



CLIENT SOFTWARE USER TRAINING PLAN

VERSION 5.18 UPDATE 5
COMMERCIAL OFF THE SHELF

VERSION 1



REVISION HISTORY

| Revision | | By | Date |
|----------|----------|-----------|----------|
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| 1.1 | | | |
| 1.2 | | | |



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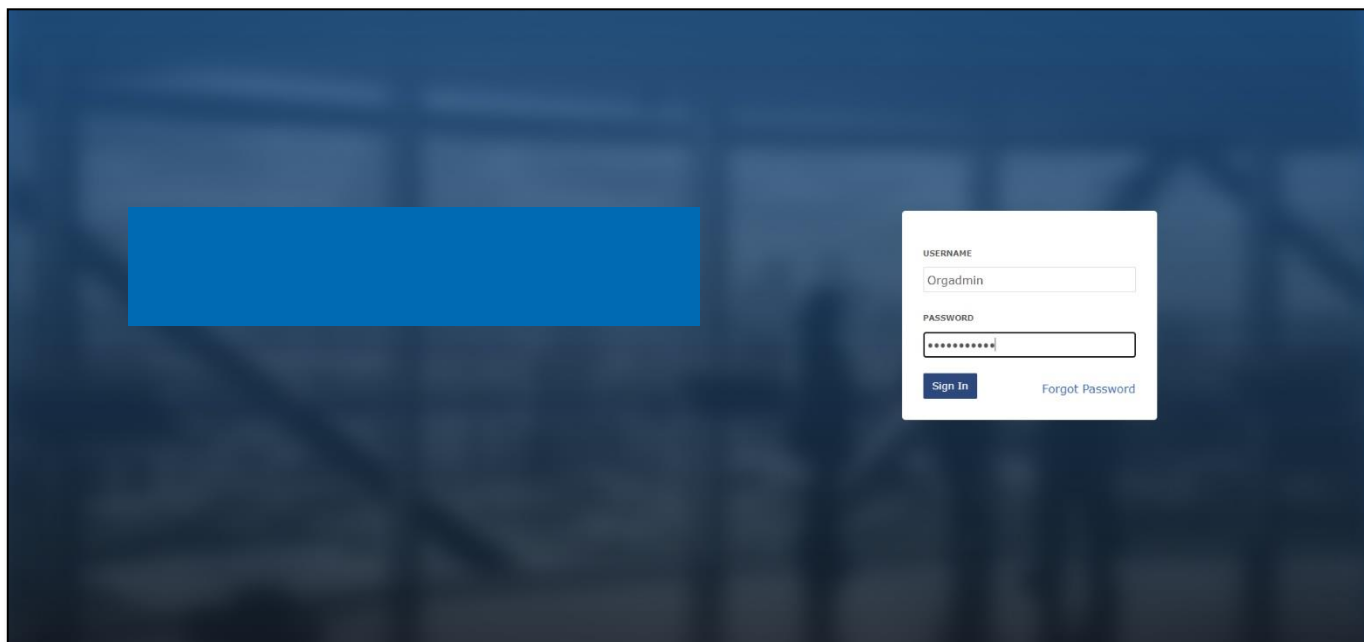
1 Overview

CLIENT is fully committed to providing our clients with an exceptional learning experience. To maintain the highest standards of quality, we diligently adhere to the outlined requirements of this document. These principles serve as the bedrock of our service, meticulously tailored to meet your unique needs.

While we understand the reality of budgetary and project constraints, we are dedicated to adapting the training process accordingly. However, please be assured that our commitment to excellence and your success remains unwavering. We are always eager to explore creative solutions that optimize both quality and value.

We kindly request that you carefully review the document and collaborate closely with your **designated Professional Services Representative at CLIENT. Their expertise and guidance will prove invaluable in helping you identify and assess the various options outlined within this** comprehensive Training Plan. By working together, we can tailor a training program that aligns precisely with your specific needs and objectives.

We sincerely appreciate your trust in us as we embark on this learning journey together. It is our genuine pleasure to guide you toward success with SOFTWARE.





2 Audience

The SOFTWARE User Training is specifically tailored for individuals new to our platform's current version.

