Open eLearning Courses 2024

eLearning Course

Open eLearning Sessions

Our CPD accredited Open eLearning courses are one day online intensive training sessions, designed to help get your new starters up and running with ProVal or Sequel, or as a refresher for those already using the system and wanting to familiarise themselves with newer versions of the software.

The day is limited to 4 learners to ensure interactive training and lots of opportunities for question & answer sessions to allow full participation between the audience and the presenter as well as short assessments to assess knowledge. From creating appraisals, managing projects, forecasting and balancing the cashflow through to reporting, these sessions will help equip your staff with the sufficient level needed to use the software.

Open eLearning is public and open to any SDS customer. Dates will be on the website and updated regularly. For those of you not up for sharing these courses, you can purchase your own personal client branded session just for your team members.

Not up for sharing these courses with others? Don't worry as you can purchase your own personal client branded session just for your team members.

Please email : sheila.mccluskeycarroll@s-d-s.co.uk for further information.

End User:

ProVal eLearning one day	**Overview**	**Cost** **£400 + VAT**
Getting started with ProVal	**The Getting Started module is designed to help new starters get up and running with ProVal or provide a refresher for established users. From a system overview to creating a new Appraisal with the Wizard, this session will help equip you with the basics.** **ProVal Overview** – What is ProVal – Development Viability - The tale of the combined cashflow. **Logging in and checking settings** – Navigating folders and appraisals **Creating a new Appraisal** - Using the Appraisal Wizard to create a quick appraisal from templates.	
Updating your costs and mandatory fields	**This session is designed to help users add and update their Units and Capital Costs through the development process.** **Start Page:** Adding data - Editing Milestones - Setting the information	

	Adding Units - Key mandatory attributes - Sales and Staircasing - Rent and Rent Allowances - Commercial Units **Capital Costs** - Adding the Acquisition - Works - Fees and Other Costs	
Interpreting your results	**Are you looking for certain results and don't know where to start? This session is ideal to help understand your results.** **Subsidy and Private Finance** - Does the project need Subsidising either by Grant funding or internal Financing in order to achieve the right results? **Development Cashflow** - How the Forecasting of the spend on the Project can affect the TSC and interest calculations. Using the various spread methods to predict spend - Curves - Percentages - Manual **Appraisal Results** - Interpreting the results in the scheme - what is the NPV - IRR - Interest - Long Term Cashflow forecast	
Running and understanding reports	**This session allows the User to run reports and consolidated appraisals as well as review Sensitivities to see how these affect the appraisal outcomes.** **Sensitivity** - running Sensitivity scenarios - Checking Affordability - Looking at Residual Land Values **Reports** -Creating Summary Reports - Reviewing analytics and revenue data in ProVal **Consolidations** - Creating Consolidations - Consolidated Appraisals-and Consolidation Reports	

Sequel eLearning one day	**Overview**	**Cost** **£400 + VAT**
Getting started with Sequel	**The Getting Started module is designed to help new starters get up and running with Sequel or provide a refresher for established users. From a system overview to creating and updating Notes, this session will help equip you with the basics.** **Sequel Overview** – What is Sequel – Overview of Sequel Project **Logging in and checking settings** – Navigating Projects - Searching for Projects and information and using the filter tools.	

	Notes - Adding Notes - Links to documents - Office Add In- Searching Notes	
Project creation and importing your appraisal	**This session is designed to help users to create their Projects in Sequel and import appraisals** **Creating a new Project** - Adding the Project Name - Editing Attributes - Setting the Summary panel. **Cashflow Creation -** Importing Appraisals using the Import Wizard - Creating individual tenure Cashflows and Multi-tenure Cashflows - Matching Appraisal Budgets to Sequel Account Codes	
Forecasting and balancing the cashflow	**Are you looking to balance your Cashflows and don't know where to start or simply in need of a Forecasting refresher? This session is ideal for those who are new to Cashflows and will help you to gain the most out of your Forecasting.** **Cashflow Settings -** Naming Cashflows - Setting interest rates - Adding and removing Account Codes **Cashflow Manager** - Using the Cashflow Tools - Viewing Transactions - Setting Retention Payments - Editing Cell Comments **Balancing and Forecasting** - Using the Spread Tools to re-forecast the Cashflows - Updating Latest Estimate Totals - Using the Vire Tool	
Managing properties and re3ports	**This session is designed to help users to collate information they receive regarding the individual units as they are built, and report on all information that has been tracked and recorded in the Projects.** **Properties** - Importing Property information - Updating Unit information - Exporting to Housing Management Systems **Cashflow updates** - Importing Sales figures into the Cashflow **Reports** - Running and filtering Reports - Analysing results	
People & Workflows **** Available on request ****	**This session is designed to help users to manage the people involved in the Project. Whether it be from an order they have placed with the contractors or supplier to how the consultants are performing. Users will also learn how to manage their Project tasks to ensure all activities are completed on time and provide a full audit**	**£400 +Vat**

	trail. **Managing the Contractors -** Updating Contractor KPI's - Adding orders - Communicating with people working on the Projects **Workflows -** Adding tasks - Amending Task timings - Updating and completing Tasks - Sending notifications and linking documents.	
Advanced Project Management **** On request ****	**This session is designed to help users to manage the Projects from Manually creating Cashflows to track initial spend on schemes to re-importing appraisals to update Cashflow Budgets and Forecasts.** **Cashflow Creation -** Manually creating a Cashflow, setting Budgets and Latest Estimates **Appraisal Updates -** Reimporting Appraisals to update Budgets and Forecasts and consolidate multi-phase projects. Creating Outturn Appraisals.	**£250 + VAT**

