

SERVICEPOINT AND ART TRAINING REQUIREMENTS AND CONSIDERATION GUIDE

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INTRODUCTION

Due to the comprehensive nature of ServicePoint™ and ART, training is a critical aspect of your implementation. Needless to say, it is unreasonable to expect each employee who attends one or more of the training classes to walk away with full knowledge and understanding of the software! There is a learning curve, and the length of time required to reach the other side of that curve is greatly influenced by the seriousness you and the attendees place on the learning process.

The capacity to learn varies with each individual, but there are steps that can be taken to optimize this capacity, thereby enhancing their ability to set-up and/or use the software post-training. Included below are physical and environmental considerations that will help meet this goal. Please give each item serious consideration and notify us of any item that you may find difficult to provide.

ENVIRONMENTAL ISSUES

Room

- ▶ Large room with enough seating capacity to accommodate all attendees. A classroom setting with PC's is most effective. If not available at your location, this setting can often be found at a local community college, university, or business center.
- ▶ Adequate lighting, ventilation, and temperature.
- ▶ Enough desk space to accommodate "note taking", as well as the computer.

Training Class Size Recommendations

- ▶ **System Administrator Training:** A two (2) student class is ideal for this intensive 3-day training. For larger installations of ServicePoint, three to five (3-5) students may be necessary. Due to the scope and intensity of this type of training there is a maximum class size of five (5) students.
- ▶ **Agency Administrator Training:** We recommend keeping this 2-day class under twelve (12) students if at all possible. A maximum class size of five (5) students.
- ▶ **End User Training:** We recommend that this 1-day class have between ten and fifteen (10-15) students. It is a good idea to keep the class sizes as small as possible and to train students with similar workflow or data security concerns (i.e. domestic violence center and HIV clinic personnel together). A maximum class size of twenty (20) students.
- ▶ **CallPoint Administration:** This training goes over the system configuration for CallPoint, how to create call records, capture assessment data, and interpret the Call Record report. A minimum three (3) hour course with a maximum class size of five (5) students. Typically offered as a webinar.
- ▶ **CallPoint End User Training:** This course is offered for a minimum of three (3) hours with a maximum class size of five (5) students. Typically offered as a webinar.
- ▶ **CommunityPoint Training:** This three (3) hour webinar training will prepare site administrators to manage resources, volunteer opportunities, and agency needs within the application. A maximum class size of five (5) students. Also available as an on-site training.
- ▶ **HousingPoint Training:** This three (3) hour webinar training will cover the administration of HousingPoint which includes sending mass emails, generating statistics, and managing the housing inventory contained within. A maximum class size of five (5) students. Also available as an on-site training.

- ▶ **Report Training:** This 1-day course goes over how to interpret your data, which reports are available and which appropriate for your implementation. A maximum class size of twenty (20) students. If this is the only training needed (standalone) it can be done as a Webinar.
- ▶ **Understanding Reports:** A two (2) day training with a maximum class size of twenty (20) students. This training focuses on the reporting topics of your choice, including how to interpret your data and which reports to use in both ServicePoint and ART.
- ▶ **ART Administration:** A three (3) hour course with a maximum class size of five (5) students. Also available as a webinar.
- ▶ **ART Basic Report Modification:** A three (3) hour course with a maximum class size of five (5) students. Typically combined with ART Administration. Also available as a webinar.
- ▶ **ART Report Creation:** A two (2) day training with a maximum class size of five (5) students.
- ▶ **ART Report Viewing:** This thirty (30) minute course has a maximum class size of twenty (20) attendees. It is typically included in ServicePoint End User training. Also offered as a webinar.

