

# GRAPHICAL DATA

## RESOLVE Training Syllabus

### Introduction

- Overview of Resolve and its purpose (this will be both generic and contextual to the client's build)
- High level view of the capability of the system (general functionality)
- Glossary of Terms to set context for what we will discuss - tickets, dashboard, modules etc possibly with examples to illustrate each (a ppt with visual/diagram aids would be a benefit)
- Browsers.

### User Interface

- Introduction to a Resolve system environment (homepage and left hand nav)
- Review main navigation (left hand nav) options, indicating that they can be dependent upon the Resolve system and the user's specific role / permissions
- Indicate which nav items are common to all Resolve systems and then indicate the client specific items
- Different ticket types (risk, issue etc.). These may be permission based, who to contact if permission is required
- Navigating the Dashboard view
- Using the column interface, including explanation / demonstration of horizontal / vertical scrolling, re-sizing of columns etc.
- Using the column specific options menus
- Permission based and may only be visible to certain users in certain tickets

## User Admin

- User accounts
- How they are issued
- Logging in/out & password resets.
- Super User training – managing user accounts, user profiles, permissions and groups

## Standard Functionality

- Reporting (If applicable) - how to run standard and custom reports, what the results look like, exporting results of reports etc
- History - explain how history module works with relation to tickets (how to access, when it is updated etc.)
- Comments - show commenting features, how to add comments and how to see other user comments
- Attachments – how to add attachments when creating tickets, how to add attachments through comments
- Preferences section – account information, ticket preferences, personal vs user groups

## Data Management

- Demonstrate difference between view and edit modes for a ticket, how to access these areas
- How to create a new ticket or edit an existing one (permission may depend on user groups etc)
- Different types of fields and form validation
- Batch editing of data
- Automated updates of data, including import functions (client specific)
- Demonstrate any data feeds into the Resolve system, when these happen and their impact

## Workflow / Governance Rules (if applicable)

- Demonstrate any workflow rules applied to the system
- which ticket types they relate to
- show the workflow diagram
- run through a typical scenario
- email notifications associated with workflow triggers

## Data Querying

- Using the global search to display results, saving searches
- Working with filters, saving filters and managing saved searches
- Dashboard view and how this is customised with saved searches etc

## Custom Modules

- Ticket and Function specific training related to the actual Resolve build (If applicable)

## Advanced Functions

- Exporting and Importing Data
- Different UI (client specific)

## Support

- How to report an issue with Resolve
- Online help availability
- Client specific support - key contacts, client help desks etc

## Super User (if applicable)

- Super user account administrative controls (if applicable)