

Training Description

The purpose of this ten-day training session is to introduce Mercury functionality related to profile information, collecting and processing applications, taking contracts and payments, room/plan assignments & management, accounting, and reporting.

Attendees

This training is designed for key housing staff who are the primary administrative users; staff responsible for such departmental areas as assignments, accounting, applications, and cancellations. IT staff are encouraged to attend. Additional staff members who are deemed appropriate may attend as well. We recommend a maximum of 5-12 people participate in this training. Front desk and student staff such as receptionist, RAs, desk staff, etc. should not attend this training.

Week 1 - Day 1

Time	Topic	Details
9:00-9:30	Introduction	Introduction
9:30-10:30	Overview	Mercury Overview and Glossary of Terms(Set-up) Where do things come from – basic set-up <ul style="list-style-type: none"> • Accounting • Profile • Custom Fields
10:30-10:45	Break	
10:45-12:00	Overview	Mercury Overview, Continued <ul style="list-style-type: none"> • Applications • Contracts • Correspondence <ul style="list-style-type: none"> ○ Senders and Signatures ○ Saved Emails and SMS ○ Correspondence History
12:00-1:15	Lunch	
1:15-3:00	Overview	Mercury Overview, Continued <ul style="list-style-type: none"> • Living Area • Inspections • Filters • Lookup Lists
3:15-3:30	Break	
3:30-5:00	Mercury Navigation	Search Options including Advanced Selection and Filtering. Sticky Lists

Week 1 - Day 2

Time	Topic	Details
9:00-9:30	Introduction to Templates	Template Functionality Examples of Usage Staff vs Student-facing templates
9:30-10:15	Build a Profile Template	Template Data Wizard Parts of a template General Components Person Components Process Summary
10:15-10:30	Break	
10:30-12:00	Build a Profile Template	Build a Profile Template, Continued
12:00-1:15	Lunch	
1:15-3:00	Contracts	Build a Contract <ul style="list-style-type: none"> • Signature Policy • Manage Contracts • Generated Contracts • Advanced Uses for Contracts
3:00-3:15	Break	
3:15-5:00	Profile and Applications	Person and Application Custom Fields Person History Flags File Attachments

Week 1 - Day 3

Time	Topic	Details
9:00-10:30	Application Process	Application Periods Mercury Application Examples Build an Application Template <ul style="list-style-type: none"> • Room Preferences and Room Lists • Plan Preferences • Named Roommate Groups • Roommate Matching Process Summary
10:30-10:45	Break	
10:45-12:00	Contracts and Payments	Contract Use and Required Contract Step Payments: <ul style="list-style-type: none"> • Web Payment Items • Payment Component • Payment Results
12:00-1:15	Lunch	
1:15-3:00	Finish/Cancel Processing/Display	Cancel Processing Redirecting

	Settings	Conditional Emails – using the editor/context data Custom Processing Workflow Display Settings
3:00-3:15	Break	
3:15-5:00	Template Building	Template Building

Week 1 - Day 4

Time	Topic	Details
9:00-10:30	Template Availability	Template Availability Options Filters Flags No Access Processing
10:30-10:45	Break	
10:45-12:00	Application and Profile Management	View Application Batch Correspondence Application and Profile Batch Update Cancel and Delete Application
12:00-1:15	Lunch	
1:15-2:00	Waitlist	Waitlist Management
2:00-3:00	Design Tools	Manage Styles Default Styles Labels Message Display Fonts
3:00-3:15	Break	
3:15-5:00	Practice	Template Building and Business Process Discussion

Week 1 - Day 5

Time	Topic	Details
9:00-10:30	Reporting	Easy Report Builder Report List Manage Reports Dashboard Reports Component Easy Report Building Practice
10:30-10:45	Break	
10:45-12:00	Reporting	Reporting Continued
12:00-1:15	Lunch	
1:15-3:15	User Access	Users Roles Permissions Securables

		Positions Page Mapping and Login Components
3:15-3:30	Break	
3:30-5:00	Business Process and Template Building	Create a to-do list based on Business Process needs (templates, reports, filters)

