



**ONEADVANCED LEGAL PORTFOLIO**

## **Blended Learning Information Pack**

Empowering you to build your system knowledge,  
anywhere, anytime and at a pace that suits you.

**OneAdvanced Customer Training & Education**  
February 2025



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A full list of its trading subsidiaries is available at [www.oneadvanced.com/privacy-policy](http://www.oneadvanced.com/privacy-policy).

# Training Services

OneAdvanced provides a comprehensive training curriculum, delivered by a team of professionals dedicated to providing a complete training service. Our Training Services team have extensive hands-on experience and have an exceptional ability to relate courses to real life situations, showing you how to utilise your software to best effect.

## Blended Learning Approach

Our blended learning experience utilises learning paths combining self-paced digital learning; virtual classroom sessions with one of our trainers/consultants, supported by comprehensive workbooks and in-product learning guides.



### Why we provide blended learning:

- Provides a standard approach, with learning aims and objectives ensuring all delegates are trained on the fundamentals of the product.
- Hands-on, metric driven training to ensure that the correct level of knowledge is shared, retained and tracked.
- Using multiple learning methods (eLearning, virtual classroom and in-product learning) dramatically reinforces engagement, empowerment and retention.

## eLearning

Where relevant, module overview eLearning is available to learners for the contract duration providing the opportunity to see and understand the basics of the system.

The modules are built using software recordings, interactive screens, and knowledge checks, providing a fully interactive learning experience.

At the end of each module, learners will need to complete an evaluation of learning. This will ensure that they have gained the information necessary to use the system efficiently.

Our eLearning and training courses are CPD accredited providing our learners to earn CPD hours/points towards their continuing professional development.



## Virtual Classroom

Our CPD Accredited training sessions provide an efficient, easy to access learning experience. The sessions are fully interactive, supported by a course workbook containing worked examples and scenarios for learners to complete.

Customers will also receive high-quality, user-friendly course materials, to ensure even after the session has finished, attendees remain completely confident that they have all the information they need.

We restrict the number of delegates to 6 to maintain the interactive nature of our training courses. This approach allows us to present worked examples and guide delegates through the process effectively. It also enables the trainer or consultant to closely observe and assist delegates during exercises.

Additionally, this ensures delegates gain the maximum benefit from the training. This number is generally sufficient to support organisations of your calibre. If more training is required, additional days or value credits can be purchased.

## In-Product Learning

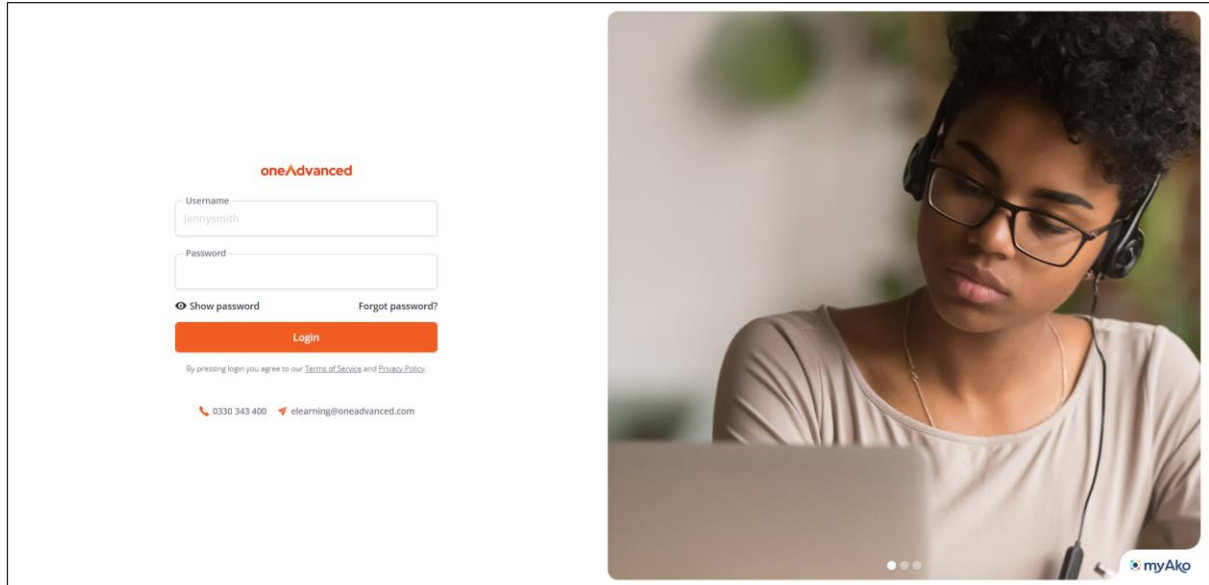
Continuing the learning journey past eLearning and any virtually delivered content for our users is important to really embed all the benefits of their software from OneAdvanced.

