



CrossCheck Travel Enterprise

Virtual Classroom Learning Program

Jan 07

What is Virtual Classroom Learning (VCL)?

VCL is a real-time, instructor-led event, in which all participants are logged on to the Internet at the same time and communicate directly with each other.

This approach will ensure all agency staff can participate and learn without the need to travel to a Galileo training venue.

All you require is a phone and a workstation that has access to the internet.

It is highly recommended that you use a phone and workstation with internet access located in either your back office, or a workstation that is furthest away from the agency front door for privacy.

You can even do this from another location, including your home.

Multiple staff can learn from the one connection where your phone system has a loud speaker/hands free capability.

CCT Enterprise Sessions

Client Management

3 sessions

Client Management Multi-branch - Optional

2 sessions

Account Management

5 sessions

Duration: Approx. 1 hour per session

Please note: Each session will only be conducted within business hours- Mon-Fri between 9am & 4pm EST.

These sessions are free with the exception of telecommunication costs, which require the participant to call their closest major city to join the training.

Local numbers are provided for: Sydney/Melbourne/Brisbane/Adelaide/Canberra/Perth

Client Management Session Pre-requisites

Prior to attending the Client Management sessions, all attendees have:

Completed a 3 day CrossCheck Travel 3.0 Client Management course

or

Minimum 2 months CCT 3.0 usage on a daily basis including the creation of:

- Trip and Client files
- Links between Trip and Client files
- Segments, Quotes and Fees
- Accounting transactions
- Trip file documentation

Client Management sessions overview

The Client Management sessions consist of 5 x one hour interactive sessions:

Client Management

Mandatory for all staff that will be using CCT Enterprise

Session 1-3 Outlines all new CCT Enterprise functionality

These sessions can be scheduled individually as 3 x 1 hr sessions or together as 1 x 3 hr session

Client Management Multi Branch

Optional and only required for those staff that will have access to more than 1 branch.

Sessions 1-2 Looks at the multi-branching aspects of CCT Enterprise.

It is highly recommended all consultants are given access to ONLY their home branch at time of installation until the user is proficient in using CCT Enterprise and before introducing read and/or write access to other branches.

These sessions can be scheduled individually as 2 x 1 hr sessions or together as 1 x 2 hr session and it is recommended these are conducted after installation.

Objectives - Client Management - Session 1

By the end of this session you will be able to:

Identify the changes to the login and password functionality

Use the following new My CCT features:

- > New Trip Search fields
- > Create My Files
- > Create My Files subfolders
- > Use the My Files Mailing functionality
- > Delete My Files folders

Complete the new Trip and Segment tab fields

Objectives - Client Management - Session 2

By the end of this session you will be able to:

- > View and delete items under the **Document** tab
- > View the **Overview** tab
- > Create a **Duplicate** Trip file
- > Create an Itinerary with a **Narrative**

Objectives - Client Management - Session 3

By the end of this session you will be able to create the following new transaction types:

- > NRC - BSP Nett Remit CCCF
- > NRR - Refund BSP Nett Remit CCCF
- > CRC - Refund Creditor Payment

Objectives - Client Management Multi Branch Session 1

By the end of this session you will:

Understand the basics of Multi-branching by using the Set Home button

Be able to select branches in the following My CCT areas:

- > Trip and Client Search fields
- > My Files
- > Action Items

Objectives - Client Management Multi Branch - Session 2

By the end of this session you will understand :

Basic Multi-branching including:

- > Using the Set Home key before uploading a Client file
- > Selecting a Branch at the Download prompt

The importance of correct Branch selection in creating Trip file transactions

Account Management Session Pre-requisites

Prior to attending the Account Management sessions, all attendees have:

Completed a 2 day CrossCheck Travel 3.0 Account Management course

or

Minimum 2 months CCT 3.0 back office functionality experience including:

- Security Settings
- Bank Reconciliation
- General Ledger Accounts

Account Management sessions overview

The Account Management sessions consist of 5 x one hour interactive sessions:

These sessions can be scheduled individually as 5 x 1 hr sessions or together as 1 x 5 hr session

Session 1: Branch Structure, Supervisor Branch and Set Up tabs

Session 2: Security and Document tabs; Tables

Session 3: Debtor and Creditor introduction

Session 4: Creditor transactions

Session 5: Cashbook and Reports

Objectives - Account Management - Session 1

By the end of this session you will be able to:

- > View different user group access rights and their Branch settings
- > Be aware of the new fields on the Branch tab
- > Move from Branch to Set-up sections in Supervisor CCT
- > Create new Consultant records selecting Branch access levels
- > Identify new Trip fields in the Mandatory Trip tab
- > Access full branch records from the Access Overview tab

Objectives - Account Management - Session 2

By the end of this session you will be able to:

Adjust settings for the new CCT Enterprise items:

- > Within the Security tab
- > Within the Documents tab, including adding Prefix and Suffix text

Review the new CCT Enterprise entries in the following Tables:

- > Codes
- > Supplier
- > Bank Accounts
- > Service Types
- > Narratives

Objectives - Account Management - Session 3

Complete the following functions in a Debtor file:

- > Receipt and Allocation for a branch
- > Identify and change Branch access
- > Match Receipt and Allocation Branches
- > Unallocated

Complete the following functions in a Creditor file:

- > Creditor Search
- > Select payment options on the Creditor tab
- > De-activate a Creditor

Objectives - Account Management - Session 4

By the end of this session you will be able to:

Complete Creditor Payments using:

- > Individual Creditor Approval and Payments
- > Bulk Pay
- > Cyclical Payment

Process BSP electronically including the Exceptions reports

Objectives - Account Management - Session 5

By the end of this session you will be able to complete the following functions in the Cashbook:

- > Identify Branch bank accounts
- > Identify Branches in MyCCT Cashbook folders
- > Complete a new transaction selecting the required Branch
- > Complete a Deposit selecting the Branch
- > Complete a Statement selecting the Branch
- > Recognise the importance of Branch selection in reports

Objectives - Account Management - Session 5 con't

By the end of this session you will be able to complete any of the following Reports selecting a branch:

Menu bar reports:

- > Trip
- > Client
- > Debtor
- > Creditor
- > Cashbook
- > Bank Reconciliation
- > Sales
- > Other Listing Reports

MyCCT Reports

Enquiries

Schedule your CCT 5 Virtual Classroom Learning by contacting your Galileo Account Executive.

We hope you enjoy your Galileo Learning experience.

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About Virtual Training

Galileo uses “WebEx” to conduct online training, a small program is required to be loaded on each workstation used for virtual training.

Details on how to install this program will be provided prior to the schedule start time on the training.

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