## Training Plan - WASWUG

**Session Title as Posted on the WASWUG App:**

**Instructor:**

**Length of training:**  Single Session  Double Session  Pre-conference

**[NOTE**: Delete all canned comments, instructions, explanations, and examples from this template as you complete your Training Plan.

The purpose of this Training Plan is to help you prepare for your session at WASWUG and to ensure that your presentation achieves your objectives.]

**Objectives**

[Objectives are similar to performance outcomes. For WASWUG it might be helpful to think of these as your Agenda – a list of what *you* intend to do or demonstrate during your session.

*Example:*

[Choose one –

In this session you’ll see…

In this session I’ll show you…

In this session I’ll demonstrate…]:

* How to …
* When to …
* Whether…
* A scenario of…
* An example of…]

**Resources**

1. Flash drive backup that contains:
   * Copy of your WASWUG PPT
   * Copy of all supplemental handouts for your session
   * Copy of any Guide your presentation may reference
   * PDF copies of any reports you want to show
   * Copy of this Training Plan
2. Database with prepared dataset for use during your session (demonstration)
   * Any reports that you intend to show (already generated, so you’re not waiting in your session while they run)
3. Props to help you demonstrate concepts during your session
4. Etc.

**Lesson Plan and Instructional Delivery Method**

The lesson plan organizes the major and minor components of your presentation. Use the plan to avoid missing any points or check-in question opportunities, and as a map for how you intend to deliver the content.

Because the majority of WASWUG sessions are presentations and do not involve more than verbal check-in opportunities, the delivery method is typically (S) for Show. For more about delivery methods see the WSIPC Guide for Instructors.

1. **Opening**
   1. **Title Slide <PPT> - Introduce yourself and your position at WSIPC**
   2. **Objectives Slide <PPT> – This is what they’ll get by attending**

*Sample:*

1. Explain Terminology <PPT>
2. Present schematic of process flow <PPT>
3. Start the Live Demo
4. PaC Add a Credit Card [S]
   1. District Card Name
   2. Card Number
   3. Expiration Month
   4. Expiration Year
   5. Vendor
   6. Location
   7. Card Limit
   8. Active and Restricted flags
5. PaC Check In/Check Out [S]
6. Credit Cards List
7. Check In a Credit Card
8. Check Out a Credit Card
9. WEB Credit Card Note Category Setup [S]
10. Description
11. Source
12. WEB Credit Card Group Setup [S]
13. Credit Cards List
14. Credit Card Group Information
15. Approvers
16. Credit Cards
17. Assign Groups utility
18. WEB Account Groups for Credit Cards Setup [S]
19. Brief Overview
20. WEB Credit Card Setup Options [S]
21. Credit Card Setup Options Area
22. Credit Card Approval Options Area
23. Batch Activity Options Area
24. WEB Access by Person Setup [S]
25. Access to All Credit Card Transactions
26. Allow Selection of All Open Purchase Orders
27. WEB Generic Import Setup [S]
28. List of Existing File Formats
29. Add File Format
    * 1. Code
      2. Description
      3. File Type
      4. Fields
30. Defaults
31. PaC Reports [S]
32. Credit Card Report
33. Credit Card Check Out History Report
34. Note the Export Process Occurs [T]
35. WEB Import Credit Card Transactions [S]
36. File Layout
37. Browse Selection
38. Automatically Approve the Imported Transactions Option
39. Run the Credit Card Import Utility
40. Preview Data to Process
41. Run Update
42. Verify Transactions Were Imported
43. WEB Mass Delete Credit Card Transactions [S]
44. Select Import File
45. Preview Data to Process
46. Remove Transactions From the Mass Delete process
47. Print the Verification Report
48. Run the Update

*End of Sample*

1. **Closing**
   1. **Join Us on Twitter <PPT>**
   2. **Final Questions/ Thank You slide <PPT> - ask if there are any final questions and thank attendees for coming**