

Training Description

The purpose of this ten day training session is to introduce RMS and Mercury functionality related to profile information, collecting and processing applications, taking contracts, and payments, room assignments, accounting, and reporting.

Attendees

This training is designed for key housing staff who will be the primary administrative users. These primary users will then be able to train student and other limited users. The project team (who is in charge of your assignments, accounting, applications, cancellations, IT (applications/development) etc.) should attend. They can pull in additional staff members who are deemed appropriate. We recommend a maximum of 5-12 people participate in this training. Student staff such as RAs, desk staff, etc. should not attend this training; they may be trained by your staff, as appropriate, at a later time.

Week 1 - Day 1

Time	Topic	Details
9:00-9:15	Workstation check	What we are covering this week Demo the related topics Where are the things we are working with this week located
9:15-10:30	Overview	Overview
10:30-10:45	Break	
10:45-12:00	Overview Cont'd	Overview
12:00-1:15	Lunch	
1:15-3:00	RMS Admin Module	Where do things come from – basic set-up Accounting Applications Rooms Interfaces Import Profile – which fields you can/cannot change
3:15-3:30	Break	
3:30-5:00	RMS and Mercury Navigation	Advanced Search results filtering

Week 1 - Day 2

Time	Topic	Details
9:00-10:15	Profile	Show info that came from interfaces RMS screens Mercury template options Categories Create new Profile
10:15-10:30	Break	
10:30-12:00	Build a profile template	Template Data Wizard Parts of a template General Components Person Components Profile, Contact, Addresses
12:00-1:15	Lunch	
1:15-3:00	Application Process	Application periods Mercury Application examples Build an application template Room/Plan preferences Roommate Pref Roommate Match Process Summary
3:00-3:15	Break	
3:15-4:00	Application Process	App User defined fields
4:00-5:00	Practice	Template Building

Week 1 - Day 3

Time	Topic	Details
9:00-10:30	Contracts	Build a Contract Signature Policy Manage Contracts Generated Contracts Required Contract Step/Put contract on template Advanced uses for contracts
10:30-10:45	Break	
10:45-12:00	Payments	Web Payment Items Payment Results
12:00-1:15	Lunch	
1:15-3:00	Finish/Cancel Processing/Display Settings	Redirecting Conditional Emails – using the editor/context data Custom Processing Workflow Cancel Processing Display Settings
3:00-3:15	Break	
3:15-5:00	Template Building	Template Building

Week 1 - Day 4

Time	Topic	Details
9:00-10:30	Template Availability and Room List	Template Availability Creating Categories Filters Flags No Access Processing Room List
10:30-10:45	Break	
10:45-12:00	Design Tools	Manage Styles Default Styles Labels (Mercury and RMS) Message Display Fonts
12:00-1:15	Lunch	
1:15-3:00	Profile and Applications in RMS	View Application/App User Defined Screen Preferences screen New Add Current Waitlist Cancel Applications (distinguish from bookings) Template example Other Occupants Parking
3:00-3:15	Break	
3:15-5:00	Practice	Template building and RMS practice

Week 1 - Day 5

Time	Topic	Details
9:00-10:15	Correspondence	Correspondence History Ad Hoc correspondence Examples (Record, Email, Text) Determine if they need mailmerge help or if it can be skipped
10:15-10:30	Break	
10:30-12:00	Reporting	Easy Report Builder Report List (permission groups and reports) Manage Reports Dashboard Revisit Filters in the context of the ERB
12:00-1:15	Lunch	
1:15-2:45	Business Process and template Building	Create a to-do list based on Business Process needs (templates, reports, filters) Build templates, reports, filters
2:45-3:00	Break	
3:00-4:00	Business Process and template Building	Build templates, reports, filters