SOFTWARE/HARDWARE REQUIREMENTS

Workstations

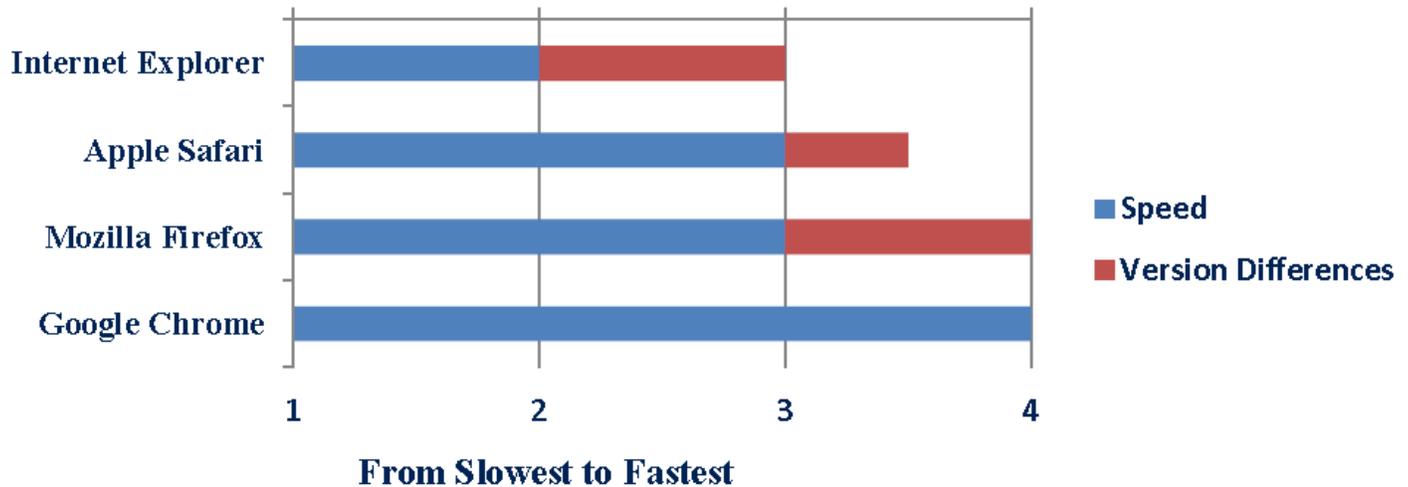
- ▶ One (1) PC for each student.
- ▶ One (1) PC for the Implementation Specialist.

System Requirements

- ▶ Intel-compatible 2GHz+ processor.
- ▶ Minimum of 40 GB Hard Drive.
- ▶ Minimum of 2GB RAM.
- ▶ Network card.
- ▶ LAN or always-on High Speed Internet Connection (Cable, DSL, Fiber-Optic).
- ▶ Recent version of Internet Explorer, Google Chrome, or Mozilla Firefox with proper browser settings for use with SSL based websites.
- ▶ One of the following operating systems:
 - ▶ Windows 10, both 32 bit and 64 bit.
 - ▶ Windows 8, 8.1, both 32 bit and 64 bit.
 - ▶ *NOTE: Mouse and Keyboard supported only. Touchscreen is not officially supported.
 - ▶ Windows 7, both 32 bit and 64 bit, up to Service Pack 1.
 - ▶ Windows Vista, 32 bit and 64 bit, up to Service Pack 1.
 - ▶ Windows XP, 32 bit and 64 bit, up to Service Pack 3.
 - ▶ Macintosh operating systems are not officially supported but work with ServicePoint. They do not work with ART as SAP/Business Objects does not support Mac/iOS.

Browsers

Below is a summary of our analysis of the four major Web Browsers' handling of JavaScript Speed.



- ▶ Internet Explorer 11 is much faster previous Internet Explorer versions.
- ▶ Each new release of Firefox tends to be incrementally faster than the previous.
- ▶ Most Firefox versions are faster than any Internet Explorer version.
- ▶ Safari tends to fall between Firefox and Chrome.
- ▶ Chrome has been maintaining its lead as fastest of all.

Other Workstation Requirements

Strongly Recommended: Confirm the accessibility of the site to be used for training purposes at least two days prior to ServicePoint training. To do so, obtain a username and password from your trainer or training coordinator and login to the training site. Navigate through all navigation tabs and check that no error messages are encountered. This allows time to correct any browser, workstation, or network issues that may interfere with the use of ServicePoint.