Here is a suggested list of job titles at your organization that may benefit from participating in SOFTWARE Training:

- Access Control Officer
- Security Officer
- Facility Manager
- Security Systems Administrator
- Physical Security Specialist
- Access Control Supervisor
- Operations Manager
- Airport Security Coordinator
- Technology Integration Specialist
- Risk and Compliance Officer

| | First Name | Last Name | Login Name | Email | Status |
|--------------------------|-------------------------------|---------------|------------|------------------------|--------|
| <input type="checkbox"/> | SAFE | Policy | policy | | Active |
| <input type="checkbox"/> | System | Administrator | Admin | admin@hidglobal.com | Active |
| <input type="checkbox"/> | Organizational | Administrator | orgadmin | orgadmin@hidglobal.com | Active |
| <input type="checkbox"/> | Visitor Reception Desk | Officer | vmo | vmo@hidglobal.com | Active |
| <input type="checkbox"/> | Visitor Management | Supervisor | vms | vms@hidglobal.com | Active |
| <input type="checkbox"/> | Visitor Management Supervisor | PIV | pivvms | pivvms@hidglobal.com | Active |
| <input type="checkbox"/> | Enrollment | Supervisor | es | es@hidglobal.com | Active |
| <input type="checkbox"/> | Asset | Manager | assetmgr | amgr@hidglobal.com | Active |
| <input type="checkbox"/> | Policy | Manager | pm | pm@hidglobal.com | Active |
| <input type="checkbox"/> | Analytics | Manager | am | am@hidglobal.com | Active |

Showing 1-10 of 59 results



3 Training Format

To ensure a customized learning journey, we offer three distinctive options for you to choose from. You may opt for an instructor-led virtual training session or an instructor-led classroom training session. Each is designed to meet your specific needs. Please note that you may select only one method that best suits your preferences. Whichever format you choose, rest assured that comprehensive SOFTWARE Workflow documentation will be provided to all learners as a valuable resource for future reference.

3.1 Instructor Lead Virtual Training Session

Our virtual sessions via Microsoft Teams offer a productive and interactive learning experience supported by a well-structured agenda provided by CLIENT. To ensure smooth coordination, we kindly request scheduling the training at least one month in advance, allowing time to organize attendees and coordinate with the CLIENT Trainer.

These sessions accommodate up to 20 participants, fostering an inclusive environment. Attendees are encouraged to have access to the SOFTWARE system at their organization, facilitating hands-on learning alongside the instructor for practical skill application.

3.2 Instructor Lead In-Person Training Session

Our instructor-led in-person sessions offer flexibility in choosing your preferred organization's location. Please note that you are responsible for travel and accommodation for the CLIENT Training team. The duration of the training will vary based on the number of courses selected from our course list. CLIENT will communicate regarding the recommended number of training days required for your chosen courses. This ensures transparency and enables effective planning and scheduling for an optimal learning experience. To ensure smooth coordination, we kindly request scheduling the training at least one month in advance, allowing time to organize attendees and coordinate with the CLIENT Trainer.

We operate on a Train the Trainer model. Our in-person sessions accommodate up to 10 participants, ensuring focused interaction and understanding of SOFTWARE's functionalities. Learners actively engage with SOFTWARE in their organizational environment, guided by an experienced trainer for practical application and reinforced learning.

Please provide the specified materials outlined in Section 9 (Materials) for a comprehensive training experience.



4 Training Methodology

CLIENT understands the importance of providing a comprehensive learning experience, which is why we adopt a User Role based approach. Through this approach, we ensure that each user gains a deep understanding of all available features, empowering them to utilize the platform to its fullest potential.

Our instructor leads you through the SOFTWARE workflows, providing in-depth explanations of their purpose and function. We encourage learners to follow along with the SOFTWARE software to reinforce their understanding and skills. To ensure effective instruction, formative assessments are thoughtfully integrated, offering quick and valuable feedback to gauge your progress. Embrace project-based learning and gain practical, hands-on experience that enhances your proficiency in utilizing SOFTWARE.

