

TRAINING FACILIATION GUIDE

FOR
CONDUCTING
CLIENT DEMOS

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CHECKLIST

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- Sign into a test account in **production**
 - Run through all features that will be used in the demo to ensure functionality has not changed

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- Create a **new packet** to be able to search for it to demonstrate searching

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- Create a **new packet** with start dates to show on the ***Due Today*** and ***Due Soon*** tiles

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- At least one day prior to the demo, create an **expiring document** to be able to demonstrate completing a Supplement B

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- Prepare or review an **existing slide deck** to have as a back up presentation tool

DASHBOARD

DEMO FEATURES

- ☐ **Logo** (Home) button
- ☐ Global **Search** bar
- ☐ **Icon Toolbar** (top right) - Tasks, Notifications, Announcements, Help, Settings, My Profile
- ☐ **Left Navigation** Menu
- ☐ **Center Dashboard** - Task Tiles and Data tab
- ☐ **Quick Action** Tiles

LOGO (HOME) BUTTON



Welcome to today's training session! My name is _____ and I'm happy to show you the features within the application! Let's start with an overview of the dashboard.

- To begin, the logo in the upper left corner of the screen serves as a "home" button to always bring you back to the dashboard landing page. The logo can be customized by an Organization Administrator to display your company's logo.



- DEMO: Click to navigate away from the dashboard home page, then click the upper left logo to navigate back.

DASHBOARD

DEMO FEATURES

GLOBAL SEARCH BAR



- Moving along the top of the screen, the global search bar appears at the top of any page you navigate to within the application. This allows you to easily search for a record no matter what screen you're working in. You can search by name or last 4 of the social security number.



- DEMO: Search for employee: Sample or last 4 SSN 5555 demonstrating the list that appears below the search bar.

ICON TOOLBAR (TASKS)



- Continuing along the top of the screen, the toolbar along the top has several features. When clicked, the first icon will reveal a list of tasks by due date. Clicking any of the categories will reveal a pre-filtered task list based on that category by due date. There is also a View All Tasks bar to access the complete list of all tasks regardless of due date.



- DEMO: Demonstrate the use of the clipboard icon to access the task list.

DASHBOARD

DEMO FEATURES

ICON TOOLBAR (NOTIFICATIONS)



- The next icon is the bell icon which indicates if you have new notifications in the portal.



- DEMO: Show how to access Notifications.

ICON TOOLBAR (ANNOUNCEMENTS)



- The Announcement or megaphone icon will alert you of new feature enhancements or other important information.



- DEMO: Demonstrate the use of the megaphone icon to access the announcements and release notes.

ICON TOOLBAR (HELP)



- The question mark icon allows for easy access to help features within the portal. Access knowledge base tutorial articles or frequently asked questions in the information tab of the Help menu. The phone tab will display the contact information to call Workforce Solutions Support for technical assistance by phone. The envelope tab is there to submit a technical support ticket.



- DEMO: Demonstrate the use of the Help icon to access the knowledge base articles, FAQs, searching help by topic. Click the phone icon to reveal support phone number and hours of operation. Click the envelope to show the support ticket submission screen.

DASHBOARD

DEMO FEATURES

ICON TOOLBAR (SETTINGS)



- The next icon is the settings wheel icon to access user management and organization settings. Some administrative users will have access to these areas of the application.



- DEMO: Show how the settings menu will access User Management and Organization Management.

ICON TOOLBAR (MY PROFILE)



- Finally, the person icon at the end is where you can access your profile. Within the settings menu of My Profile, you can adjust your email notifications. Simply select the checkbox next to the email alerts you wish to receive via email.



- DEMO: Demonstrate selecting and deselecting checkboxes in the My Profile notification settings page.

DASHBOARD

DEMO FEATURES

LEFT NAVIGATION



- Turning our attention to the left navigation menu - there are several areas within I-9 HQ that can be accessed by using the links in the left navigation menu. Items you see in your left navigation menu may be different than what I am showing.



- DEMO: Show how the left navigation menu can be locked open and collapsed using the >> at the bottom of the panel.

CENTER DASHBOARD



- In the center of the dashboard are task tiles sorted by due date; Those that are past due, due today, or due soon. If your company participates in E-Verify, you'll also and E-Verify tasks tile. The My Tasks tile is where you can select specific task types you'd like to track on your dashboard that aren't necessarily date driven.



- DEMO: Demonstrate selecting and deselecting task types in the My Tasks tile. .

SUMMARY

DEMO FEATURES

SUMMARY AND INVITATION FOR QUESTIONS



- We've covered a LOT of information in a short period of time!

To recap:

- We reviewed all of the dashboard
- We've searched for records
- We reviewed each of the toolbar icons and actions available in each.
- Finally, we covered the left navigation menu and center dashboard tiles

- I'd like to address any questions you may have at this time.

Answer participant questions and further demo features as needed to address and answer.



Thank you for allowing me to join you today for an overview demo! Have a wonderful day!

DEMO FACILITATION GUIDE

QUESTIONS?
CONTACT ME.

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