



ONEADVANCED LEGAL

Blended Learning Information Pack

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

OneAdvanced Training & Education
May 2024



Contents

Disclaimer	3
Training Services	4
Blended Learning Approach	4
eLearning.....	5
Virtual Classroom	5
Accessing your eLearning Modules and Learning Paths	6
Learning Paths & Course Summaries	7
Practice & Case Management: Digital Learning.....	10
Practice & Case Management: Workshop	19
Legal Accounts: Digital Learning.....	20
Accounts Legal: Training.....	24
Business Tax Portal: Digital Learning	25
Legal Forms: Digital Learning.....	26
System Administration: Digital Learning	29
OneAdvanced Legal Training CPD Accreditation.....	37
What is CPD?.....	37
Certification Process.....	37

Disclaimer

Copyright © OneAdvanced 2024.

This document contains confidential and / or proprietary information. The content must not be disclosed to third parties without the prior written approval of Advanced Computer Software Group Limited or one of its subsidiaries as appropriate (each referred to as "OneAdvanced"). External recipients may only use the information contained in this document for the purposes of evaluation of the information and entering into discussions with OneAdvanced and for no other purpose.

Whilst OneAdvanced endeavours to ensure that the information in this document is correct and has been prepared in good faith, the information is subject to change and no representation or warranty is given as to the accuracy or completeness of the information. OneAdvanced does not accept any responsibility or liability for errors or omissions or any liability arising out of its use by external recipients or other third parties.

No information set out or referred to in this document shall form the basis of any contract with an external recipient. Any external recipient requiring the provision of software and/or services shall be required to enter into an agreement with OneAdvanced detailing the terms applicable to the supply of such software and/or services and acknowledging that it has not relied on or been induced to enter into such an agreement by any representation or warranty, save as expressly set out in such agreement.

The software (if any) described in this document is supplied under licence and may be used or copied only in accordance with the terms of such a licence. Issue of this document does not entitle an external recipient to access or use the software described or to be granted such a licence.

The development of OneAdvanced software is continuous and the published information may not reflect the current status. Any particular release of the software may not contain all of the facilities described in this document and / or may contain facilities not described in this document.

Advanced Computer Software Group Limited is a company registered in England and Wales with registration number 05965280 whose registered office is at The Mailbox Level 3, 101 Wharfside Street, Birmingham, B1 1RF.

A full list of its trading subsidiaries is available at 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

Blended learning is not necessarily a new method of training; however, technology has enabled us to adapt existing learning programs from the traditional methods into this more adaptable approach.

Our blended learning experience utilises learning paths combining self-paced digital learning; virtual classroom sessions with one of our trainers, supported by comprehensive training guides.



Why we provide blended learning:

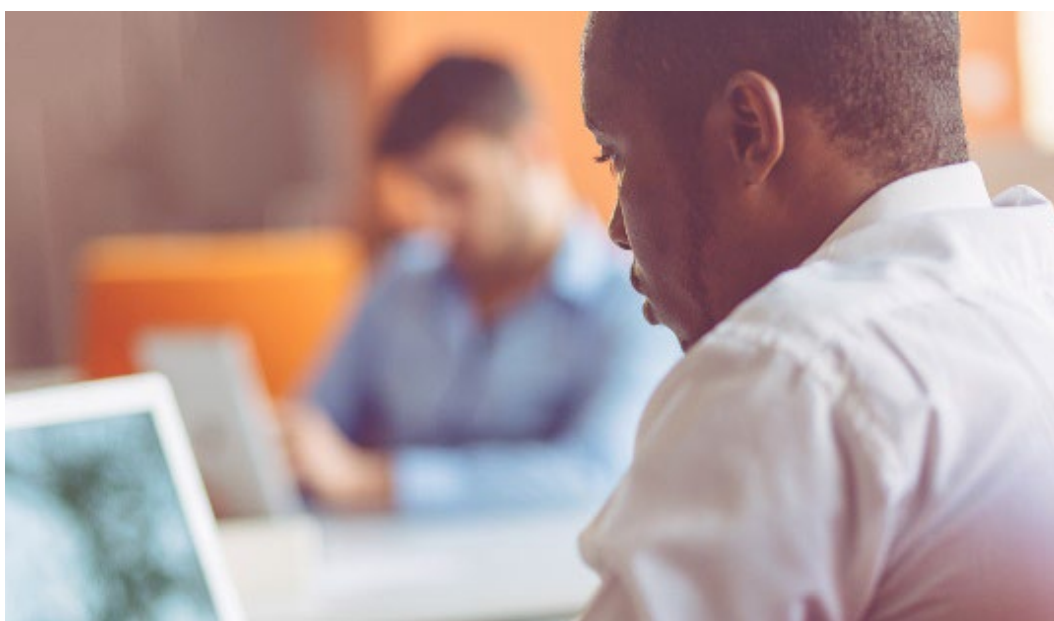
- Different people learn different things in different ways
- Using multiple modalities dramatically reinforces engagement, learning and retention
- Learners can control the pace of their learning
- Blended learning is more cost effective
- Blended learning is modular and scalable, allowing users to receive training focused on their business needs

eLearning

Our modules are built using software recordings, interactive screens, and knowledge checks, providing a fully interactive learning experience. All sessions have associated audio which will auto-play when the course is started.

Our modules are accompanied by Closed Captions, where appropriate. In addition, there is also a Dyslexia filter which can be applied to ensure that the learning is truly accessible.

