



The Blue Building
4/8 Whites Grounds
London SE1 3LA

Project-base User Training

Objectives of the Training

Project-base User Training aims to train users to use the relevant Project-base features and functions. Thus enabling the user organisation to reap the maximum benefit from Project-base, by developing enthusiasm and confidence in all users.

Attendees

It is recommended that the following individuals attend the User Training:

- Management sponsoring the Project-base implementation
- Database Administrator/Supervisor
- Users

NB User Training is usually more effective with 6 or fewer attendees, so limiting group sizes may be beneficial.

Training Preparation

It is wise to leave enough time between Supervisor and User Training to configure Project-base and install it on to all relevant computers. Please ensure that the installation of Project-base system is complete, prior to booking User Training sessions.

Ensure in particular, that any portable PCs to be used are fully configured with synchronisation (both set up and tested). Do not leave a gap between training and Project-base availability.

Confirm that all of the stated objectives of the Supervisor Training have been met.

Refer to the attached list of possible objectives to identify the relevant features and check that all set up and configuration is complete.

Depending upon prior experience of users with Windows based software; it may not be possible to successfully meet all User Training objectives with a single training session. KMS are happy to offer advice regarding this matter.

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Customer Preparation for User Training

Training Objective	Preparation Required
Finding information on the database	A copy (i.e. not the master copy) of the actual customer database or the KMS demonstration database should be available.
Adding, editing and deleting Companies, Contacts and Projects	All field labels and look up lists should be completed and in place.
Adding editing and deleting Enquiries, Orders and Lost Orders	Product tables should be in place if they are to be used.
Producing quotations	Quotation reports should be written, tested and in place within Project-base
Using the Project-base diary system	User company and all trainee user details should be in place.
Using the tagging and filtering system	
Writing to single contacts using the Project-base letter writer	Some standard letters should be prepared.
Writing to single contacts using an external word processor	The link to the external word processor and any macros required should be in place. Users should know how to use the external word processor.
Performing mailshots via the Project-base letter writer	Some standard letters should be prepared.
Performing mailshots via an external word processor	Users should already have some knowledge of mail-merging with the external word processor
Importing data from external sources	Decisions should have been made on how to handle and distribute external databases. Project-base should be configured to handle imported in project descriptions.
Running standard Project-base reports	Relevant Project-base reports should be identified. Irrelevant reports can be removed from the Project-base menus.
Synchronising portable computer databases with HQ database	The method of synchronisation should be decided, set up and tested.
Running custom reports	Reports should be prepared and made available via Project-base custom report menus.

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