IMPORTANT

If "Page cannot be displayed" appears, try clicking the refresh button on the browser. If that does not correct the problem, type the site address in manually. If you still get "Page cannot be displayed", you may have setup problems.

- ▶ Ensure WinZip or other .zip-compatible compression utility is loaded on the Implementation Specialists computer. This is needed for the purpose of demonstrating ServicePoint's reporting abilities.
- ▶ Ensure the Implementation Specialist's computer is able to download files for use with ServicePoint's reporting abilities.
- ▶ Identify any local proxy servers or firewalls that may inhibit access to the ServicePoint training site.
- ▶ Ensure there is enough electrical power outlets, extension cords, etc. to accommodate electrical equipment.

Training Equipment

- ▶ LCD Projector (to be connected to the Implementation Specialist's computer)
- ▶ Flipchart and Markers
- ▶ Tape (to post flipchart sheets)
- ▶ White Board, Markers, Eraser

ADVANCED REPORTING TOOL TRAINING REQUIREMENTS

If training for the Advanced Reporting Tool (ART) is to be conducted, the requirements described above must be in place along with the following additional requirements.

Port Requirements

The following port must be open on the network where the ART Reporting will take place:

- ▶ Port 443

This port controls secure connections (https://). ART will not work properly if this port is not open.

Java Version and Update

As the ART User, you will need to modify the **Java Applet Runtime Settings**. This will allow the browser to access enough available memory for complex data join manipulation required to use the generic template universe(s).

You must first verify that the workstation has the Java applet installed. To do so, access the control panel and ensure the Java icon (a coffee cup with steam) is displayed on the screen (see Figure 1 ❶).

*If using Windows 7, be sure the orientation of the Control Panel screen is set to **Large Icon** view.*

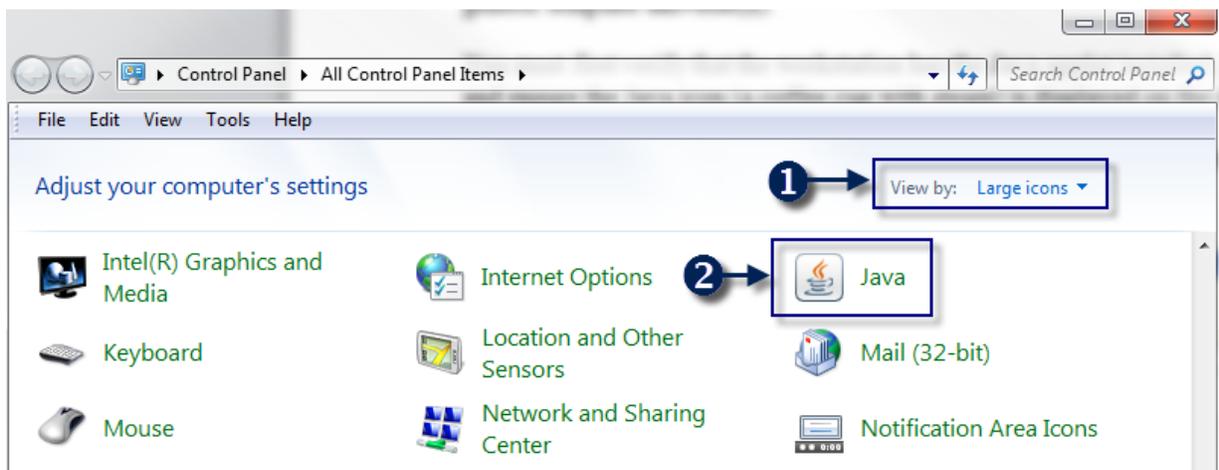


Figure 1

If the Java icon cannot be located on the Control Panel screen, Java has not been installed. Download the Java applet from <http://www.oracle.com/technetwork/java/javase/downloads/jre7-downloads-1880261.html>. Java Version 7 update 72 has been tested and confirmed to work with ART 3.1. Follow the instruction supplied. You may need Administrator permission for your machine to install software. Contact your System Administrator for assistance.