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. Learners can also access the eLearning as many times as they like for the duration of the contract.



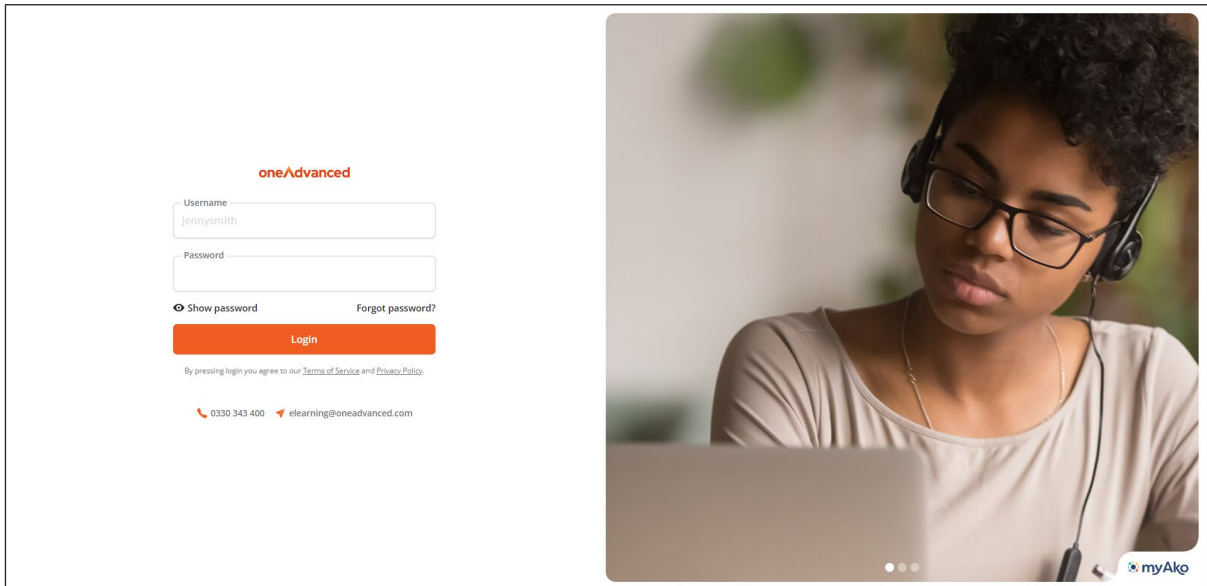
Virtual Classroom

OneAdvanced Virtual Classroom sessions provides an efficient, easy to access and cost-effective learning experience delivered straight to your desk. The sessions are fully interactive with worked examples and exercises for you to complete.

Not only will you be working with our knowledgeable, friendly, expert trainers you will also receive high-quality, user-friendly materials. These include pre and post course documentation that ensure even after the session has finished, you'll remain completely confident that you have all the information you need.

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 have to 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.

Learning Paths & Course Summaries

Practice & Case Management Training – This blended learning path provides an in-depth introduction to Practice & Case Management, taking users through the day-to-day processes. From creating and updating client and matter details, to performing time recording activities. This course is suitable for users who will be using Practice & Case Management on a regular basis, such as Fee Earners and Administrators.

Module Title	Duration	Delivery Method
Introduction and Navigation	20 minutes	eLearning
Client & Matter Creation	20 minutes	eLearning
Contact Management	20 minutes	eLearning
Document Management	20 minutes	eLearning
Diary	20 minutes	eLearning
Time Recording	20 minutes	eLearning
Wills and Deeds	20 minutes	eLearning
Integration with National Will Register	20 minutes	eLearning
Case Workshop	0.5 Day	Virtual Classroom

Legal Accounts Training – This blended learning path provides an in-depth introduction to Legal Accounts, taking users through the day-to-day accounting processes. From making accounts requests and enquiries to performing month end / year end activities. This course is suitable for users who will be using Legal Accounts on a regular basis.

Module Title	Duration	Delivery Method
Accounts Requests	20 minutes	eLearning
Accounts Enquiry	20 minutes	eLearning
Draft Billing	20 minutes	eLearning
Month End / Year End	20 minutes	eLearning
Accounts Course	1 Day	Virtual Classroom

Business Tax Portal Digital Learning– This learning path provides comprehensive guide to Business Tax Portal, taking users through the configuration and setup of the software, plus how to create a VAT return to HMRC. This course is suitable for users in your organisation who are responsible for this regular return activity.

Module Title	Duration
Imports, Adjustments & Submission	20 minutes

Legal Forms Digital Learning – This learning path provides a guide to the application, for both digital submissions and the comprehensive library of legal forms, which can also be output to PDF. This course is suitable for users in your organisation who are responsible for these submissions and the management of the form library.

Module Title	Duration
Library	20 minutes
Hub	20 minutes
IHT400 Workflow	20 minutes

System Administration Digital Learning – This learning path provides an in-depth guide to administering the different areas of the OneAdvanced Legal Portfolio.

Module Title	Duration
Practice & Case Management: New User Creation	20 minutes
Practice & Case Management: Data Cleanup Tool	20 minutes
Practice & Case Management: Archiving	20 minutes
Document Production – Basic Template Creation	20 minutes
Practice & Case Management: Document Template Production	30 minutes
Practice & Case Management: Office Add-Ins	20 minutes
Business Tax Portal: Getting Started	20 minutes
Business Tax Portal: Configuration & Administration	20 minutes
Legal Forms: Administration	20 minutes

Practice & Case Management: Digital Learning

Introduction and Navigation



This eLearning module is for all users of the system. We will show you how to navigate and interact with your solution.