Administration

ProVal eLearning one day	**Overview**	**Cost** **£400.00**
Intro to ProVal Administration	**This session is designed to help new administrators get up and running with ProVal.** **Development Viability** - What is ProVal? - The Cashflow **Overview of ProVal** - Demonstration walkthrough of an appraisal and the Project Folder Structure **Critical Admin Functions** - Setting up organisations - License Manager and Creating New Users - Adding Product Types, Subsidy and editing Local Authorities	
Creating Templates	**This session is designed to enable Administrators to enter their standard assumptions into their Default templates.** **Appraisal Setup -** Starting a new template - Selecting the correct Loan method and rates - Default Milestones - Security Permissions **Capital Costs -** Setting up standard assumptions for Acquisition, Works, Fees and Other **Development Cashflow -** Setting Interest Rates - Using	

	Development Forecast tools to balance cashflows **Inflation** - Setting base rates and margins for Income and Allowances.	
Unit Library Defaults	**In this session Administrators will learn how to create a Library of Units for users to select when creating appraisals.** **Creating New Units -** Selecting product Types - Adding NPV rates and Discount Periods - Setting Sales and Staircasing defaults **Allowances -** Setting defaults for Management, Maintenance, Service Costs, Voids and Bad Debts and Major Repairs **Rent -** Calculating Rents - calculating Service Charges	
Administration Settings	**This session is designed to look at the Administration side of ProVal where Organisational Parameters can be set.** **User Defined Questions and Curves -** Adding any bespoke questions to the Appraisal - creating new curves to balance cashflows **Investment Criteria -** Setting organisational requirements for hurdle rates such as Loan repaid year and NPV/IRR values. **Sensitivity -** Creating Scenarios for Users to test against appraisal in order to show how variances in the scheme might affect the results.	

Sequel eLearning one day	**Overview**	**Cost** **£400 + VAT**
Intro to Sequel Administration	**This session is designed to help new administrators get up and running with Sequel.** **Overview of a Sequel** - Demonstration walkthrough of a Project, Start Screen and Layout **Global Properties** - How to access Global Properties - Overview of Functionality and settings **Managing Reports** - Overview of Standard Reports - Running and filtering reports - Defaulting Filters and adapting reports	

Organisation settings and Users	**This session is designed to look at the Administration side of Sequel where Organisational Parameters and User levels can be set.** **Organisations** - Finance settings - Managing and assigning Licenses and updating Server information **Managing Projects** - Setting Project Summaries - Deleting, Deactivating and Closing Projects **Maintaining Users** - Creating new Users - Setting Project Filters - Determining Security Level access	
Creating and updating Attributes	**In this session Administrators will learn how to create, update and manage the Attributes found within the Project pages** **Attributes** - Creating headings and different field types - Security levels for editing and viewing - Compulsory and optional settings **Timesheets** - Creating a list of Categories for the Time Sheet function in the main Project page **Project Ownership** - Using the Global Properties settings to transfer projects between users.	
Cashflow Account Codes	**This session is designed to ensure that the system is able to import upto date transactions from your Finance Systems into Sequel in order to manage your live cashflows in your Projects.** **Account Codes** - Creating or importing Account codes - setting code Type and Categories - Adding Tolerance levels to affect traffic light notifications - Mapping Codes from Appraisals to Sequel **Cashflow Transactions** - Transaction file types - Importing/removing Transactions - Filtering Cashflows - Successful and Failed Transactions	
Creating Workflows **** on request **** **Half Day**	**In this session Administrators will learn how to create, update and manage workflows.** **Overview of Workflows** - How workflows can be used - Setting up of Categories, Events, Links and Notifications **Tasks** - Creating and editing Tasks - Adding Task Timings - Inputting Help tips and Sign off Levels **Templates** - Adding/removing Tasks from Templates - Setting Sequencing and Dependencies.	**£250 + VAT**
People and	**This session is designed to help Administrators manage the people and organisations involved in the**	**£250 + VAT**

Organisations **** on request **** **Half day**	**Project.** **Organisations** - Creating Category Lists - Inputting Organisational Information - Exposure Limits and risk values - Linking Account Codes and Orders **People** - Adding Job titles - Creating Contacts and Linking them to organisations - Updating Attributes for monitoring performance and KPI's	

NB: Workflow admin & People admin can be combined into one full day - £400 + VAT

For more information email : sheila.mccluskeycarroll@s-d-s.co.uk