Embedded in many of our products users will have access to In-Product learning which will allow users to search on specific keywords or processes to display supporting documentation, and where applicable provide a step-by-step guide to perform that function.



## Accessing your eLearning Modules and Learning Paths

The eLearning content can be accessed via an internet browser, iOS or Google App using a smart phone or tablet, meaning that users can access the content via the eLearning Portal any time and in any location. Our content is either within a single module of learning or within a Learning Path, which is a combination of multiple modules.



Our learning paths are associated to two different scenarios – topic based, such as Reporting or into a Persona scenario of a Day-to-Day user for example. Due to the complexity of some topics, you may find that you must complete learning in a specific order (a pre-requisite), where the next module and or modules within a learning path will only become available once all pre-requisite learning has been completed.



## Scenario Training Pre-Requisites

In readiness for the training session(s), please ensure that you / your delegates have completed the following preparatory steps:

- Run the compatibility test for your virtual classroom session, please click on the following link [Remote Access Test Page](#) selecting **Amsterdam on the drop down for Data Centre** (this will also be sent along with joining instructions nearer the time of the session) Contact your IT department if it is not fully successful. Failure to check your IT compatibility before the training may result in you being unable to participate
- Ensure that training is undertaken in a dedicated training room away from the **normal** work environment if attending from offices, or a quiet location if attending from home
- Internet access is required, and a headset is preferable, we also encourage our attendees to utilise the camera when engaging in virtual classroom sessions
- It is recommended to have access to two screens when attending a remote virtual training session. This setup allows you to watch the trainer on one screen while completing exercises on the other. Additionally, you may wish to print the course workbook in advance of your session

Delegates must have completed the pre-requisite eLearning as detailed on the course overview or, be familiar users of OneAdvanced Legal Accounts prior to attending the virtual classroom session.



We regret to inform you that we are unable to record workshops and training sessions. This decision is based on the potential risk of recordings being shared outside the intended audience, which could lead to the exposure of personal identifiable information (PII) and violate GDPR regulations.

Our primary concern is the safety and privacy of our customers and employees. Recording a Teams meeting captures all attendees' names and email addresses, including those of our trainers and consultants

Furthermore, these sessions are designed to be interactive, featuring real-time Q&A and hands-on activities. Recording them could diminish the value of this interactivity, as future viewers would not be able to engage in the same way.

By not allowing recordings, we ensure compliance with all relevant laws and regulations and maintain the integrity and confidentiality of the information shared.



# Learning Path Overviews

These learning paths offer a comprehensive introduction to the OneAdvanced Legal Portfolio. The table below displays the learning paths for each stage of the onboarding process, aligned with specific personas:

- Super Users
- Practice & Case Management: Core Users (PCMS Core)
- Practice & Case Management: Administration Users (PCMS Admin)
- Practice & Case Management: Conveyancing Users
- Accounts Core Users
- Accounts Administration Users

Please note that the above learning personas can be assigned to new users of the portfolio software post implementation.

## Onboarding Learning Path Requirements (eLearning)

All users are required to have completed the following required learning paths. This will enable a smooth onboarding and knowledge of the products within the portfolio.

Onboarding Learning Paths	Personas				
	Super User	PCMS Core	PCMS Admin	Accounts Core	Accounts Admin
Introduction & Navigation	✓	✓	✓	✓	✓
Practice & Case Management: Core Users	✓	✓	✓	✗	✗
Practice & Case Management: Admin Users	✓	✗	✓	✗	✗
Practice & Case Management: Conveyancing Users*	✓	✓	✓	✗	✗
Accounts Daily Activities*	✓	✗	✗	✓	✓
Account Administration	✓	✗	✗	✗	✓
Estimated Hours Required	7.5	1.5	2	4	6.5
CPD Accreditation on Completion	✓	✓	✓	✓	✓

\* Available for Plus and Pro Subscription Customers. Estimated Hours Required will increase by approximately 1 hour.

\* All delegates for the Accounts Postings and Routines Course **must** complete this Learning Path in full, prior to attending.

## Essential Learning Path Requirements (Blended learning)

These are essential learning paths that should be completed by users as soon as possible, to embed and gain an in-depth introduction to the processes each persona will utilise regularly.