In completing this eLearning module, end users will be able to:

- Discover how to navigate the solution.
- Perform Client searches and view Client records.
- Perform Matter searches and view Matter records.
- Explore how to organise your Homepage.

Client & Matter Creation



This eLearning module will enable new and existing users to create Clients and Matters. The module covers the essentials of creating new clients and opening new matters. This includes logging client identification and matter risk assessment as well as performing conflict checks.

In completing this eLearning module end users will be able to:

- Use the Conflict Checker.
- Create individual, multiple and organisation Clients.
- Attach ID for Anti Money Laundering purposes.
- Add private and legal aid matters.
- Perform Anti Money Laundering risk assessment.

Contact Management



This eLearning module will enable new and existing users to create General Contacts, Services and Service Contacts, view and update contact details and assign them to a Matter.

In completing this eLearning module end users will be able to:

- 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.

Document Management



This eLearning module will enable new and existing users to create General Contacts, Services and Service Contacts, view and update contact details and assign them to a Matter.

In completing this eLearning module end users will be able to:

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

Document Production: Basic Template Creation



This eLearning module is for enable new and existing users, where we will explore how to use the built-in Microsoft Word templates as a starting point, then adapt them to create your own customised collection of templates.

In completing this eLearning module end users will be able to:

- Create your own customised templates.
- Create new letters from a base template.
- Manage document templates.
- Add new template category types.
- Add and edit Association Roles.

Diary



This eLearning module will enable users to schedule appointments, create tasks such as key dates and limitation dates within the diary and assign them to a Client / Matter.

In completing this eLearning module end users will be able to:

- Navigate around the diary and its different views.
- Create new appointments and tasks.
- Produce Diary Reports.

Time Recording

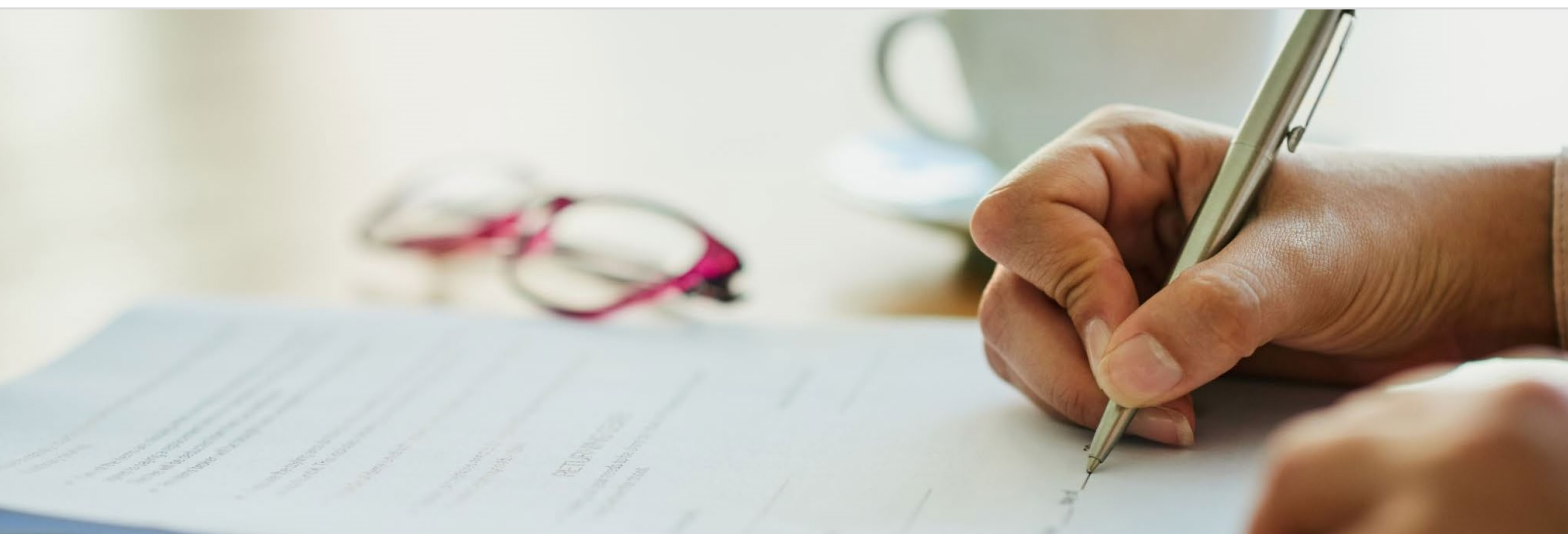


This eLearning module will enable new and existing users to discover how Time Recording works in the system. This includes adding time entries from both the timesheet and the matter.

In completing this eLearning module end users will be able to:

- Recognise the different areas in which to record time.
- Review and manage your Time Sheet.
- Create Non-Chargeable and Unallocated time entries.
- Produce and Attendance note.

