

Agenda of Manuals Training

The Board of Directors County School District

A Manuals Training of the Board of Directors of County School District will be held Thursday, January 3, 2019, beginning at 7:00 PM in the Board Room (second floor), 12345 Yellow Brick Lane, Austin, TX 12345.

The subjects to be discussed or considered or upon which any formal action may be taken are listed below. Items do not have to be taken in the same order as shown on this meeting notice. Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time.

1. Pre Webinar / Training Tasks and notes

In General,

Description will contain general notes and key points

Discussion will be more of a specific script

A. Pre Training Account Prep

Account should be created

Users added to the account, login information not given till after class

This training is done from the user's account

Have policy docs downloaded and unzipped on your system

B. Logins for training - not used - login as yourself

C. Invite email

Excel

Open the 'Premier Training Request' spreadsheet located at I: Sparq\Training

On the 'Manuals' tab, check for account to be trained. Due to their relative rarity

Manuals trainings are usually single org:

Copy the email addresses of the students to Word

Word

Parse the addresses with a semicolon ; and space between each address

Zoom

Create event / webinar in Zoom

Schedule a meeting

BoardBook Manuals Training Webinar

Date Time

1 hour duration

Security: Use generated passcode

Uncheck waiting room
Video: Host and Participants - off
Audio: Computer Audio only

Outlook

Forward a previous training invite email subject 'BoardBook Manuals Training'
Update the subject line, remove FW,
Copy the student email addresses from Word to the BCC location.
Add your own email address to BCC
Update the date in the opening paragraph
Update the Zoom info toward the bottom of the email
Double-check the email
Send Email

2. Course Introduction and Overview

Thank students for joining.

Review course outline from slides

3. How to get Help and Support

Show Phone number and Email address at the bottom of the screen

Call out this appears on every screen

Verbally describe steps to get to the support screen.

Really stress they need to remember this.

On the support screen scroll to the bottom and call out the 'Online Documents and Policies' document

4. Final questions, next steps

Any final questions

Remind of Support Page

Strongly recommend setting up Practice meeting as soon after training as possible.

Specifically mention walking through the support videos while setting up practice meeting as something some users find helpful.

Discuss post training email (that you will be sending)

Thank for attending

5. Course Content

A. The 'No Folder'

Key points

System created, cannot be removed or renamed

Can be used as MISC folder

If another folder is deleted which still contains files, those file will be automatically moved here as a safety check

B. How to add Folders

Add first folder using the names from the example ZIP

Mention that folders will automatically sort to alphabetical order

Note that other than the 'No Folder', folders can be renamed or deleted

Go ahead and add 2 more folders using the names from the example ZIP

Discuss that a folder with no public documents will not appear on the public page

C. How to add Files

Return to the first named folder

Add the attachment from the example ZIP for this folder

Use the 'Click to open file browser' option

Review Edit filename option

Review Permissions

Review Delete option

Review 'move to other folder' drop down

Navigate to the second folder

Add attachments from the second folder from the example ZIP using Drag and Drop

Discuss files adding in order by size and conversion speed

Show reorder files

Demonstrate Drag & Drop

Demonstrate auto Alphabetical

Add additional folders and files if you feel repetition is needed

D. Viewing Documents

Demonstrate Document View: Books / Policies View

Discuss but do not demonstrate Search

Discuss that search won't work until uploaded files are indexed and this may take an hour or more

E. The Public Page

Show how to get to the Public Page

Show URL

Demonstrate clicking on a folder / file

Remind of same search options seen earlier

F. Questions and Next Steps

Remind how to find help

Explain will send post training mail with login info

6. Post Training Steps

Update Training Request spreadsheet

Send post training email

Essentially, this is simply a thank you for attending, login credentials, reminder on how to get public link and how to get help