Once icon is found, follow these steps:

- Double-click the Java applet on the control panel.
- Click the **Java** tab
- Under **JAVA Runtime Environment Settings**, select **View** (see Figure 2 □),
- Under the **Java Runtime Parameters** column, select the Location column cell and press the spacebar to give focus to the cell (see Figure 2 □)
- Type: **-Xmx250M**
- This memory setting can be incrementally increased to maximize speed and performance based on the amount of RAM installed in the computer General guidelines:
 - 1GB RAM 150 – 200M
 - 2GB RAM 200 – 250M
 - 4GB RAM 250 – 300M
- Click **OK** (on JAVA Runtime Settings screen)
- Click **OK** (on JAVA Control Panel screen)

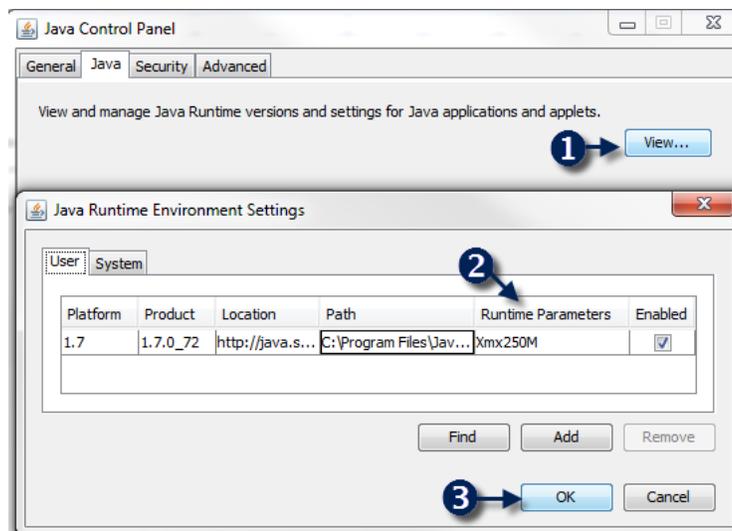


Figure 2

Export Options

- One of the features of the Advanced Reporting Tool is the capability to export into the PDF format. Once a report is in PDF format, ART / Business Objects uses Adobe Acrobat Reader as a plug-in to display the report. To help prevent the appearance of a slow system, make sure the most recent version of Adobe Acrobat Reader is installed.

Versions 7.0.2 or higher have many speed enhancements in rendering and displaying PDF documents. The latest version of Adobe Acrobat Reader can be downloaded at the following URL: http://www.adobe.com/products/acrobat/readstep2_allversions.html

- ▶ ART is also capable of exporting into a Microsoft Excel formatted spreadsheet. Programs such as Open Office or Microsoft Excel are capable of opening this format.

Pop-up Blocker Settings

ART utilizes pop-up windows and it is necessary to mark your ART site as a trusted site/exception. Below is an example walkthrough for Internet Explorer 11.

