Training Services Brochure

May 2019

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Training by ACT

At ACT we have a very simple training mission statement:

'To deliver quality training to our customers to enable them to use our products effectively'.

We want to work with you from the very start of a project with us to ensure you get the most out of our expertise, and also our products.

Our trainers will provide top level training on our products ensuring you understand not only what you have bought, but also what the products can do in the longer term.

The Training Team at ACT can provide training on all our products. You choose whether you would like training using our generic training environment, or tailored to your environment and scheme.

Training can be held either at our offices in Chippenham, Manchester or Cardiff, or at a location of your choice with group numbers kept small, preferably less than eight. For remote workers or times when only a quick refresher is needed, we can deliver training via web conference using Cisco's Webex system.

The choices we provide ensure you can get the right training at the right time. We want new users to get the best from our systems from the outset, and want to keep existing users up to date with product developments. We want you to be well versed in all that the products can do for you, not just what was implemented at the start of a project.

Our ethos

The ACT Training Team believe that 'learning is in the doing' so we will always ensure delegates get maximum exposure to practice new skills within the training session. Our aim is to ensure our delegates have been exposed to and tried new skills for themselves before they leave the training room, so that when they return to their day to day environment they are ready to put their new skills into action.

Standard or tailored

At ACT we like to give you options and within the Training Team we like to put you in the driver's seat.

All our product training can be delivered either using our standard training environments, or tailored to your scheme and setup.

Standard training will cover all the features and functionality of the system (within the confines of the course objectives) and ensure delegates have a clear understanding of what the systems are capable of. This type of training is good for delegates who are defining business processes, perhaps before the systems are fully configured, or for those who have been using the system some time and require a refresher.

Our tailored training is designed for users joining an existing scheme, or who want to have full in-depth knowledge of their system setup. Our trainers take the time to understand your scheme and its environment and how you use the software provided by ACT. We tailor the training materials to show your systems and plan the sessions to meet your specific needs.

Education Programmes

Many of our clients who are new to our systems require a number of training sessions to get up to speed with our full product set. Our Education Programmes are a way to buy the full range of training sessions for a single fixed amount, with the ability to schedule the training when it suits you.

The Education Programmes provide a solid foundation to the systems, with the ability to purchase any additional training as necessary. For more information on the Education Programmes, see the end of this brochure.

Courses available

What follows is a description of our standard courses; please see this as a guide to what is available rather than a fixed list. Should you have specific requirements, call or email us and we will be happy to discuss what you need and recommend a plan of action.

Contact your Account Manager, Project Manager or Service Delivery Manager, or contact us on 01249 751200.

Smart Ticketing, ITSO and the ACT world

This session will give you an overview of the Smart Ticketing industry, who ITSO are and what they do, and how ACT works within the ITSO world. The course is designed for anyone new to the Smart Ticketing transport industry or anyone looking to review their knowledge and ensure they have a solid foundation.

Course objectives:

By the end of this session you will be able to:

- Explain what Smart Ticketing is and its benefits
- Explain who ITSO are and their aim
- Explain the goal of the ITSO specification
- Understand how ACT works with ITSO
- Understand the role of some of ACT's products within an ITSO environment
- Define some key terms used within the ITSO world such as ISAM, ISRN, POST and explain what Part 11 is.

Recommended preparation time for a tailored course:

Not available as a tailored course

Duration:

Half day

Pre-requisites:

None

Further learning:

We would recommend this as the precursor to the HOPS Essentials or Hotlisting and actionlisting explained course.

Host or Operator Processing System (HOPS) Essentials

This course is designed for anyone who wishes to know what the HOPS is, how it works and how to use some of the core functionality. This includes viewing details of the Customer Media (smart cards) in the scheme, the products live in the field and reports of activity within the scheme.

Course objectives:

By the end of this session you will be able to:

- Log into, navigate and access support for the HOPS
- Understand the structure and format of an ITSO application message
- Refer to a range of message codes and their meaning
- Search application message and data frames by message class, transaction code or sealer ID
- Use HOPS reports to view ISAM or ISRN transaction messages
- Search for Customer Media and find out information associated with them, e.g. products on the card, status of card
- Use the reports available to find out information about the scheme
- View hotlist and actionlist items to be distributed by the HOPS.

Recommended preparation time for a tailored course:

Minimum one day

Duration:

Half day

Pre-requisites:

None

Further learning:

Hotlisting and actionlisting explained

Any other product courses as appropriate

Hotlisting and actionlisting explained

This course is for anyone who needs to know more about how hotlisting and actionlisting works in practice and the options available for setup. This course is useful for anyone who works with a scheme which already has hotlisting and actionlisting configured, and also for those who are considering implementing hotlisting and actionlisting and need to know what options are available.

Course objectives:

By the end of this session you will be able to:

- Explain the process of hotlisting
- Explain the reasons for hotlisting
- Hotlist a product or a card via the CMS or HOPS
- Understand the options available in hotlisting
- Explain what actionlisting is and how it works
- Explain how items get added to and distributed from the actionlist
- Remove an item from an actionlist
- Understand the options available in actionlisting.

Recommended preparation time for a tailored course:

Minimum one day

Duration:

Half day

Pre-requisites:

Would recommend attending either Smart ticketing, ITSO and the ACT world or HOPS Essentials prior to this course.