Essential Learning Paths	Personas				
	Super User	PCMS Core	PCMS Admin	Accounts Core	Accounts Admin
Fee Earner & Support Staff	✓	✓	✓	✓	✗
Accounts Purchase Ledger	✓	✗	✗	✓	✓
Accounts Monthly Activities*	✓	✗	✗	✓	✓
BTP: Setup, Imports & Submissions (UK Only)	✓	✗	✗	✗	✓
Legal Forms: End User & Administration Activities	✓	✓	✓	✗	✗
Estimated Hours Required	6	3	3	2.5	2.5
CPD Accreditation on Completion	✓	✓	✓	✓	✓

\* All delegates for the Accounts Postings and Routines Course **must** complete this Learning Path in full, prior to attending.

Accounts Virtual Classroom	Personas				
	Super User	PCMS Core	PCMS Admin	Accounts Core	Accounts Admin
Accounts Postings and Routines**	✗	✗	✗	✓	✓
Estimated Hours Required	N/A	N/A	N/A	1 day	1 day

\* \* The OneAdvanced Legal eLearning paths 'Accounts Daily Activities' and 'Accounts Monthly Activities' are **pre-requisites** for attending this one day 'virtual classroom' course.

## Supplementary Learning Paths (eLearning)

Whilst these are not mandatory, these learning paths are highly recommended for the following users to complete to master additional elements within the system. The modules in these learning paths can be completed in any order.

Some of the modules may not be required to be completed. For this reason, these paths are **not CPD accredited**.

Supplementary Learning Paths	Personas				
	Super User	PCMS Core	PCMS Admin	Accounts Core	Accounts Admin
Practice & Case Management Supplementary Learning	✓	✓	✓	✗	✗
Document Management	✓	✓	✓	✗	✗
Estimated Hours Required	3	3	3	N/A	N/A
CPD Accreditation on Completion	✗	✗	✗	N/A	N/A

# OneAdvanced Legal: Introduction & Navigation

**Personas: All**



This eLearning module is **essential** for all users of the system and is imperative that it must be completed **first** as part of their onboarding journey.

In completing this learning path, users will be able to:

## **INTRODUCTION & NAVIGATION**

- Navigate the solution and organise the homepage
- Perform client and matter searches and view the associated records

# OneAdvanced Legal: Practice and Case Management: Core Users

**Personas: PCMS Core Users, PCMS Admin Users, Super Users**



This learning path consists of two **essential** modules which will offer vital knowledge to enhance a user's knowledge of the system. These must be completed to embed knowledge during **onboarding**.

In completing this learning path, end users will be able to:

## **CLIENT & MATTER CREATION**

- Create and open clients and matters
- Perform conflict checks
- Log client identification
- Carry out anti-money laundering risk assessments
- Add private and legal aid matters

## **CONTACT MANAGEMENT**

- Distinguish between the different types of contact
- Create new general and service contacts
- Locate and modify existing contact records
- Choose which contact to assign to a matter

# OneAdvanced Legal: Practice and Case Management: Administration Users

**Personas: PCMS Admin, Super Users**



This learning path consists of three **required** modules, which will enable administrators and/or users with the relevant permissions to efficiently manage and optimise user and client data.

These must be completed to embed knowledge during **onboarding**.

In completing this learning path, end users will be able to:

## **NEW USER CREATION**

- Create new users/fee earners and set-up private charge rates
- Apply permissions and assign licences

## **DATA CLEANUP TOOL**

- Search for and identify duplicate records and analyse the results
- Use the Data Cleanup tool



# OneAdvanced Legal: Practice and Case Management: Conveyancing Users

Personas: PCMS Core, PCMS Admin, Super Users



This learning path consists of two modules, **essential** for Conveyancing customers with a **Plus or Pro subscription**. They will give an overview of the system, its functionality and settings. These must be completed to embed knowledge during **onboarding**.

In completing this learning path, end users will be able to:

## CONVEYANCING WORKFLOW MODULE: ADMIN AND SETUP

- Add conveyancing licences to user accounts
- Configure and maintain the module settings

## CONVEYANCING WORKFLOW MODULE: NAVIGATING AND USING THE MODULE

- Add and amend conveyancing within a matter
- Add relevant contacts, property details and any related transaction finance information.



# OneAdvanced Legal: Accounts Daily Activities

**Personas: Accounts Core, Accounts Admin, Super User**



This learning path consists of seven **essential** modules, which will enable accounts users to create, view, manage and produce reports on various transactions in your organisation. These must be completed to embed knowledge during **onboarding**.

