

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

- Are there individual computers for all participants ? Yes No
- Is there a computer for the trainer ? Yes No
- Is Blumen Demo installed on all computers ? Yes No
- Is Microsoft Word installed on all computers ? Yes No
- Is Microsoft Excel installed on all computers ? Yes No
- Is Internet connection available on all computers ? Yes No
- Is there a printer driver installed on all computers ? Yes No
- Do users have administrative rights to the computers ? Yes No

2. Audio / Visual Setup

- Is there an LCD Projector available ? Yes No
- Is there a projection screen available ? Yes No
- Is there a writing board available ? Yes No

3. Additional Requests

- Does the trainer need to install Blumen on any computers ? Yes No
If yes, Number of computers _____
- Does the trainer need to check Blumen Data ? Yes No

- 4. Have you received the training workbooks ? Yes No
- 5. Do you require a custom training agenda ? Yes No
If Yes, have you faxed the custom training agenda ? Yes No
- 6. Have you faxed / e-mailed the list of participants ? Yes No

7. Training Location

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

From: _____ **Phone Number:** _____

University/College: _____ **Fax Number:** _____

TRAINING AGENDA

The instructor will explain basic and advanced features of Blumen required to properly generate the Annual Performance Report. The topics that will be covered are based on the time available for the training. Two days of Onsite Training is recommended to cover all the listed topics for both the sessions in detail.

Use this document if you want to customize the training agenda.

1st Session (Basic Introduction to Blumen)

YES

1. Navigating around BLUMEN
2. Using the Ratio Meters
3. Setting System Preferences
4. Creating New User Accounts
5. Browsing Student Data / Using the Sidebar
6. Adding New Student
7. Adding Contact Log
8. Customize User Choices
9. Change Social Security number
10. Quick Change Wizard
11. Quick Edit - Student Data
12. Adding End Status
13. Adding APR Subjects / Instructions
14. Running Reports, Labels, Graphs
15. Generating the Annual Performance Report (APR)
16. Running PE Points
17. Copy APR data from previous year
18. Upgrade to Next Fiscal Year
19. Making a Backup of Data Files

2nd Session (Advanced Data Entry Techniques and Custom Reports)

YES

1. Using Global Filters
2. Adding New Report / Label
3. Adding New Excel Report
4. Mail Merge with MS Word
5. Adding Personalized Letters
6. Mass E-mailing
7. Understanding Data Dictionary
8. Managing Drop Down Lists
9. Managing Custom Fields
10. Managing School / College List
11. Managing Activity/Services List
12. National Student Clearinghouse Interface for Alumni Tracking
13. Setting User Rights (Access-level)
14. Adding Attendances / Stipends
15. Class Scheduling / Copying classes from previous semester
16. Using the Asset/Inventory Management
17. Sending Message to Users / Reading your messages
18. Time Clock Manager

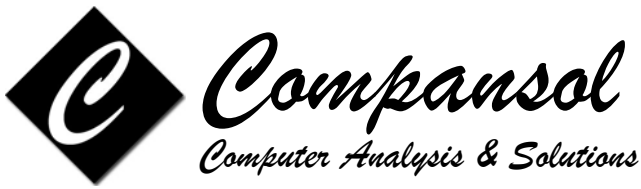
Additional topics you want to add.....

From: _____

Phone Number: _____

University/College: _____

Fax Number: _____



Cancellation Policy for On- Site Training

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 a 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 21 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.

Customer Signature

Date

Print Name

Title