Learners are encouraged to actively utilize SOFTWARE to create a comprehensive classroom portfolio throughout the course. This valuable resource will be readily available to them, serving as a tangible representation of their learning progress. By showcasing and reinforcing their achievements, learners can enhance their understanding and track their growth throughout the training journey.

| Role Name | Role Type | Level | Status |
|------------------------------|-----------|--------|--------|
| System Administrator | Global | Level1 | Active |
| Organizational Administrator | Global | Level2 | Active |
| Cloud Printing Officer | Global | Level2 | Active |
| Visitor Administrator | Global | Level2 | Active |
| Credential Administrator | Global | Level2 | Active |
| Asset Admin | Global | Level3 | Active |
| Badge Manager | Global | Level3 | Active |
| Authorized Administrators | Local | Level3 | Active |
| Location Administrators | Local | Level3 | Active |
| Employer Badge Manager | Local | Level3 | Active |



5 Curriculum

Our primary objective is to provide comprehensive training on User Roles, ensuring that you gain in-depth knowledge of their capabilities. Through interactive and hands-on sessions, learners will actively engage with the product, allowing for practical application and skill development. We offer a curated list of User Roles to choose from, enabling customization based on your specific needs and requirements. Our training program is designed to empower you with a comprehensive understanding of User Roles and equip you with the necessary skills to utilize them effectively.

5.1 Role List

| Role | Description |
|-----------------------------------|---|
| Adjudication Specialist | This role has access to review and evaluate an applicant's background check. |
| Asset Admin | This role is responsible for creating and managing location-based roles for Asset Manager, Master Data for Asset Management, and adding/modifying the asset types. |
| Asset Manager | This role is responsible for issuing assets/keys after the Area Owner's Approval, defining/creating assets, and Request Pools for the assigned locations. |
| Authorized Administrators | This role is responsible for all administrative tasks at an employer level, including managing employer end-user data, onboarding / off-boarding personnel, and managing contracts and tenant-specific assets such as mail templates & NDAs. |
| Badge Application Approver | This role is used to provide an optional pre-approval step for a badge application. Users in this group can approve or reject badge application approval tasks. |
| Badge Manager | This role is responsible for badging operations. Once a self-service user raises an access card request, the Badging Manager can issue the card and print badges from the Identities tab. This role can also Approve/Deny the Photo Upload request. |
| Credential Specialist | This role is responsible for post-Adjudication tasks of the Identity Life Cycle, including assignment of required training, physical accesses, and badging (once the identity has cleared the background check). |
| Employer Administrator | This role manages all employers within SOFTWARE, including onboarding employers, managing employer status, managing employer details, creating departments, and managing insurance, contracts, and privileges. This role differs from the Authorized Admin role, which is responsible for managing a specific employer. |



| | |
|--|---|
| Enrollment Specialist | This role has authenticated access to manage Identity Enrollment. This access includes gathering, recording, validating applicant identity, and submitting identity information for Background checks (CHRC/STA). May collect credential fees as required |
| Healthcare Admin | This role has access to view and configure patient privileges of all the patients and they will be able to add pre-approved/ denied visitors on behalf of the patients. |
| Healthcare Visitor Management Officer (Healthcare VMO) | This role validates and checks inpatient visits based on the patient's visitation policy. This role also performs business visitor validation and check-in. |
| Healthcare Visitor Management Supervisor (Healthcare VMS) | This role supervises all Healthcare VMO activity. The Healthcare VMS can override the Healthcare VMO's decisions and actions |
| Infraction Management Officer | This role will be responsible for creating Infractions of Employees or Employers. User/s in this role can add the citation or cancel the pending status citation. |
| Infraction Management Supervisor | This role will be responsible for managing the Infractions of Employees or Employers. User/s in this role can add/edit the citation and assign the action respective to the infraction. |
| Patient | A patient is the recipient of healthcare services. In CLIENT SOFTWARE, the patient is assigned a self-service account using which the patient can set his/ her visitation policies and add pre-approved visitors. |
| Security Operations | This role is responsible for suspending or deactivating an identity's access card in case of a security concern. |

6 Certification

We offer a specialized certification program exclusively dedicated to the Organizational Administrator Role. This role has access to all configurations of purchased modules in SOFTWARE. This comprehensive three-day class is designed to provide an in-depth exploration of every functionality associated with this critical role. Our instructor will guide you through, ensuring that you gain a thorough understanding of the Organizational Administrator Role and its diverse capabilities. By completing this program, you will be equipped with the knowledge and skills necessary to excel in fulfilling the responsibilities of an Organizational Administrator.



7 Training Schedule

To provide you with a clearer understanding of your learning journey, we have outlined our training schedule examples for your consideration. These schedules serve as a helpful resource to assist you in making an informed decision regarding the training method that best aligns with your specific needs and requirements.

