accessplanit – training management software

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Service Definition

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Overview

accessplanit is a software house with an extremely powerful system, developed and supported by an enthusiastic and dedicated team. We understand the system inside out and would love to share with you the infinite ways you can use its functionality to streamline and automate every training administration process, then use your analytics to constantly improve what you do.

Product Summary

Course Management and Scheduling - Manage a variety of course types such as classroom, eLearning and sessional.

Resource Management - Manage both internal and external training resources including trainers, venues and equipment and avoid double booking of resources through conflict management.

Communication - Set up pre-defined communications such as course reminders, feedback forms and joining instructions.

Workflow Engine - A powerful workflow engine automates actions including communication, status changes and updates using rules and triggers.

Tasks and Reminders - Assign tasks to yourself or another user and set reminders in the form of pop ups or emails.

Certification and Awards - Create and assign different award types such as Certificate, Diploma, Unit and Competence.

Document Generator - Generate documents including certificates, registers and sign in sheets (Microsoft Word integration).

Dashboard - Add gadgets to allow you to see the area's most applicable to you at a glance.

Reporting - Report on areas such as the organisation, individuals and courses and export in a variety of formats.

Custom Forms and Evaluation - Create customised branded feedback forms and surveys which can be scheduled to be automatically sent out at a specific time or with the change of candidate status.

Online Booking - Process bookings 365 x 24 x 7 through your website with shopping basket integration that supports multi course registration, group bookings, discounts and voucher codes.

Finance, Invoice and eCommerce - Automatically generate and send invoices, reminders and statements. Manage cash flow, track payments, issue refunds and credit notes.

eLearning - Supports SCORM 1.2/2004 compliant content.

Learner Portal - Cloud based**,** mobile responsive, HTML 5 compliant learner portal.

Email Marketing - Design and send personalised marketing campaigns using system data or imported mailing lists**.**

CRM/Enquiry Management - Capture all incoming enquiries and opportunities and link to customers, sales staff, courses or course dates.

Multilingual - The system supports over 40 languages.

Service Summary

- **Process Mapping** - Prior to sign up we will map your processes and align them to system functionality.
- **Project Management -** As part of our Driving Success Programme*, throughout implementation you will have a dedicated Project Manager to support you along your journey from planning and building your system through to launch.
- **System Training** – You are provided with onsite and/or webinar training to ensure that system usage is successful.
- **A Dedicated Customer Success Manager –** As part of our Driving Success Programme*, once you have launched your system, you will be handed over to a dedicated Customer Success Manager who will help you to maximise and optimise your use of the system.
- **Support Helpdesk** – The Support Helpdesk is available during working hours (9am-5pm GMT) via telephone or email and operate a Ticketing system. Tickets are categorised and service is provided in line with Service Level Agreements (SLAs) as outlined below:

Category	Description	Target Resolution Time
1	This type of problem is classified as urgent and will be dealt with immediately by the development team.	Problem to be resolved within 4 Normal Business Hours of notification by the Customer.
2	This type of problem is usually resolved by a 'Hotfix' which means that it does not wait for the next maintenance update.	Problem to be resolved within 2 Business Days of notification by the Customer.
3	This type of problem is resolved by a fix within the natural two weekly maintenance build cycle. This will be dealt with by the development team.	Supplier to resolve problem when the Supplier issues its next maintenance update.
4	This type of problem is always dealt with by the Helpdesk Team and is classified as a Green ticket.	Response in 5 days. Resolution time will be detailed in the analysis of the enquiry.

- **Online Support Portal** – The Support Portal is available 24/7 to log any issues and addressed by a Support Helpdesk advisor in line with the Service Level Agreements (SLAs) outlined above.
- **Self Help Guide –** An online help guide with step-by-step processes and video tutorials to provide system guidance.
- **Bespoke Development –** There is an option to request bespoke change requests to the system to enhance individual functionality.
- **Working to ISO 9001:2015** - Operating to a Quality Management System to ensure standardised processes and levels of quality throughout the organisation.
- **Working to ISO 27001:2013** – Information security is a key priority throughout the organisation.
- **Customer Service Excellence Standard –** Providing customer service in compliance with Customer Service Excellence standards.

* See Appendix 1 for our Driving Success Programme.

Technical Summary

- **Information Security –** accessplanit is accredited to ISO 27001.
- **A Secure Hosted Solution** – Systems hosted by Redstation who has data centres based in the UK and are part the iomart group who hold ISO 27001 accreditation. There is also an option to self-host if preferred.
- **Ongoing System Updates** – You are provided with 2 weekly system updates.
- **Domain Name Registration** – We will register a suitable URL for your system.
- **Storage Capacity** – All systems come with their own storage area for documents and files.
- **System Uptime –** A history of 99.99% uptime.
- **Website Integration –** This can be completed either by API or via a simple plugin tool.
- **Microsoft Exchange Integration** - This integration is for synchronising Outlook calendars for trainers and/or training venues via Microsoft Exchange.
- **Accounts Integration** – For users of Sage and Xero we integrate via a piece of middleware named Zynk in order to prevent re-keying of invoices, credit notes and transactions.
- **Payment Gateway Integration** – We integrate with a variety of Payment Gateways including SagePay, PayPal, Barclays EPDQ and Realex.

Disaster Recovery

Should a worst case scenario occur we have server monitoring tools which would inform our technical team (regardless of time of day).

This would then be picked up as an urgent fix for immediate investigation.

Should the problem be with our hosting partner we are able to use other hosting companies we have agreements with (for this reason) to restore the last backup of your system and this can be done within a matter of hours.

The furthest back we would have to restore your backup from is from 24 hours previously.

We offer added peace of mind by offering an optional tool which allows authorised super users to be able to create their own system backups at any time through an option in the software.

What Our Customers Say

We love developing professional relationships with our clients. Here's what they say:

"accessplanit has enabled us to reduce administration by 50% and increase our profits year on year" **University of the Arts**

"One of the reasons we chose accessplanit is because we knew we would get great service and that was extremely important to us." **Citizens Advice Service**

"I make no secret of the fact that I think accessplanit have the perfect system for this Trust, one that has a stable and reliable core built around compliance, a nationally mandated necessity." **Royal Brompton & Harefield NHS Trust**

Appendix 1 - Our Driving Success Programme

Get it right first time. Working with you to:-

- Understanding your current processes
- Identify your current pains
- Identify areas where efficiencies can be made
- Define and prioritise your goals
- Identify key aspects of your processes and map the process flow
- Define fields associated with your processes
- Prepare to import data
- Decide which reports you need

Meeting your goals and building the right system for your business by:-

- Creating you a test and live system
- Building and developing any bespoke requirements
- Setting up your system
- Training your team
- Undertaking user acceptance testing (UAT)

Trained and confident you're ready to go:-

- Your system receives full sign off
- Your fully configured system is moved into a live environment
- Your team is introduced to the customer support portal which includes a knowledgebase and ticketing system
- You are given a 'Launch' priority support period with our technical telephone helpdesk

But this is only the start of your journey with us, support continues with:-

- A dedicated Customer Success Manager
- Workflow mapping
- A personalised Customer Success roadmap
- Support beyond implementation

You become a fully fledged member of the accessplanit community!

- Our Driving Success newsletter keeps you up to date
- Regular best practice guides help you make the most of the system
- You are invited to monthly webinars covering a variety of topics
- Attend our annual customer forum
- Take part in free customer training events