Week 2 - Day 1

Time	Topic	Details
9:00-9:15	Workstation check	What we are covering this week Demo the related topics Where are the things we are working with this week located
9:15-9:30	Recap Week 1	
9:30-10:30	Overview for Week 2	Assignment Options Manual Alloc Auto Alloc Self-Assign Room retention vs Roommate Pull-in vs GRS Demo the templates for each Living Area Maps and Suite Management New Booking (template vs RMS) Room and Plan Management Accounting Reporting
10:30-10:45	Break	
10:45-12:00	Overview for Week 2, cont'd	Assignment Options Manual Alloc Auto Alloc Self-Assign Room retention vs Roommate Pull-in vs GRS Demo the templates for each Living Area Maps and Suite Management New Booking (template vs RMS) Room and Plan Management Accounting Reporting
12:00-1:15	Lunch	
1:15-3:00	Self Assignment	Retention Template Template Data Wizard Components Details Booking Term Selection Retention Room Lock Status (intro)
3:00-3:15	Break	
3:15-5:00	Self Assignment	Roommate Pull-in Template Template Data Wizard Components Details Room Booking Selection Roommate Group Roommate Pull-In Filters Roommate PIN (template example)

Week 2 - Day 2

Time	Topic	Details
9:00-10:30	Self Assignment	Living Area Mapping and Suite Management Room List Management Impact of Room Configs, etc on what shows up in template
10:30-10:45	Break	
10:45-12:00	Self Assignment	General Room Selection Template Template Data Wizard Component Details Room Selection Room Lock (detailed) Roommate Group (detailed)
12:00-1:15	Lunch	
1:15-3:00	Self Assignment	General Room Selection Template Cont'd Plan Selection Template Data Wizard Component Details Plan Selection Plan List Management (Categories and Mapping)
3:00-3:15	Break	
3:15-5:00	Self Assignment	Booking Date Selection Example (Early Arrival or Late Stay) Template Data Wizard Component Details Booking Date Selection

Week 2 - Day 3

Time	Topic	Details
9:00-10:15	Manual Allocation	Qualification Criteria What do they need? Manual Allocation in RMS Nominating Rooms/Terms Staff-Facing Manual Allocation template Pro's and Con's of each method
10:15-10:30	Break	
10:30-12:00	Auto Allocation	Auto Allocation Screen Roommate Report Qualification Criteria Eligibility Criteria Room Criteria Set-Up Desirability
12:00-1:15	Lunch	
1:15-3:00	Room and Plan Management	Undo Allocation Delete Booking Delete Booking vs Undo Allocation and cancelling applications Intro to Fee Assessment demo for one person show pro-rations Create Break Change Rates Change Rooms Propagation Swap Room Change Dates Roommate (discuss how room Configs impact this; Mercury template option) Waitlist management Check-In and Check-Out RMS vs Mercury Run a Fall Check-In template Run a mid-Semester Check-In template New Booking New Booking Vs Allocation (Manual and Auto) Plan Management
3:00-3:15	Break	
3:15-5:00	Room and Plan Management Cont'd	From above.

Week 2 - Day 4

Time	Topic	Details
9:00-10:15	Room Module	Tools Folder Inventory and Maintenance Closures Closures vs Frozen Rooms Housekeeping Room Configs/Building Set-Up in Admin Module
10:15-10:30	Break	
10:30-11:00	Room Module Cont'd	
11:00-12:00	Accounting	Accounting Set-Up Account Names Transaction Types (and Taxes, if applicable) Rates Mercury Web Payment Item review
12:00-1:15	Lunch	
1:15-3:00	Accounting	Fee Assessment (bulk) Recommended business practices Rate Calculator Charges and Credits Statement Inquiry Export Finance and Clear Balance Payment Gateway and Payment Results in Mercury
3:00-3:15	Break	
3:15-5:00	Accounting	Payments and Apply Credits to AR Refunds Liabilities/Liability Refunds Ledger View Invoices Transfers Related Reports End of Day Management

Week 2 - Day 5

Time	Topic	Details
9:00-10:15	Reporting	Easy Report Builder, Build a Roster Telerik Reporting Needs
10:15-10:30	Break	
10:30-12:00	Business Process	Update to-do list based on Business Process needs (templates, reports, filters)
12:00-1:15	Lunch	
1:15-3:15	Template Building	Template, Report, Filter building
3:15-4:00	Final Review and Wrap Up	