In completing this learning path, end users will be able to:

## **BATCHES**

- Manage batches, from creation to export
- View transactions in a posting batch
- Switch off batches

## **CLIENT AND DEPOSIT ACCOUNT POSTINGS**

- Access, post and complete transactions that relate to the client and deposit account

## **OFFICE ACCOUNT POSTINGS**

- Create new general and service contacts and assign them to a matter
- Locate and modify existing contact records

## **NOMINAL POSTINGS**

- Access and post nominal bank payments/receipts, petty cash, batch journals, accruals and nominal to nominal transfers
- Claim back VAT and fuel scale charge

## **ACCOUNTS/NOMINAL ENQUIRY**

- Reverse transactions and nominal transactions
- Carry out actions on transactions, such as to reallocate profit splits or amend time entries

**ALLOCATION POSTINGS**

- Work efficiently with relevant ledgers for bills and disbursements
- Allocate bills, credit notes, payments and disbursements, and provide reports on their statuses

**ANTICIPATED POSTINGS**

- Recognise the different types of anticipated postings and action them correctly
- Post, bill, pay and cancel billing disbursements

# OneAdvanced Legal: Account Administration

**Personas: Accounts Admin, Super User**



This learning path consists of five **essential** modules, which will enable account administrators to manage options for system settings within the Utilities section of the OneAdvanced Legal software. These must be completed to embed knowledge during **onboarding**.

In completing this learning path, end users will be able to:

## **CORE PMS (UTILITIES)**

- Create and maintain bank accounts, branches, departments and work types

## **ACCOUNTS (UTILITIES)**

- Create and maintain clearance types, disbursements, narratives and nominals
- Add VAT Rates

## **TIME RECORDING (UTILITIES)**

- Discover the different areas in the system where time can be recorded and the benefits of each one
- Create time entries, including for non-chargeable and unallocated time
- Manage their time sheets and produce attendance notes

## **FIRM OPTIONS (UTILITIES)**

- Manage anti-money laundering
- Create and maintain business sources and titles
- Set up storage locations

## **SYSTEM PARAMETERS (UTILITIES)**

- Alter different parameters in the system, such as bill numbering type and minimum interest value

# OneAdvanced Legal: Fee Earners & Support Staff

**Personas: PCMS Core, PCMS Admin, Super User, Accounts Core**



These eLearning modules will equip Users with **essential** skills for managing accounts and billing, including using the Accounts Enquiry screen, creating and authorising Client and Office Accounts Requests, utilising Time Recording features, and handling draft bill requests.

These modules are **vital** for users to complete for them to continue to **embed their knowledge** of the software.

In completing this learning path, end users will be able to:

## **ACCOUNTS ENQUIRY**

- Use the Accounts Enquiry screen to run standard reports

## **ACCOUNTS REQUESTS**

- Create client or office payment and receipt requests
- Authorise requests to be processed and view their progress

## **TIME RECORDING**

- Know where in the system to record time
- Create time entries, review time sheets and produce attendance notes

## **DRAFT BILLING**

- Create draft bills to be processed by the accounts team, and view its progress before production the final bill

# OneAdvanced Legal: Accounts Purchase Ledger

**Personas: Accounts Core, Accounts Admin, Super User**



These eLearning modules will explore the **essential** skills required for using the Purchase Ledger for purchasing and invoicing tasks. These modules are **vital** for users to complete for them to continue to **embed their knowledge** of the software.

**Please note:** This learning path only needs to be completed if your organisation is utilising the Purchase Ledger elements of the software.

In completing this learning path, end users will be able to:

## **PURCHASE LEDGER ESSENTIALS**

- Set up default apportionments, and add or search for information about a supplier in the Purchase Ledger

## **PURCHASE LEDGER INVOICES AND PAYMENTS**

- Add invoices and apportion them correctly
- Action transactions, including to amend/post payments and generate auto payments



# OneAdvanced Legal: Accounts Monthly Activities

**Personas: Accounts Core, Accounts Admin, Super User**



The three eLearning modules within this learning path will assist users to complete bank reconciliations, and perform month end, VAT quarter and year end procedures.

Users will explore tools that will support accounting processes, such as to calculate interest on client funds and to carry out audits on transactions.

These modules are **vital** for users to complete to **embed their knowledge** of the software.

