

GOING LIVE & TRAINING



Background

In Secondary Schools, 2 representatives will attend the site for the first 3 days when the system is "Going Live". All training is done on site at the location of the relevant unit (Revaluation Unit, POS terminal and Back Office).

The trainer demonstrates a process and then invites the operators to try it themselves and to ask any questions they may have. There is sufficient time allocated to allow repeated transactions to ensure competence and confidence.

Training is supported by: a comprehensive and easy to use operators' manual; one page laminates summarising some of the regular functions; and a training checklist.

Given that there will be 2 representatives from CRB Solutions on site for 3 days (providing hands-on live cover for the launch) there can be a degree of flexibility in the time allocated to specific tasks and to the scheduling of those tasks.

Day 1

The Revaluation Units are activated for uploading cash. Operation of the units is very simple and requires no more than a few minutes training. Nominated students and staff members are trained in the use of the Revaluation Units so that they can supervise the initial wave of live usage.

The customer should nominate 2 or 3 members of the catering staff (typically the catering manager and 1 or 2 others) who will be trained in the operation of the Back Office Suite. In addition to extensive training, these trainees will be given supporting documents and shown how to use the help files within the system.

Training for the Back Office Suite is the heaviest training requirement and will be spread over the three days. It is essential that the relevant catering staff are able to allocate a suitable amount of time to this process.

On day 1, about 2 hours should be allocated to this process so that the essentials of the Back Office Suite can be covered. This will include: starting up the POS terminals and Revaluation Units; issuing a card; adding value to an account (cash or cheque); issuing a temporary card; amending free school meal allowance records; the dayend procedures; checking and amending users' account details; calling up and printing off some sample reports.



Conducting this training in a live situation, with real data, not only ensures that the database is completely up to date, but also lends the training process a more realistic and memorable quality. If there is a need for an administrative operator to be able to access the system at a different location for a specific purpose (e.g. in the administration offices to amend free meal eligibility) then this training will occur at that operator's work station and will cover the required functions.

It is essential that the POS operators should be available for collective training at the POS locations for half an hour on day 1. Our representatives will supervise mealtime services throughout days 2 and 3 to assist with any matters arising in live operations.

Day 2

On day 2 there is a full operation. The Revaluation Units are operating, the Back Office drives the system, there is a full operation at POS, and the normal daily routines must be run.

Training for the Back Office Suite continues in the same way as described above and explores the system in greater detail. This typically takes around 4 hours.

Our representatives supervise the meal time service.

Day 3

Day 3 is a second full run through during which any outstanding issues are picked up. At this stage it can be expected that such issues will few and minor.

Back Office training continues and takes around 6 hours.

Primary Schools

Training in Primary Schools follows a similar pattern to that for Secondary Schools.

However, since numbers are much lower and the set up and operation of the system tends to be much less complex, we schedule for one trainer to be on site for 2 days. This can be extended where exceptional circumstances dictate.

Support

Once the "Going Live" process has been completed, and the trainers have left the site, you will want to be sure of comprehensive and immediate support. For further details see our brochure on "After Sales Support."

For further information, visit www.crbsolutions.co.uk or contact our head office on 0131 440 6100.