7.1 Virtual Training Schedule

We have structured our virtual classroom model to accommodate your training needs. Up to four online training sessions are available from 7:00 AM to 6:00 PM CT, providing flexibility and convenience for learners across different time zones. Please review our sample schedule for this option below:

| Topic | Day | Attendees | Duration |
|---------------|---------|-----------|----------|
| Role 1 | Monday | 20 | 1 Hour |
| Role 2 | Monday | 20 | 1 Hour |
| Role 3 | Tuesday | 20 | 1 Hour |

7.2 In-Person Training Schedule

Our in-person training schedule provides a comprehensive outline of our time together. Our Role-based approach enables you to switch out attendees for different modules as needed. We are pleased to offer in-person training sessions from Monday to Friday between 9:00 AM and 5:00 PM in your respective time zone. The duration of the training days will vary depending on the number of Roles you wish to learn about. Our Professional Services Representative will work closely with you to determine the optimal number of training days.

| Topic | Time | Attendees | Duration |
|----------------------------|----------|-----------|------------|
| Introductions/Goals | 9:00 AM | 10 | 15 Minutes |
| Module 1 | 9:15 AM | 10 | 1.5 Hours |
| Break | 10:45 AM | | 10 Minutes |
| Module 2 | 11:00 AM | 10 | 45 Minutes |
| Lunch | 11:45 AM | | 1.25 Hours |
| Module 3 | 1:00 PM | 10 | 2 Hours |
| Break | 2:50 PM | | 10 Minutes |
| Module 4 | 3:00 PM | 10 | 1.5 Hours |
| Review | 4:30 PM | 10 | 30 Minutes |
| Finish | 5:00 PM | | |



8 Assessments

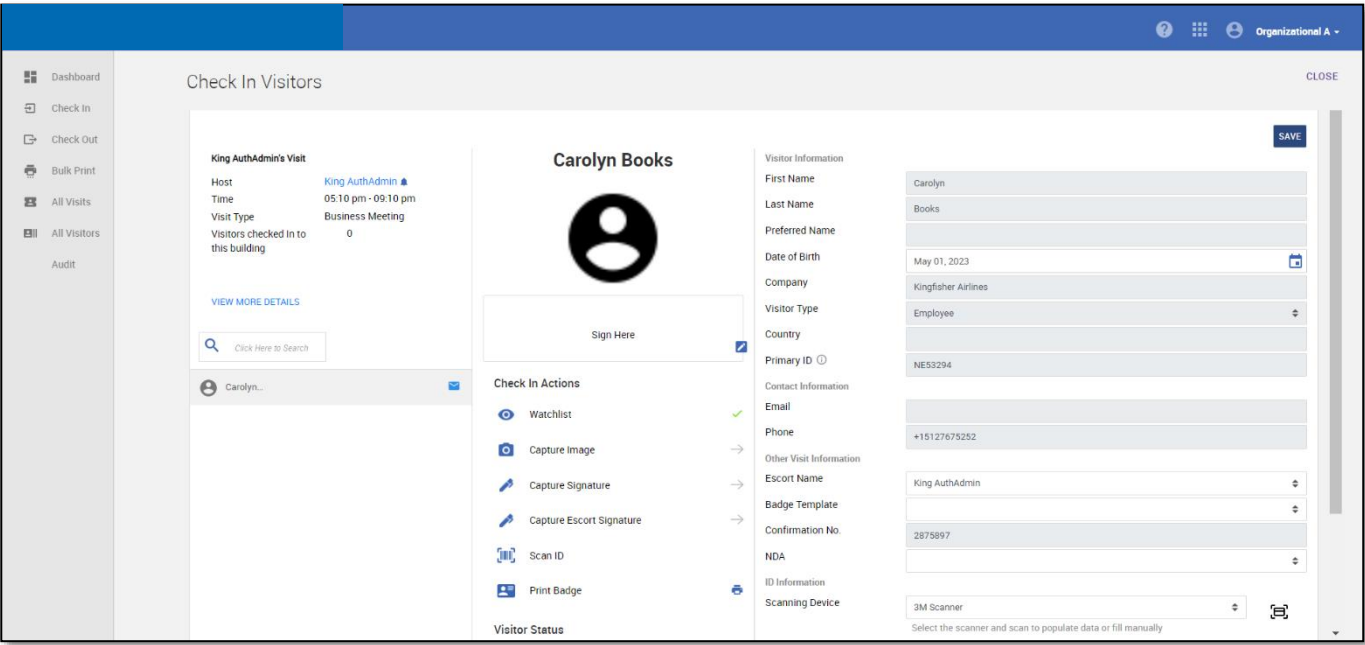
Our training program has the option to incorporate both formative and summative assessments to ensure a comprehensive understanding of the material. When we employ a combination of formative and summative assessments, we ensure that you receive a well-rounded evaluation of your progress.