In completing this learning path, end users will be able to:

## **BANK RECONCILIATION**

- Manage various account processes, such as to process outstanding adjustments
- Run reports and clear down bank accounts

## **MONTH END / YEAR END / VAT**

- Run reports and complete month end and year end procedures
- Perform VAT returns and close the VAT quarter

## **ACCOUNTS TOOLS**

- Calculate interest earned on client accounts, using the Client Interest Calculator
- Use accounts system tools to perform useful processes, such as change matter information in bulk, action stagnant client funds or audit transactions

# OneAdvanced Legal: Accounts Postings and Routines (Virtual Classroom)

**Personas: Accounts Core, Accounts Admin, Super User**



This open course will enable you to discover how to with guided hands-on experience work through practical examples of everyday accounts postings and some common routines.

Attendees should be those responsible for the day-to-day account's activities for your organisation.

In attending this virtual classroom course users will be able to:

- Create and use Batches
- Find, create and work with Client & Office Postings
- Use Nominal Postings
- Transfer Postings
- Review of the Bank Reconciliation processes
- Work with the VAT Enquiry tool



This is an **open course**, available for any of our OneAdvanced Legal customers to book and attend. This course is designed to provide comprehensive training and support, ensuring that our customers can fully benefit from the features and functionalities.

Before attending, please ensure you have completed the 'Accounts Daily Activities' and 'Accounts Monthly Activities' eLearning paths and you have completed the [Scenario Training Pre-Requisites](#) preparatory steps.



# Business Tax Portal: Setup, Imports & Submissions (UK only)

**Personas: Accounts Admin, Super User**



These eLearning modules will enable users to setup and configure the Business Tax Portal. Users will also discover how to complete imports and adjustments to VAT returns and submit them to HMRC.

These modules are **vital** for users to complete for them to continue to **embed their knowledge** of the software.

**Please note:** This learning path only needs to be completed if your organisation is an organisation registered in the United Kingdom.

In completing this learning path, end users will be able to:

## **GETTING STARTED**

- Set up the Business Tax Portal and explore its capabilities

## **CONFIGURATION & ADMIN**

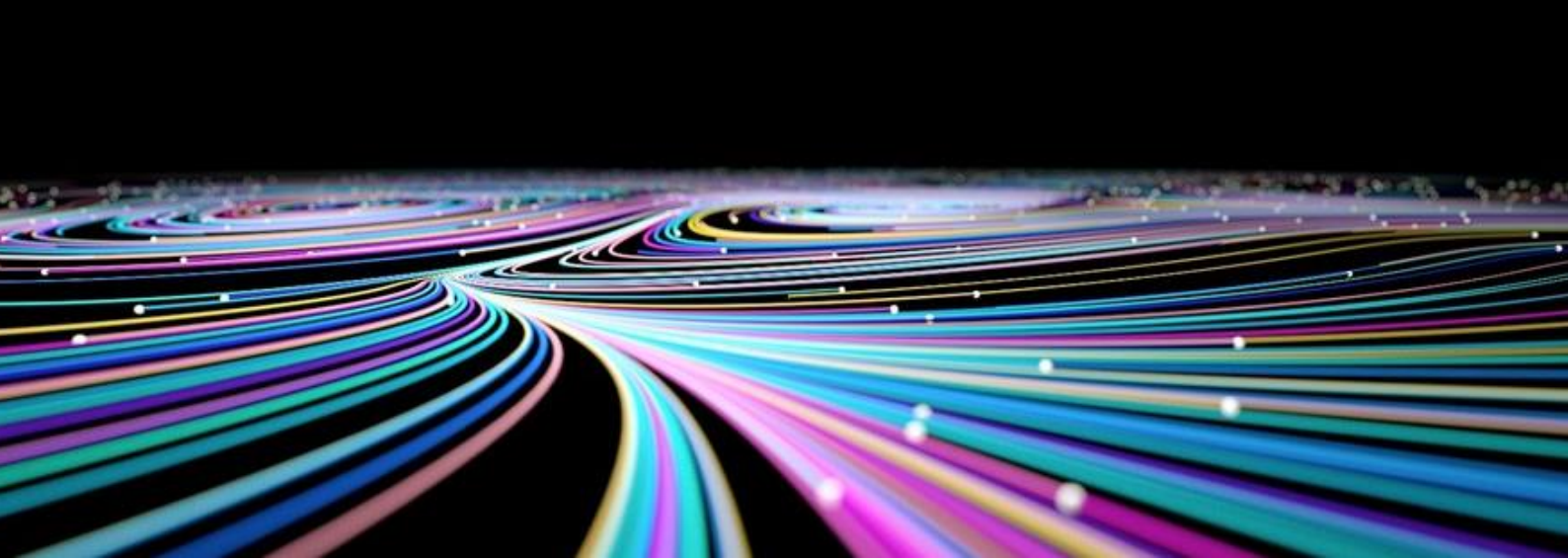
- Set up FMS connections
- Create and maintain users