Further learning:

Any of the other product courses as appropriate

Customer Management System (CMS) Essentials

This CMS Essentials course is designed for anyone who is a new user or requires familiarity with the CMS. The course covers the core functionality of the system including how to search, edit and create customer records, issue cards and generate reports. This course is appropriate for any new user of the CMS who will be required to use these functions, but also those who will be defining business processes or supporting users.

In courses using our generic training environment, you can see both concessionary and commercial models, and the differences between them. In our generic courses the trainer will focus on ensuring you understand what is possible with the system so you can make informed decisions on how the CMS can be configured.

Course objectives:

By the end of this session you will be able to:

- Log into, navigate and access support for the CMS
- Explain how the CMS fits into the ACT world
- Search for and edit customer records
- Add new customer records to the system and issue Customer Media (smart cards)
- Hotlist and reissue Customer Media
- Manage documents sent to/received from the customer
- Create and edit the contact history for a customer
- Manage reminders and tasks set within the system
- View transactions generated by the customer using their Customer Media
- Generate reports on customer data held in the CMS.

Recommended preparation time for a tailored course:

Minimum two days

Duration day

One day

Pre-requisites:

None

Further learning:

CMS Advanced modules

Customer Management System (CMS) and Portal interaction

This course is useful for anyone involved in the introduction of a concessionary or commercial portal, and explains how the portal works and how it interacts with the CMS. The session will look at how customers will interact with the portal, and how actions in the portal are viewed as changes in the CMS.

Course objectives:

By the end of this session you will be able to:

- Navigate the customer portal and explain the steps required for new/renewal/lost cards
- Use the CMS to view customer activity within the portal
- Use the CMS to authorise customer photos to trigger card print instructions
- Reinstate customer access to the portal when they have locked their portal account
- Identify customers who have failed identity checks in the portal, and resolve the issue in the CMS before issuing a print instruction.
- Access the ACT ServiceDesk for support with the Portal or CMS.

Recommended preparation time for a tailored course:

Minimum one day

Duration:

Half day

Pre-requisites:

This course is most suited to existing CMS users. It should be combined with CMS Essentials Training for those who are new to both systems.

Further learning:

CMS Essentials

CMS Advanced Modules

A series of half day CMS Advanced modules have been produced to allow you to pick and choose modules that will be of benefit to you in your scheme.

Modules can either be purchased as stand-alone half day courses or be combined together with other half day courses to create a full day course.

Batch card issuance, management and renewal

This course covers the setup and usage of batch printing in the CMS. This useful tool enables the collation of print requests into batches for printing at specified dates/times. This module also covers the use of renewal logic to automatically identify and reissue cards which are due to expire.

Course objectives:

By the end of this session you will be able to:

- Create, view, edit and delete batches
- Issue new cards using a batch
- Renew existing cards using a batch
- Remove card(s) from a batch
- Select cards from a batch to be printed individually

Recommended preparation time for a tailored course:

Minimum half a day

Duration day

Half day

Pre-requisites:

CMS Essentials

Further learning:
Any of the other CMS Advanced modules as appropriate

Anonymous card issuance and management

This course explains the role of anonymous cards in a transport ticketing scheme and how the CMS can be used to enable the printing of such cards and their registration and management.

Course objectives:

By the end of this session you will be able to:

- Create a template for the issuance of anonymous cards
- Search for, view, edit and copy anonymous card templates
- Set up a batch of anonymous cards for printing
- Search for, view, edit and copy batches
- Search for and view an active anonymous card
- Use two different methods to assign an anonymous card to a customer record.

Recommended preparation time for a tailored course:

Minimum half a day

Duration day

Half day

Pre-requisites:

CMS Essentials

Further learning:

Any of the other CMS Advanced modules as appropriate

User account administration

Designed for all local administrators, this course covers the management of user accounts, including creating and suspending accounts as necessary.

Course objectives:

By the end of this session you will be able to:

- Create user roles and manage access rights allocated to user roles
- Add new user accounts to the CMS
- Reset passwords and validate user accounts
- Disable and re-enable user accounts
- Manage print location mapping for user accounts

Recommended preparation time for a tailored course:

Minimum half a day

Duration day

Half day

Pre-requisites:

CMS Essentials

Further learning:

Any of the other CMS Advanced modules as appropriate

CMS Administration

Covering system administration tasks such as Template management, Task management and Reminder configuration and dealing with Deleted customers, this course is aimed at any CMS users performing an administrator role and managing the use of the system within their business.

Course objectives:

By the end of this session you will be able to:

- Create document templates and upload them into the CMS
- Create and manage system tasks to be distributed within a team
- Delete customer records and access deleted information as required.

Recommended preparation time for a tailored course:

Minimum half a day

Duration day

Half day

Pre-requisites:

CMS Essentials

Further learning:

Any of the other CMS Advanced modules as appropriate

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Two programmes are available as standard, however feel free to contact us to discuss other options.

Smart Ticketing fundamentals

Tailored delivery for up to 8 delegates of Smart Ticketing, ITSO and the ACT world, HOPS Essentials, and CMS Essentials. Included in the cost are three days preparation.

Retail Smart Ticketing

Tailored delivery for up to 8 delegates of Smart Ticketing ITSO and the ACT world, HOPS Essentials, CMS Essentials, plus CMS and Portal Interaction. Included in the cost is six days preparation.

Please note that expenses incurred when training is delivered at a client site will be recharged to the client.

Contact us

To discuss requirements, contact your Account Manager, Project Manager or Service Delivery Manager, or call us on 01249 751200.