



BluePrint

BUSINESS INTELLIGENCE

User Training Offering

CONTENTS

- 1. Purpose of the document..... 2
- 2. Training offering for different users 2
- 3. Prerequisites for training 4
- 4. Certification 5

1. PURPOSE OF THE DOCUMENT

The purpose of this document is to provide a breakdown of the different training courses offered by BluePrintBI. The course material is grouped along certain user roles in BluePrintBI.

The emphasis of our BluePrintBI training approach is to enable process accountability as a culture within an organisation with the different modules covering the full life cycle of process definition: Strategy, Methodology, System Functionality and Reporting.

2. TRAINING OFFERING FOR DIFFERENT USERS

Training Course and Duration	Modules Included	Process Creator	Process Editor	Process Authoriser	Process Viewer	Management Viewer	Risk User	Data Maintenance	Super User
Module 1: Editor 4-6 hours	<p>Alignment to company strategy</p> <p>Basics of process definition methodology</p> <p>Create a process</p> <ul style="list-style-type: none"> - Allocate key process attributes <p>Create a task</p> <ul style="list-style-type: none"> - Allocate key task attributes - Map complex process flows - Reuse of processes and building value chains - Attach Sub-processes <p>Process statuses and life cycle</p> <ul style="list-style-type: none"> - New Process - Awaiting Authorisation - Authorised (including who are able to authorise) - Edit After Authorisation - Archived - Period Review <p>Process Enrichment</p> <ul style="list-style-type: none"> - Add task durations - Identify inputs, outputs and reporting - Add supporting documents and templates - Identify task level inefficiencies - Utilising the document library and linking supporting documents <p>"Work-in-Progress" versus "Published" Process Universes</p> <p>Searching for a process</p>	X	X	X	X				X

Training Course and Duration	Modules Included	Process Creator	Process Editor	Process Authoriser	Process Viewer	Management Viewer	Risk User	Data Maintenance	Super User
Module 2: SourceFusion 4-6 hours	Alignment to company strategy Create a process template Populate a process template Upload a process template								X
Module 3: Setup and Data Maintenance 2-4 hours	Alignment to company strategy Static data maintenance - Employee and user creation - User role allocation - Process access control Maintenance -Reporting - Tools - Control Objectives - Document library and document version control							X	X
Module 4: Risk, Compliance and Governance Editor 2-4 hours	Alignment to company strategy Risk Quantification - Define process inherent risks - Apply risk mitigation - Log risk incidents on tasks Governance - Define control frameworks - Add process and task level controls Risk Incident Capture Template Guide						X		
Module 5: Web Viewer - For Operational Use 2-4 hours	Alignment to company strategy Use of the Web Viewer as a tool for training, role definition and standard operating procedures tool: Search for a process Generate and view process documentation - Summary and detailed reports - Process flow diagrams - Supporting documentation - Sub-process detailed reports and process flow diagrams	X	X	X	X	X			X

Training Course and Duration	Modules Included	Process Creator	Process Editor	Process Authoriser	Process Viewer	Management	Viewer	Risk User	Data Maintenance	Super User
Module 6: Web Viewer - For Management Reporting 2-4 hours	Alignment to company strategy Management Reports - Control Objectives Process Hierarchy - Inefficiencies per Category and Inefficiency Detail Export - Inherent Risk Detail Export - Risk Incident Detail Export - Process Status Count Report and Process Status Detail Export - Process Hierarchy Task Count Report - Technology Usage Report - Task Duration Report Filtering Management Reports Exporting data from Management Reports					X			X	

3. PREREQUISITES FOR TRAINING

For the training to be most effective, the following are the minimum requirements and should be confirmed to be in place by the client prior to training sessions being started:

1. A training room should be provided with:
 - a. Desk seating for all the students
 - b. Video projector and screen
 - c. A facilitator/training assistant for every 4 students
2. Each student should have:
 - a. Their own laptop with BPBI installed and access to the BluePrintBI Test Environment
 - b. A username and password BluePrintBI in the Test Environment.
3. Set up of users connected to a BluePrintBI test environment:
 - a. Editors, super users and data maintenance users need access to the Desktop Application as well as the Web Applications.
 - b. Users with Viewer- only access will only need access to the Web Application
4. Editors need Microsoft Visio installed on their laptops.

4. CERTIFICATION

The facilitators/training assistants will assess the progress of the students throughout the sessions. On condition that certain basic skills levels were attained, students will receive a certificate on completion of the relevant module successfully completed.

Certificates will be provided for the following modules completed:

1. **Certified Editor** (module 1)
2. **Certified Governance Enabler** (module 1, 4, 6)
3. **Certified Super User** (module 1, 2, 3, 4, 5, 6)

5. CONTACT US

Please contact our support team, should you require any additional information regarding the BluePrintBI training modules on offer.

Email: support@blueprintbi.com