## **IMPORTS, ADJUSTMENTS & SUBMISSION**

- Import and view CSV files
- Correcting any import errors
- Submit a VAT return

# Legal Forms: End User & Administration Activities

Personas: PCMS Core, PCMS Admin, Super User



These eLearning modules aim to help users explore the Forms Library, use the Hub to submit forms to agencies like HMRC, and handle any related rejections or requisitions. Users will learn to create and work with the IHT400 form and manage system users and configurations.

These modules are **vital** for users to complete for them to continue to **embed their knowledge** of the software.

In completing this learning path, end users will be able to:

## LIBRARY

- Create and save new forms; edit, clone, and share existing forms

## HUB

- Create and submit forms, handle rejections, and share, clone, and view legal forms

## IHT400 WORKFLOW

- Produce the IHT400 form, attach the right schedules, and download the final version as a PDF

## ADMINISTRATOR

- Maintain practice and user details, profiles and permissions
- Configure system settings
- Run reports

# Practice & Case Management: Supplementary Learning

**Personas: PCMS Core, PCMS Admin, Super User**



The eLearning modules within this learning path aim to support users to master additional elements within the system. They will demonstrate the Archiving, Diary tool, and the Wills and Deeds functionality available in the product.

These learning paths are **optional**, with free navigation around the modules for users to dip in and out as they prefer. They are not part to CPD accreditation.

In completing this learning path, end users will be able to:

## ARCHIVING

- Configure system settings and identify ways to mark a matter for archiving
- Archive, resurrect and edit archived information

## DIARY

- Choose diary views, create appointments and tasks and produce diary reports

## WILLS AND DEEDS

- Set up Wills and Deeds records
- Store, search for and remove Wills and Deeds records
- Produce reports

## NATIONAL WILL REGISTER

- Discover the purpose of the National Will Register
- Set up, register with and initiate or action searches of the National Will Register database

# OneAdvanced Legal: Document Management

Personas: PCMS Core, PCMS Admin, Super User



The eLearning modules within this learning path are to enable system users to create and manage document templates for other end users in the organisation.

These learning paths are **optional**, with free navigation around the modules for users to dip in and out as they prefer. They are not part to CPD accreditation.

In completing this learning path, end users will be able to:

## **PRACTICE & CASE MANAGEMENT: DOCUMENT MANAGEMENT**

- Produce and save correspondence within a Matter
- Use and Save a Legal Form
- Manage saved documents in the Matter Document History

## **PRACTICE & CASE MANAGEMENT: DOCUMENT TEMPLATE PRODUCTION**

- Create letters, header templates and form templates
- Use the basic features of the Field Code Selector tool

## **DOCUMENT PRODUCTION: BASIC TEMPLATE CREATION**

- Configure Word to use and adapt the built-in templates in the product
- Generate Quick Letter
- Use filters and review template codes



**Please note:** We recommend that users accessing this learning path have a good working knowledge of Practice & Case Management and Microsoft Word.



# OneAdvanced Legal Training CPD Accreditation

Many of these OneAdvanced Learning Paths are accredited by the CPD Standards Office for delivery, structure, and content.

## What is CPD?

CPD stands for Continuing Professional Development and is the term used to describe the learning activities Professionals engage in to develop and enhance their abilities. The CPD Certification Service was established in 1996 and is the world's leading and largest independent CPD accreditation institution operating across all industry sectors.

The CPD Certification Service provides support, advice and recognised CPD accreditation for the Continuing Professional Development obligations and policies of Professional bodies and Academic Institutes.



## Certification Process

On completion of an Accredited Learning Path, you will have the option to request your CPD certificate as proof of completion (example below) for you to claim your hours or points direct from CPD.

### OFFICIAL CPD CERTIFICATE & LEARNING REFLECTION TOOL

This certificate verifies that

*Delegate Name*

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Has completed the CPD Standards Office accredited activity:

**Product: Course Title**

Delivered by:

**ADVANCED BUSINESS SOFTWARE AND SOLUTIONS LTD**

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CPD Standards Office Provider Number: 22510

Signed: *D. King* Date:      (DD/MM/YY)

Dianne King, Head of Training & Education



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