8.1 Formative Assessments

Formative assessments are strategically placed throughout the course to gauge instructional traction and provide valuable feedback to our instructors. These assessments enable us to assess your progress and ensure that you are effectively acquiring the necessary knowledge.

8.2 Summative Assessment

In addition, our summative assessment takes the form of a performance evaluation, where you will actively demonstrate your skills and competencies by performing tasks and completing workflows within the SOFTWARE Software. This hands-on approach allows you to apply your knowledge in a practical setting, reinforcing your understanding and enhancing your proficiency.





9 Materials

This section outlines the minimum items required for an engaging training experience.

9.1 Location Requirements

| Item | Owner | Purpose | Training Method |
|---|--------|---|-----------------|
| Training Facility | Client | A room to host the training. | In-Person |
| Workstations | Client | Computers and stations for learners to work. | In-Person |
| Technology Connections and Peripherals | Client | Connections to projector screens. | In-Person |
| Refreshments | Client | Learner comfort. | In-Person |
| Training Resources | Client | Whiteboard, hand sanitizer, trash cans, dry-erase markers, and erasers. | In-Person |

9.2 Technology Requirements

| Item | Owner | Purpose | Training Method |
|------------------------------|---------------|---------------------|-------------------|
| Training Environments | CLIENT/Client | Practice Workflows | Virtual/In-person |
| System Logs | CLIENT/Client | Practice Workflows | Virtual/In-person |
| Practice Data | CLIENT/Client | Practice Workflows | Virtual/In-person |
| Laptop/Workstation | CLIENT/Client | Practice Workflows | Virtual/In-person |
| Internet/Power | CLIENT/Client | Connect to SOFTWARE | Virtual/In-person |

9.3 Administrative Requirements

| Item | Owner | Purpose | Training Method |
|-------------------------------|--------|-----------------------------------|-------------------|
| Workflow Documentation | CLIENT | Take-home materials for learners. | Virtual/In-person |



10 Customize Your Learning Experience

Use this form to create your customized learning experience. Select your preferred method of Delivery and content, then submit this form to your Professional Services Representative.

What Method of Delivery would you like for this training?

| Method | Days Billed | Selection |
|--------------------------|-------------|--------------------------|
| Instructor Led Virtual | 2 | <input type="checkbox"/> |
| Instructor Led In-Person | 5 | <input type="checkbox"/> |

What Roles would you like to learn about?

| Role | Days Billed | Selection |
|--|-------------|-------------------------------------|
| Adjudication Specialist | 2 | <input type="checkbox"/> |
| Asset Admin | 2 | <input type="checkbox"/> |
| Asset Manager | 2 | <input type="checkbox"/> |
| Authorized Administrators | 2 | <input type="checkbox"/> |
| Badge Application Approver | 2 | <input type="checkbox"/> |
| Badge Manager | 2 | <input type="checkbox"/> |
| Credential Specialist | 2 | <input type="checkbox"/> |
| Employer Administrator | 2 | <input type="checkbox"/> |
| Enrollment Specialist | 2 | <input type="checkbox"/> |
| Healthcare Admin | 2 | <input type="checkbox"/> |
| Healthcare Visitor Management Officer | 2 | <input type="checkbox"/> |
| Healthcare VMS | 2 | <input type="checkbox"/> |
| Infraction Management Officer | 2 | <input type="checkbox"/> |
| Infraction Management Supervisor | 2 | <input type="checkbox"/> |
| Organizational Administrator (Certification) | Paid | <input checked="" type="checkbox"/> |
| Patient | 2 | <input type="checkbox"/> |

What Assessment Method would you like for this training?

| Method | Days Billed | Selection |
|-----------|-------------|--------------------------|
| Formative | 1 | <input type="checkbox"/> |
| Summative | 1 | <input type="checkbox"/> |



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