Wills & Deeds

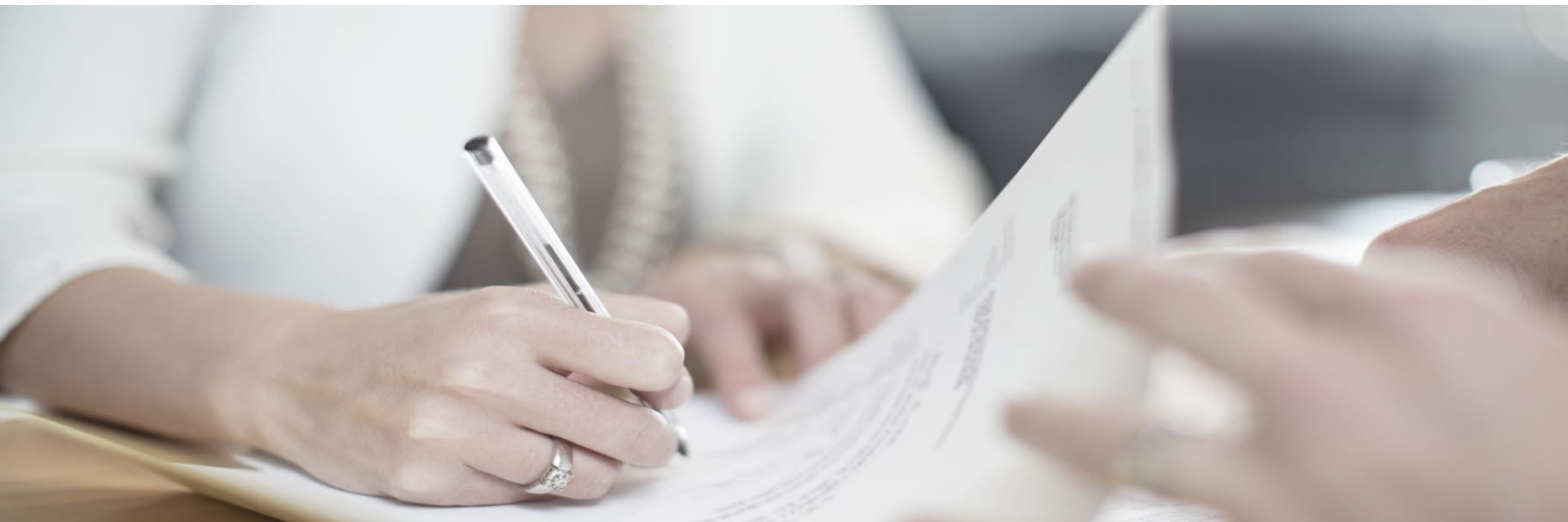


This eLearning module will enable users to record Wills and Deeds on behalf of their Clients and keep track of Clients' documents as they circulate internally and externally.

In completing this eLearning module end users will be able to:

- Setup Wills and Deeds records.
- Modify storage locations and file removals.
- Use searches to locate the Will or Deed record.
- Produce reports.

Integration with National Will Register



This eLearning module will enable users to discover how Practice & Case Management integrates with the National Will Register for will registrations and searches.

In completing this eLearning module end users will be able to:

- Register Wills through Practice Case Management with the National Will Register.
- Initiate searches of the National Will Register database.
- Setup and action National Will Register searches from a Probate Agenda.

Practice & Case Management: Workshop



This workshop will enable you to discuss the firm's set up and processes, to ascertain the firm's objectives and provide guidance on how best to move forward with using the new system.

Attendees should be those responsible for the firm's system setup and Case/Document Management operations.

In attending this workshop users will complete:

- Fact finding discussion around the firms list of topics following completion of the eLearning modules.
- Ad Hoc consultancy – Getting started with Practice & Case Management
- Discuss and agree the firms next actions.

Pre-requisites

We recommend that each person taking part in this course should have access to a PC/Laptop.

The workshop where possible should take place away from the usual working environment to ensure minimum disruption and maximum focus.

Delegates should have completed the eLearning modules prior to attending this workshop and should attend with a list of topics which require further discussion.

Legal Accounts: Digital Learning

Accounts Requests



This eLearning module will enable you to create and authorise Client and Office Accounts Requests.

In completing this eLearning module end users will be able to:

- Create Client or Office Payment and Receipt Requests.
- Select and authorise Requests to send to the Accounts department for processing.
- Locate and view the progress of the Request.

