



# Compansol

Computer Analysis & Solutions

## BLUMEN On-Site Training Setup Check List

Please verify and check the list of setup requirements for the scheduled Onsite Training. Please complete and fax this document to our office at least one week prior to the date of Onsite Training. Thank you.

### 1. Classroom Setup (Required)

- Individual computers for all participants
- Computer for the trainer connected to a LCD projector
- Blumen Demo should be installed on all computers (PC version only)
- MS Word/MS Excel should be installed on all computers
- Internet connection should be available on all computers
- A printer driver should be installed on all computers
- Users should have administrative rights to the computers
- Disable all applications (like Deep Freeze) that may hinder the training

### 2. Audio / Visual Setup (Recommended)

- Projection Screen should be available
- Writing Board should be available

### 3. Have you received the training workbooks?

Yes

No

### 4. Do you require a custom training agenda?

Yes

No

If Yes, have you faxed the custom training agenda?

Yes

No

### 5. Training Location

- Is there a parking permit required?  
If yes, will you provide one?
- Is there a campus map available?  
If yes, please fax or email the campus map.
- Is the training location the same as your contact address?  
If no, please provide the training location below:

Yes

No

Yes

No

Yes

No

Yes

No

University/College

Phone Number

Customer's Name

Signature



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## BLUMEN On-Site Training Suggested Agenda

Please choose the topics that you want to include in your On-Site Training:

- |   |   |
|---|---|
| <input type="checkbox"/> Navigating around BLUMEN               | <input type="checkbox"/> Mass E mailing   |
| <input type="checkbox"/> Setting System Preferences             | <input type="checkbox"/> Mass Text Messaging**  |
| <input type="checkbox"/> Making a Backup of Data Files*         | <input type="checkbox"/> Blumen Online Lab**  |
| <input type="checkbox"/> Creating New User Accounts             | <input type="checkbox"/> Set My Preferences   |
| <input type="checkbox"/> Browsing Student Data                  | <input type="checkbox"/> Generating the Annual Performance Report (APR)               |
| <input type="checkbox"/> Using the Sidebar                      | <input type="checkbox"/> Running PE Points  |
| <input type="checkbox"/> Adding New Student                     | <input type="checkbox"/> Adding End Status (TS and EOC only)                          |
| <input type="checkbox"/> Adding Contact Logs                    | <input type="checkbox"/> Upgrade to Next Fiscal Year                                  |
| <input type="checkbox"/> Adding Attendances                     | <input type="checkbox"/> Adding Students to a Fiscal Year                             |
| <input type="checkbox"/> Adding Stipends                        | <input type="checkbox"/> Copy APR data from previous year                             |
| <input type="checkbox"/> Class Scheduling                       | <input type="checkbox"/> National Student Clearinghouse Interface for Alumni Tracking |
| <input type="checkbox"/> Copying classes from previous semester | <input type="checkbox"/> Managing Activity / Services List                            |
| <input type="checkbox"/> Running Reports, Labels, Graphs        | <input type="checkbox"/> Managing School / College List                               |
| <input type="checkbox"/> Using Global Filters                   | <input type="checkbox"/> Managing Drop Down Lists                                     |
| <input type="checkbox"/> Adding New Report                      | <input type="checkbox"/> Managing Custom Fields                                       |
| <input type="checkbox"/> Adding New Report Label                | <input type="checkbox"/> Setting User Rights*   |
| <input type="checkbox"/> Understanding Data Dictionary          | <input type="checkbox"/> Setting Roles**  |
| <input type="checkbox"/> Adding New Excel Report                | <input type="checkbox"/> Asset/Inventory Management                                   |
| <input type="checkbox"/> Mail Merge with MS Word                | <input type="checkbox"/> Sending Message to Users                                     |
| <input type="checkbox"/> Adding Personalized Letters            | <input type="checkbox"/> Reading your messages  |
| <input type="checkbox"/> Change Social Security number          | <input type="checkbox"/> Time Clock Manager   |
| <input type="checkbox"/> Quick Change Wizard                    |   |
| <input type="checkbox"/> Quick Edit - Student Data              |   |

\* Blumen (PC version only)

\*\* Blumen Online for Trio (BOT version only)

Additional topics you want to add: \_\_\_\_\_



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## **BLUMEN On-Site Training Cancellation Policy**

Compansol offers instructor-led on-site training classes to all our customers. It is a great way to reduce the learning curve and to enhance productivity and maximize your return on investment. We try our best to finalize on a mutual agreeable date to schedule training. However, sometimes Training is available as the schedule of the training personnel permits. Since, we charge a very minimal fee for the training, a minimum of 30 days advance confirmation is required for cheaper airfares and hotel accommodations. Our affordable training fees gives an opportunity to all Trio customers to call Compansol trained staff to their site and get trained, cutting their cost of traveling and enhancing time management. Our training coordinators try their best to accommodate everyone on first come first serve basis. In order to deliver training on a desired date to all our clients, abrupt cancellation can cause an utter chaos. Hence, we have to be very strict on our cancellation policy. Our cancellation policy clearly states that:

**If the cancellation is made prior to your confirmation, then a full refund or a reschedule will be honored to the Trio department of the College or University. However, if you wish to cancel the training after a confirmation has been received by Compansol, then the Trio Department of the College or the University is liable to pay a full amount for the hotel, airfare and car rental.**

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**Customer Signature**

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**Date**

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**Print Name**

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**Title**