - Course duration
   - Has pre-requisites Yes/ No
   - If yes what are the pre-requisites?
   - Standard price
   - Group discount price
   - Coupon discount price
   - Calendar colour – This is the colour that is display on the calendar for the course. This is used to help create recognition of course type or levels.
   - Brochure PDF
   - Detail information document PDF
   - Workbook PDF
   - Trainer document PDF
   - Feedback PDF
   - Certificate PDF template
   - Name tag PDF template
   - Place card PDF template
   - HTML information page
   - Can access page after course for a nominated period of time (e.g. to download extra documents, information, etc.) Yes/ no
   - If yes for access page after course, duration of access
   - If yes for access after course, location of page
   - Is this an online course Yes/ No
   - Is there a quiz or assessment for the course Yes/ No
   - Is yes, what is the quiz or assessment name?
   - Course frequency – how often would you expect to schedule the course
   - Hidden comment – Comments that are on visible to the admin user
   - Current tick box. If set to true course is displayed in catalogue, and scheduling.
   - Last edit by – name of person that last made changes
   - Last edit date time – The date and time when the last edits were made.

2. **Building the Document register.** This needs to be completed as the courses details are being added to the system. The document register contain the details and online location of brochure, flyers, training course material, etc that are referenced in the training course.

3. **Building the Training Assets register.** This needs to be completed before the scheduling can be prepared. This is a list of the primary training assets such as a training room, or specific equipment. If a training room then a map and other how to get there information is included in the data and used when a course is scheduled.

4. **Building the Admin/ trainers User list.** This needs to be completed before the scheduling can be prepared. This is a list of the users of the system that are admin personnel and trainers. The user rights settings determine what the user can do. This ranges from total system control to only be able to see the courses that a specific trainer is scheduled to deliver.

5. **Other Admin systems.** There are a number of other administrate systems that need to have suitable data added to allow the total system to function. These include the list of non-training days and public holidays for the year. This information is used by the scheduling system. Company setting data which manages information such as email address, SMS data, company name, address, logos, templates, etc.

6. **Scheduling the courses.** The courses once built can be scheduled. The scheduling process places the courses on the calendar (calendar view and list view). Depending on the number of courses to schedule this may take 1 to 4 weeks to prepare. Once courses have been scheduled, the course calendar (calendar view and list view) becomes populated.

   The fields of information about and/ or can be entered for scheduling are:
   - Schedule system ID – This is system generated
   - Course short title – this is selected by a drop down list of courses. If the course is currently on an active schedule. You will be prompted about the fact it is already scheduled. Once selected the long title, code and system ID are also displayed.
   - Date course last held - this is automatically found from system records and is display only.
   - Scheduled date. This is the planned date for the course.
   - Scheduled start time
   - Scheduled finished time
   - Auto reschedule – Yes/No. If yes then multiple courses will be scheduled
   - If auto reschedule is yes, this is the number of days to reschedule copied from the course database. This value can be edited for this scheduling event.
   - Number of reschedules. This is the number of times to schedule the course.
   - If auto schedule is yes, this is the day value tick boxes that the course can be held, e.g. Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. If only Thursday is selected then the auto scheduler will find the next available Thursday where the nominated trainer and nominated training room is available (including not a public holiday) after the nominated number of days to reschedule.
   - Exclude public holidays and other No training today nominated dates. This stops courses being nominated for these dates.
   - Nominated training room. This is a drop down list from the training assets.
   - Nominated number of attendees. This is automatically copied from the selection of the training room, but can be edited.
   - Special equipment required. This is a drop down list from the training assets.
   - Nominated trainer. This is a drop down list from the admin users/ trainers.
   - Hidden comment – Comments that are visible to the admin user
   - Current – tick box. If set to true course scheduling is displayed in calendar.
   - Last edit by – name of person that last made changes
   - Last edit date time – The date and time when the last edits were made.

7. **Course Date System.** The course date system is the record of the courses that are planned as well as those that have been completed. The data is created for the course scheduling process running. The course date system data fields include the following:

   - Course date ID – This is system generated
   - Course short title as well as displaying the long title, code and system ID are also displayed.
   - Scheduled date. This is the planned date for the course.
   - Scheduled start time
   - Scheduled finished time
   - Nominated training room. This is a drop down list from the training assets.
   - Nominated number of attendees.
   - Special equipment required. This is a drop down list from the training assets.
   - Nominated trainer. This is a drop down list from the admin users/ trainers.

