


# Exact Americas Training

Training Guidelines and Helpful Hints



Thank you for your interest in Exact Americas Training. This document guides you through the processes and tools available, empowering you to gain the most from your Exact Americas Training investment.

## Registration

- All courses available for registration are displayed on the Exact Americas Training Start Page.
- Training Requests should be submitted at least 3 business days before the actual start date to ensure successful registration. Class registration is on a first-come, first-serve basis.
- Each course listed contains a direct registration link 
- Please make sure to complete all fields on the Training Request form before submitting.
- The actual person attending the training should be entered in the Contact field of your training request. Training information and courses instructions are sent to the contact person. Only individuals who are registered will receive a certificate of completion.
- Once you have submitted your training request, your instructor is notified directly.
- Please note:
  - Minimum and maximum attendance thresholds are exercised for each online course. Classes may be cancelled if 3 or fewer are registered, and classes may be closed or listed as full when the maximum attendance is met.
  - No more than 2 attendees from one company may attend one, allowing for multiple companies to take part in the training. Additional attendees are placed on a waiting list. Based upon capacity, attendees may be moved from the waiting list to active participation. Private classes are available through Exact's One-on-One training. Contact the training department for additional information.
- Contact Exact Software Sales to request a new login ID and password 1-800-468-0834 ext. 2603 (Macola) or 1800-777-4334 (JobBOSS)
- Published training prices are on a per-student basis (excluding Learning Pass customers).

## Confirmation Process

- You will receive an email confirmation for each training course approx. Two (2) business days prior to the actual start date.
- Each confirmation contains:
  - Class title, date and your instructor's name
  - WebEx hyperlink to join the training session
  - Teleconference number for audio (toll-free)
  - Training session password
  - Contact information if you need assistance
- Confirmations are intended for use by registered participants only, and should not be forwarded or shared.
- If you are registering for training on the same day it is scheduled, please contact Kathleen O'Neil for assistance 800-468-0834 extension 6980 or email [Kathleen.Oneil@exact.com](mailto:Kathleen.Oneil@exact.com)

## Joining and Participating

- Click [here](#) to test your browser and operating system (first time users).
- Join each training session approx. 10-15 minutes prior to the designated start time.
- Your instructor will make every effort to start the training session promptly at the designated time.
- Attendance is verified by your instructor periodically during each session. Please acknowledge your attendance when asked.

- You are expected to participate during each training session to include:
  - Completing assigned exercises as verified by your instructor.
  - Responding to direct or indirect questions.
  - Responding to polls and chat text inquiries.

Note: You may be asked to contact Technical Support for assistance if you are unable to successfully join the training session within a reasonable amount of time.

### Helpful Hints

- Upon logging into the Customer Portal please go to "Settings" on the left hand tool bar and change the date format to American English, mm/dd/yyyy. This will ensure that you receive the class information on the correct date.
- If the correct contact does not appear in the drop down list, please enter the contact on the account card.
- To view the courses the contacts at your company have attended:
  - Go to your account card from the customer portal
  - Click on Workflow
  - Select the appropriate request type:
    - For Globe, Macola, or Exact Synergy Enterprise, Select Type = Customer Training
    - For JobBOSS:, Select Type = Training Registration
  - The results populate in the window

### Training Completion and CPE Credits

- An online Training [Evaluation](#)\* should be submitted by each registered participant to receive a Certificate of Completion. If you are unable to complete the evaluation, please contact Kathleen O'Neil for assistance 800-468-0834 extension 6980.
- [Evaluations must be received within 1 month of the original course date to be valid.](#)
- After you have successfully completed a training course, you will receive a Certificate of Completion via email automatically, usually within 5-10 business days.
- Designated training courses provide Continuing Professional Education (CPE) credits, which are included with your Certificate of Completion.
- CPE credits are based on 1 credit per 60 minutes of delivered instruction.
- Only registered training participants who complete an online evaluation form are eligible to receive a Certificate of Completion.

### Cancellations

Notifying Exact Americas Training of a cancellation is required. This enables other Exact Software customers to attend the training, especially if the class has limited registration levels. This also ensures that you receive credit toward a future training course, if applicable. Failure to notify Exact Software of non-attendance (no show) may result in forfeiture of the training fee.

Please refer the Exact Software [Payment and Cancellation Policy](#) for specific guidelines.

**\*Adobe Flash Player is required to submit training evaluations.** If you are unable to submit the evaluation, download Adobe Flash Player when prompted or go to <http://www.adobe.com/products/flashplayer/>

After downloading Flash Player, close your Internet Explorer browser.

- Log in to the Exact America Customer Portal.

- Go to the Training Start Page.
- Launch the Training Evaluation. You should be able to submit the evaluation.

Please contact your IT manager regarding Adobe Flash Player if you are unable to download due to network restrictions.