Week 2 - Day 1

Time	Topic	Details
9:00-9:15	Introduction	Recap week 1 What we are covering this week, where are they located
9:15-10:30	Overview for Week 2	Assignment Options Intellassign Self-Assign Templates (student and staff) Retention vs Roommate Pull-in vs GRS Demo the templates for each Living Area Maps and Suite Management Bed Space and Plan Management Accounting Reporting
10:30-10:45	Break	
10:45-12:00	Overview for Week 2 Continued	Assignment Options Intellassign Self-Assign Templates (student and staff) Retention vs Roommate Pull-in vs GRS Demo the templates for each Living Area Maps and Suite Management Bed Space and Plan Management Accounting Reporting
12:00-1:15	Lunch	
1:15-2:00	Bed Space and Plan List Management	Nominated Bed Space Lists Nominated Plan Lists
2:00-3:15	Self Assignment	Retention Template Template Data Wizard Components Details Booking Term Selection Retention Room Lock Status (intro)
3:15-3:30	Break	
3:30-5:00	Self Assignment	Roommate Pull-in Template Template Data Wizard Components Details Room Booking Selection Roommate Group Roommate Pull-In

		Filters Roommate PIN (template example)
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Week 2 - Day 2

Time	Topic	Details
9:00-10:30	Self Assignment	Living Area Mapping and Management Bed Space Config List Impact of Room Configs, etc on what shows up in template
10:30-10:45	Break	
10:45-12:00	Self Assignment	General Room Selection Template Template Data Wizard Component Details Room Selection Room Lock (detailed) Roommate Group (detailed)
12:00-1:15	Lunch	
1:15-2:15	Self Assignment	General Room Selection Template Cont'd Plan Selection Template Data Wizard Component Details Plan Selection Plan Lists
2:15-3:15	Sort Order and Scheduling	Create Sort Order Schedules
3:15-3:30	Break	
3:30-4:30	Bed Space Change and Plan Change	Room Change Template Room Booking Selection Room Change Plan Change Template Plan Booking Selection Plan Change
4:30-5:00	Self Assignment with Date Selection	Booking Date Selection Example (Early Arrival or Late Stay) Template Data Wizard Component Details Booking Date Selection

Week 2 - Day 3

Time	Topic	Details
9:00-10:15	Intellassign	Setup Passes Room and Plan Lists Strategies Happiness Score Use of Filters to determine student selection Examples of when to use Intellassign
10:15-10:30	Break	
10:30-12:00	Intellassign Continued	Setup Passes Room and Plan Lists Strategies Happiness Score Use of Filters to determine student selection Examples of when to use Intellassign
12:00-1:15	Lunch	
1:15-3:00	Room and Plan Management	Delete Booking Relationship to Applications Create Break Change Rates Change Rooms Change Dates Check-In and Check-Out Bed Space Closures Plan Management
3:00-3:15	Break	
3:15-5:00	Room and Plan Management Continued	Delete Booking Relationship to Applications Create Break Change Rates Change Rooms Change Dates Check-In and Check-Out Bed Space Closures Plan Management

Week 2 - Day 4

Time	Topic	Details
9:00-10:15	Inspections, Check-In and Check-Out	Inspections Inspections Set-up (Ratings, fields, definitions) Create Inspections Batch Update Inspections Edit Inspections Inspections on Templates Check-In and Check-Out Templates
10:15-10:30	Break	
10:30-11:30	Inspections, Check-In and Check-Out	Inspections Inspections Set-up (Ratings, fields, definitions) Create Inspections Batch Update Inspections Edit Inspections Inspections on Templates Check-In and Check-Out Templates
11:30-12:00	Maintenance	Maintenance
12:00-1:15	Lunch	
1:15-3:00	Accounting	Fee Assessment Recommended business practices Charges and Credits Statement Report Ledger Rate Calculator
3:00-3:15	Break	
3:15-5:00	Accounting	Payments and Results Apply Credits to AR Liabilities/Liability Refund AR Refunds Invoices Transfers Related Reports End of Day Management

Week 2 - Day 5

Time	Topic	Details
9:00-10:15	Reporting	Easy Report Builder Telerik Reporting Needs
10:15-10:30	Break	
10:30-12:00	Introduction to Customization	Configurable Operations Dynamic Lists Home Menu
12:00-1:15	Lunch	
1:15-3:15	Business Process	Update to-do list based on Business Process needs (templates,

	Discussion and Template Building	reports, filters)
3:15-4:00	Final Review and Wrap Up	