1. Navigate to the Tools-> Pop-up Blocker-> Pop-up Blocker Settings. (See Figure 3)

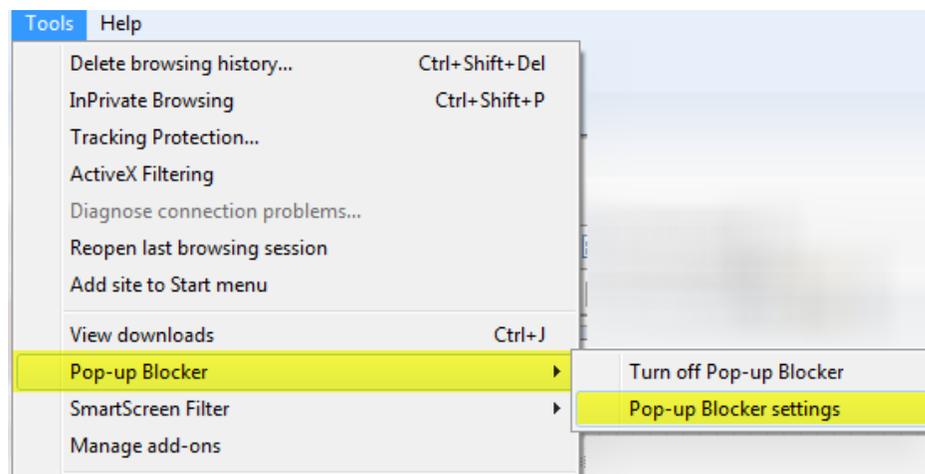


Figure 3

2. The **Pop-up Blocker Settings** window displays. (See Figure 4)

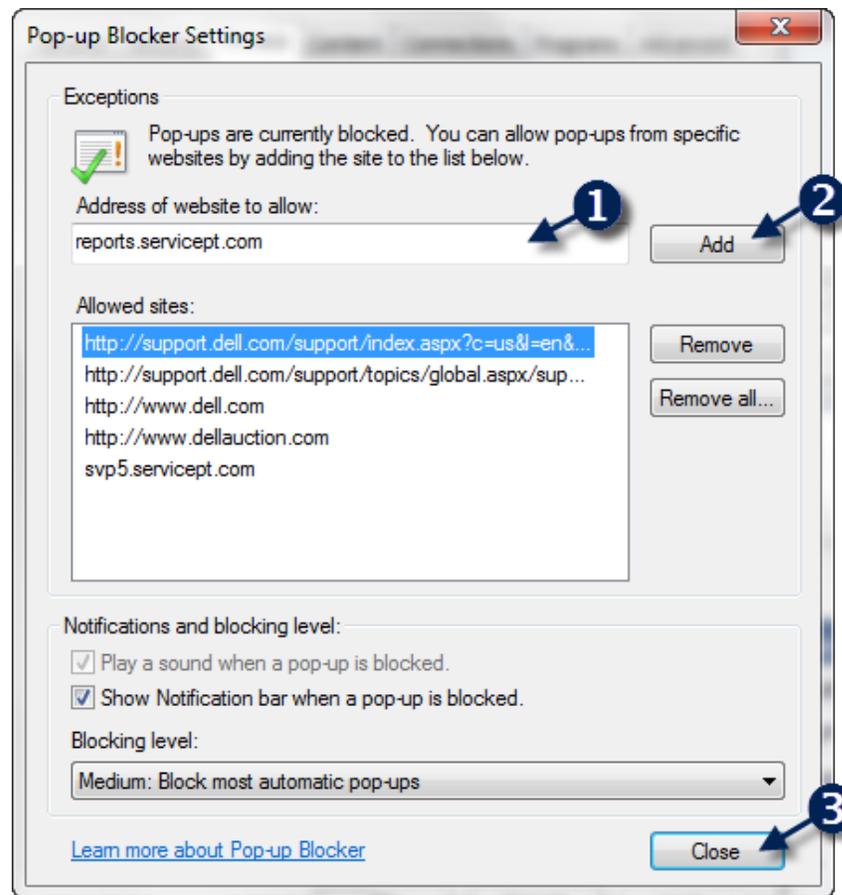


Figure 4

3. All ART reports are located on the following address: <https://reports.servicapt.com>. Please type this address into the “Address of websites to show” textbox. (1)
4. Click the **Add** button. (2)
5. The URL, **reports.servicapt.com**, will display in the **Allowed sites** text box.
6. Click the Close button to save the settings and close the window. (3)

WARNING

Do not right click the pop-up dialog box and select “Allow Once”. The page will refresh and all work completed since the last save will be discarded (see Figure 5)



ATTENDANCE ISSUES

- ▶ Appropriate coverage (as needed) for those individuals who will be attending training classes.
- ▶ Commitment by the attendees to remain throughout class time.
- ▶ Cell phones turned off or set to silence / vibrate

KEEP OUTSIDE INTERRUPTIONS TO AN ABSOLUTE MINIMUM.

VERSION HISTORY

Date of Revision	Document Version #	Revision Notes
2014/11/20	V01	First Release of Document
2015/01/06	V02	Updated System Requirements for Java, Browsers
2017/03/17	V03	Updated with Mediware formatting. Updated System Requirements with Windows 10