Accounts Enquiry

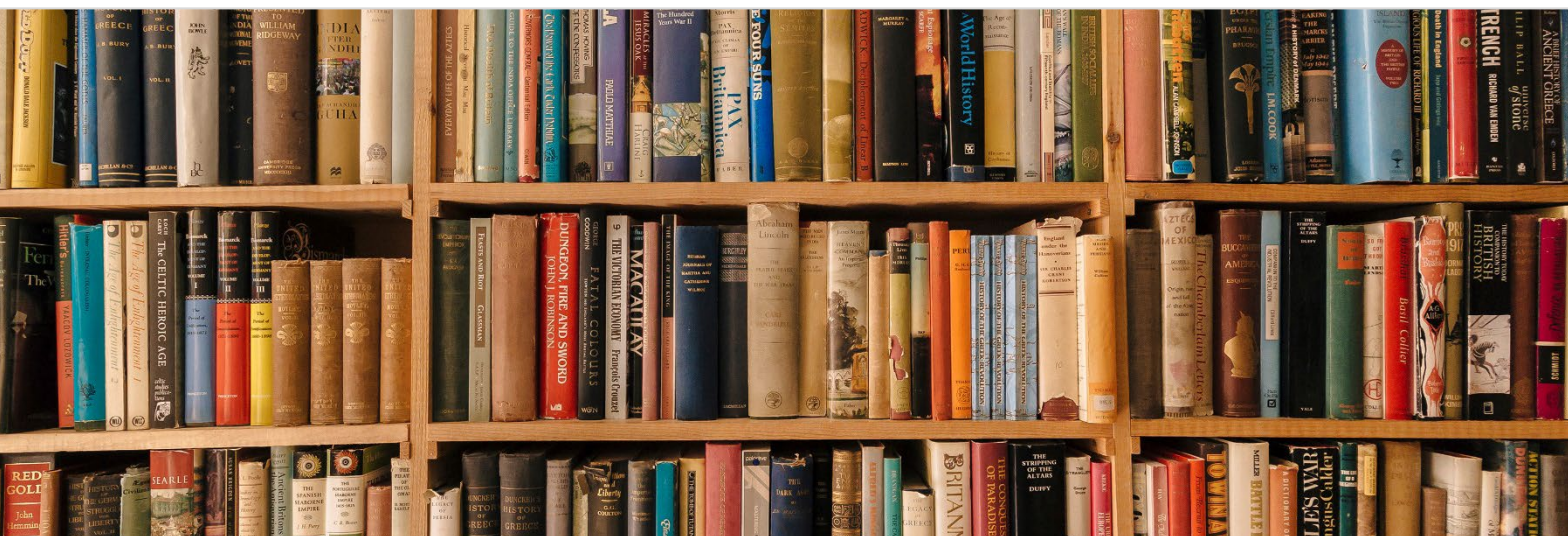


This eLearning module will enable you to access and use the Accounts Enquiry screen.

In completing this eLearning module end users will be able to:

- Access and navigate the Accounts Enquiry screen.
- Run Standard Reports.

Draft Billing



This eLearning module will enable users to create a draft bill request. It will cover how to authorise the request, to track its progress and how to produce the final bill.

In completing this eLearning module end users will be able to:

- Create a Draft bill.
- Select and authorise the draft bill to send to the Accounts department for processing.
- Locate and view the progress of the draft bill.
- Produce the final bill.

Accounts Month / Year End



This eLearning module will enable accounts users to generate and save month end reports, review and submit VAT returns and close down financial periods.

In completing this eLearning module end users will be able to:

- Run Month End reports and complete Month End procedure.
- Run and save VAT return and transactions reports.
- Reconcile and close the VAT Quarter.
- Complete the Year End procedures including batch clear-down.

Accounts Legal: Training

Accounts Course



This course provides the attendees with the skills to configure and manage the firm's Accounts Application as well as the setup of some of the Accounts configuration in the Utilities Application.

The course also covers posting accounts transactions, viewing ledgers and archiving, Bank reconciliation, Report manager, VAT reconciliation, Month end and Year end. This course is suitable for Cashiers and Accounts staff.

In completing this virtual classroom session users will be able to:

- Discover how Legal Accounts will support your business.
- Posting periods and manage your batches.
- Enter financial postings and maintaining ledgers.
- Reviewing and reconciling accounts.
- Completing month end, year end and VAT quarter procedures.

Pre-requisites

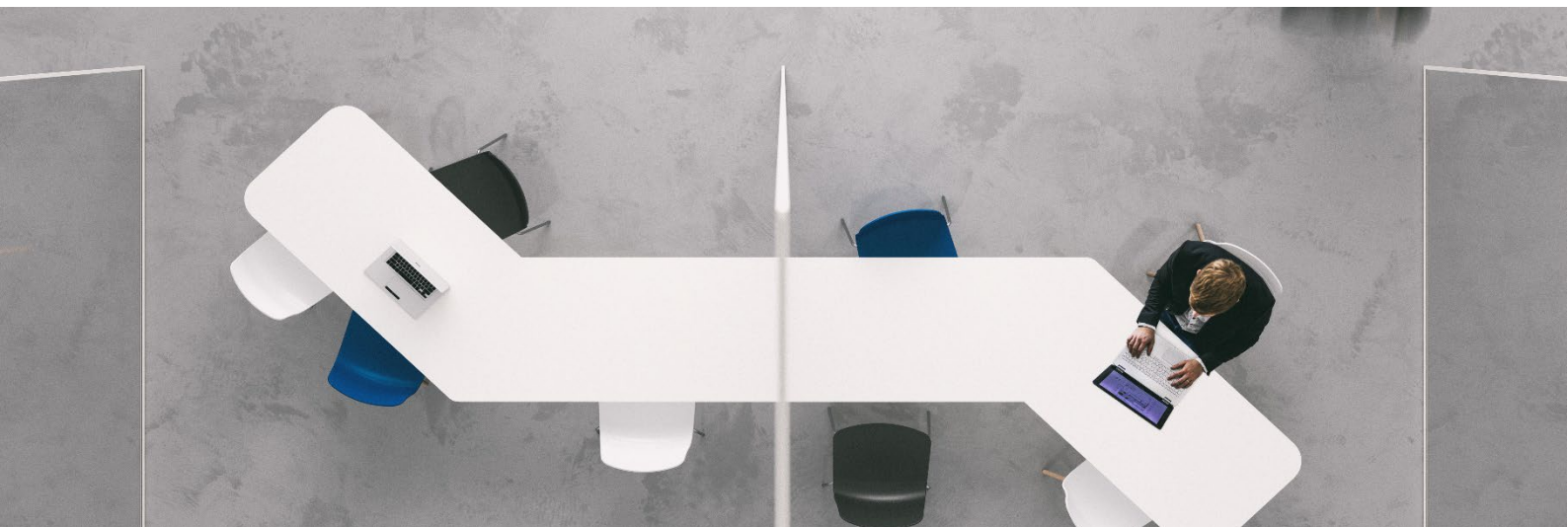
We recommend that each person taking part in this course should have access to a PC/Laptop.

The workshop where possible should take place away from the usual working environment to ensure minimum disruption and maximum focus.

Delegates should have completed the eLearning modules prior to attending this workshop and should attend with a list of topics which require further discussion.

Business Tax Portal: Digital Learning

Imports, Adjustments and Submission



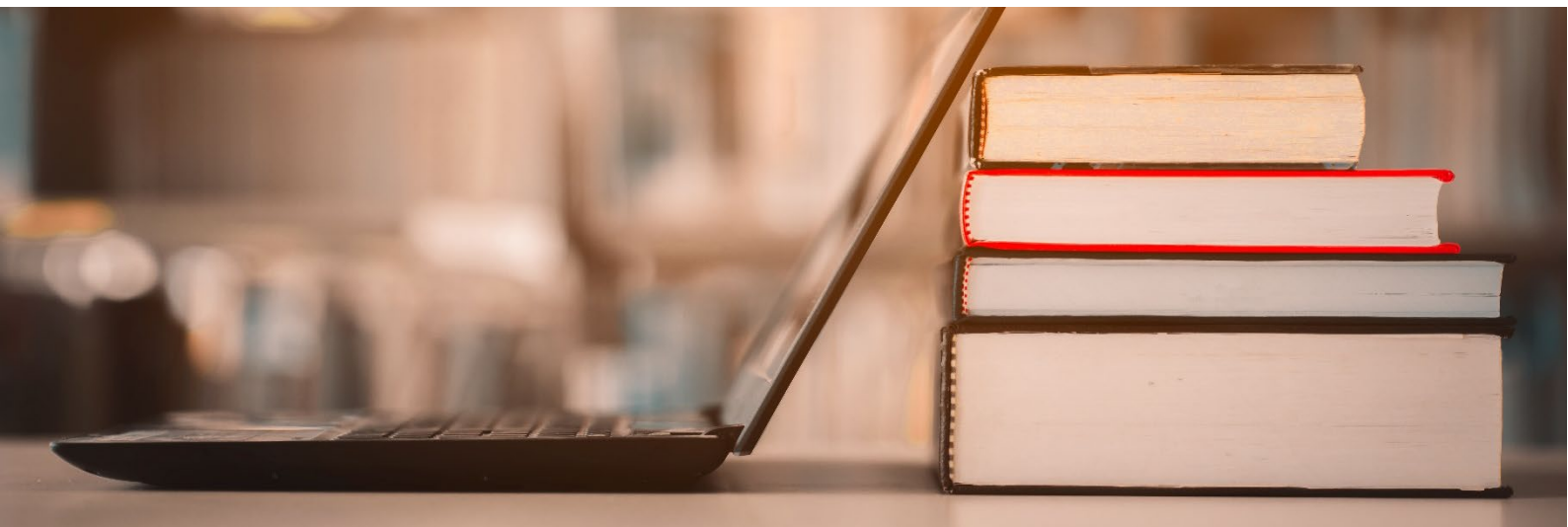
This eLearning module will enable learners to navigate the portal. Complete Imports and Adjustments to VAT returns. Complete a submission to HMRC via the portal.

In completing this eLearning module, participants will be able to:

- Discover how to navigate the solution.
- Import CSV files.
- View and correct import errors.
- Make adjustments.
- Explore the principals of Liabilities, Obligations and Tax Payments.
- Submit a VAT return.

Legal Forms: Digital Learning

Library

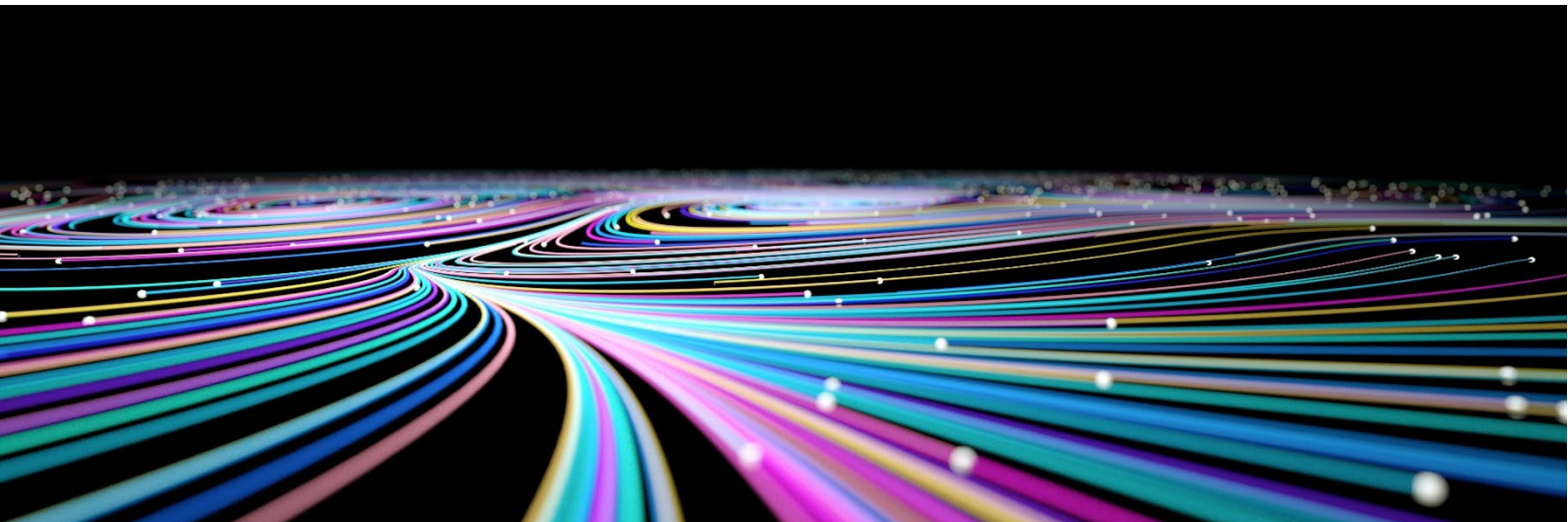


This eLearning module will enable users to navigate the Legal Forms library. They will be able to create and download forms and other useful functions such as sharing with clients or colleagues and bundling forms.

In completing this eLearning module, participants will be able to:

- Log in successfully.
- Navigate Legal Forms Library.
- Produce and save Legal Forms.
- Change, clone and share Legal Forms.
- Locate the resource centre.

Hub



This eLearning module will enable users to create and submit Legal Forms via the Hub to the HMRC, Land Registry and Companies House gateway and discover how to deal with rejections/requisitions from those agencies.

In completing this eLearning module, participants will be able to:

- Log in successfully.
- Navigate Legal Forms Hub.
- Create and submit Hub Forms.
- Deal with rejected Forms.
- Change, clone and watch Legal Forms.

IHT400 Workflow

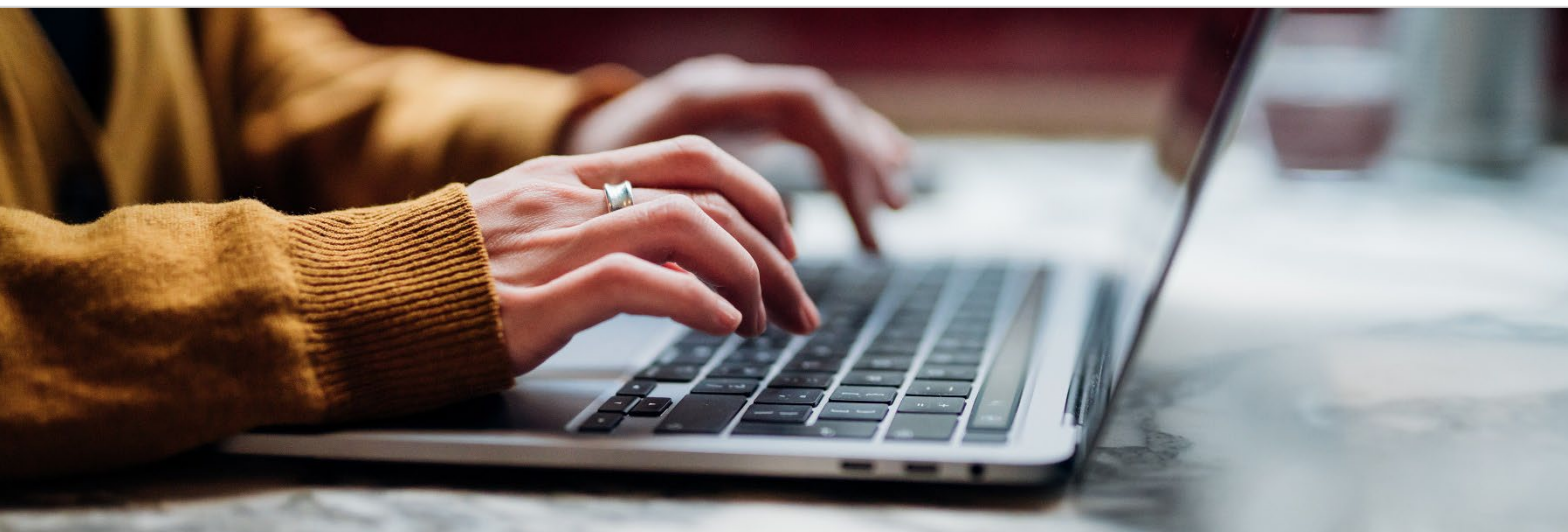


This eLearning module will enable users to navigate the IHT Workflow homepage, create the IHT400, add schedules and download the forms.

- Produce the IHT400 form.
- Choose and attach the appropriate schedules.
- Generate and download the final version.

System Administration: Digital Learning

Practice & Case Management: New User Creation

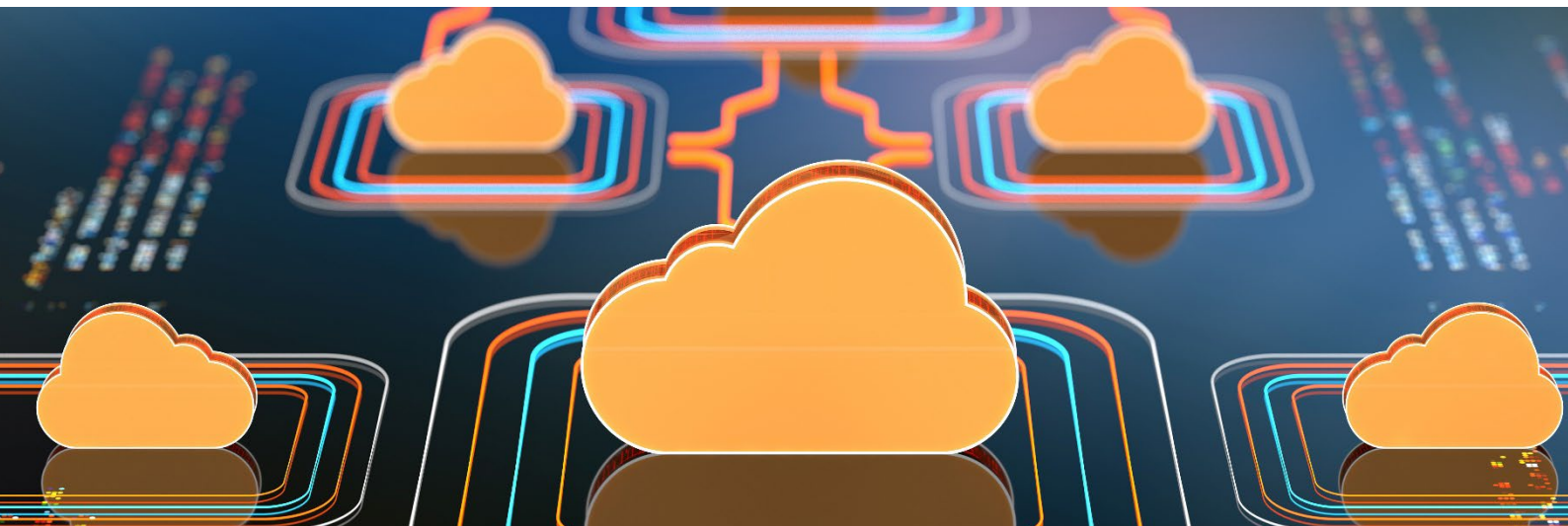


This eLearning module will enable administrators to create new users and fee earners. They will also be able to assign permissions and private charge rates.

In completing this eLearning module end users will be able to:

- Create a new user.
- Apply permissions and assign licences.
- Create a new fee earner.
- Set up fee earner private charge rates.

Practice & Case Management: Data Cleanup Tool



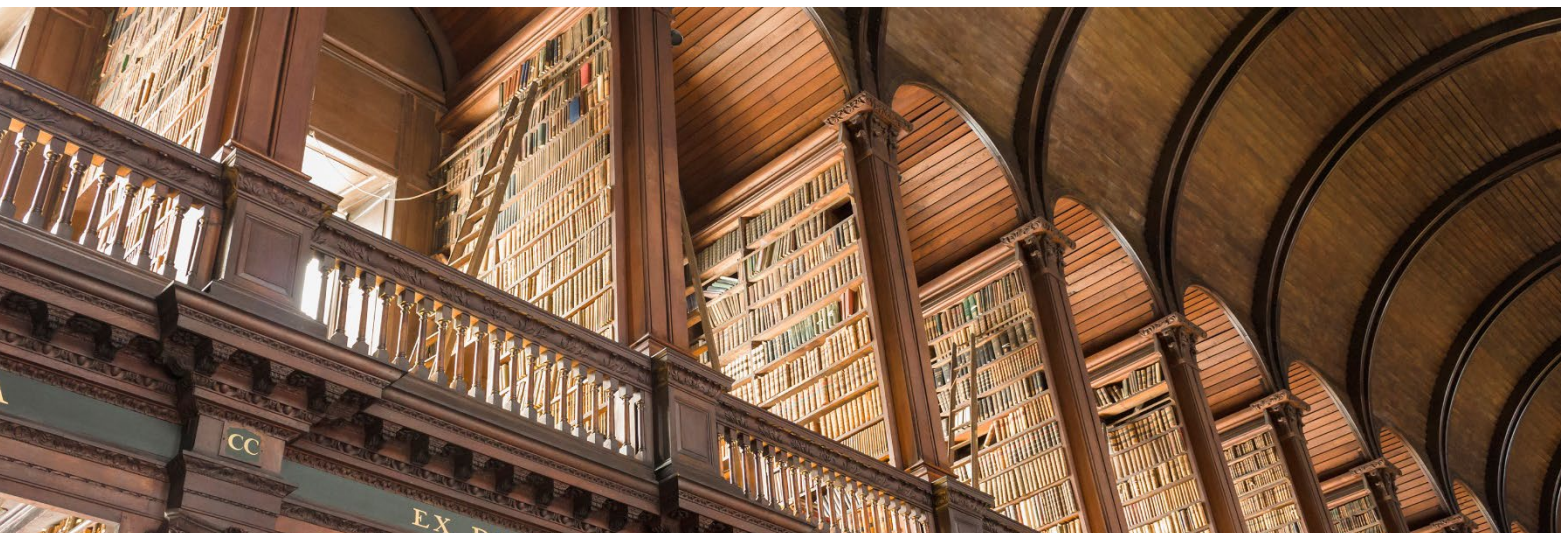
This eLearning module will enable administrators or users with the relevant permission to search for duplicate Clients, Contacts and Services and merge those duplicates into a single record.

In completing this eLearning module end users will be able to:

- Identify duplicate records.
- Analyse the results.
- Use the data cleanup tool.

Review the merged data.

Practice & Case Management: Archiving



This eLearning module will enable users to discover how to archive and resurrect matters and configure your solution to meet specific requirements.

In completing this eLearning module end users will be able to:

- