

Car example

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Logging into the Program

How can you access the program (computer, smartphone, telephone prompts, terminals, paper submission to be entered by another employee)

Your profile and how it impacts what you can do on the program.

Common Terminology

Record

Field

Database

Integration

Batch

...

Dashboard

Components of the dashboard

What each selection button means – Save, Next, Cancel, Update, Verify, Attach, Upload/Download, Export...

Checking your dashboard for warning lights or messages before continuing

Selecting your process from the dashboard and entering information

Do you have all the information needed to complete the task?

Where is documentation on the process if needed (full manual or quick entry guide based on your level of experience)

Where do I begin, what are the common screen options and layout I may need to be aware of while navigating the process?

Can I stop/start this process by saving it and continue later or do I need to enter it all at once?

Is this a date/time sensitive transaction? Does it require approval? Do I need to provide approval of other tasks or processes?

If this task requires approval do I need to continue the transaction at a later date and how will I know when it is approved?

What are the common errors in completing this process?

Who has the authority to edit this if I make an error?

Will this process need to be repeated on a regular basis (common intervals) or on an as needed basis?