- Number of attendees booked for course. This is updated as each new booking occurs. Once the number of people booked matches the Nominated number of attendees the flag in the calendar system shows the course is full.
- Last edit by – name of person that last made changes this includes when someone books on a course.
- Last edit date time – The date and time when the last edits were made. This includes when someone books on a course.
- Course cancelled – Yes / No. This is set by the Admin user, if the course is to be cancelled. If a course is cancelled it is automatically removed from the calendar.
- Course completed – Yes/ No – this is automatic once the date for the course has occurred with no course cancelled flag set to yes.

8. **Adding existing course attendees** is an important function as it allows the emailing of newsletters and other booking functions to operate correctly. When someone registers on a course they are added to the booking database. The system is broken down into 3 sections:
   a. Companies. People are linked to companies
   b. People to do the bookings (e.g. a training officer in a company)
   c. People who are the attendees of a course.

   From this 3 section arrangement there is the ability to group booking together to create single invoice for a company for a group of courses as well as the group discount process.

   At an admin user level the people and company databases can be edited to add historic people and company as well as maintain the data.

   One of the functions of the people database is the unsubscribe flags that is maintained for the users.

9. **Booking system.** The booking system is made operational after all other systems have been configured, data entered and checked. A user can go back to their booking at any time by use of the booking Reference ID. There is a tax invoice generated through the booking system as well as the booking attendance details sent to the attendees. The booking system comprises two sections; bookings and booking details. The data that exists in the booking system includes the following:
   a. Booking systems
      - Booking Reference ID – this is a system generated value and is unique for each booking
      - Booking date and time – this is system generated when the order is commenced
      - Booking company – this is the company details of the company that made the booking. This can be automatically completed by entering the email address used for previous bookings. If the booking is by an individual this does not need to be completed.
        - Company name
        - Department or division
        - Company address line 1
        - Company address line 2
        - City/ town/ suburb
        - Post code
        - State –Automatic from post code
        - Country – default is Australia
        - Phone
        - Fax
        - Email
        - Company purchase order
        - Nominated contact
      - Booking person – this is an individual that is making the booking. This can be automatically completed by entering the email address of the individual that has booked previously.
        - First name
        - Last name
        - Title
        - Email address
        - Phone - Default is company
        - Fax – Default is company
        - mobile
      - Comment field
      - Selected payment method
      - Credit card details (coded and encrypted) (card type, name on card, expiry date, card numbers, SVC)

- Group Coupon or Voucher code
- Total before any discounts amount
- Discount amount
- Total payment
- Payment date (this is automatic if Credit card but manual if Direct deposit it is put in by the Admin user)
- Hidden comment field only visible by admin user
- Wish to receive newsletters and other promotional information – tick box default is true
- Last edit by – name of person that last made changes
- Last edit date time – The date and time when the last edits were made.

b. Booking details system

- Booking detail reference ID – this is a system generated number for each booking detail section e.g. each course added to the order.
- Booking Reference ID – this is a system generated value and is unique for each booking
- Booking details date and time – this is system generated when the order is commenced
- Course date ID with Course short title – the course is selected as a result of click through the calendar or by use of a drop down list of courses. Once selected the long title, code and system ID are also displayed.
- Name of the attendee if different from person that makes the booking. This is used for when different people are attending then did the booking. This can be automatically completed by entering the email address of the individual that has booked previously. The details for this include:
    - First name
    - Last name
    - Title
    - Email address
    - Phone - Default is company
    - Fax – Default is company
    - mobile
- Course coupon or voucher code
- Course amount
- Discount if any
- Amount after discount

10. **Newsletter system.** The newsletter system is made operational after all other systems have been operating. There can be a number of newsletter HTML templates stored in the document control system. These templates have data tags that source the data from the people databases as well as the course date database. The newsletters can be prepared and then automatically sent to the distribution lists based on filters by all, or historic course attendance. E.g. Sending newsletters to all those that have completed the beginner course but not the advanced course over the last six months. Each time a newsletter is created a record is maintained in the database. Each time a newsletter is sent a record of the email address it was sent to is maintained.

11. **System reporting.** There is a reporting function that is able to create a range of reports as well as data exporting functions. The exporting functions allow you to export by data filters your data as XLS files.

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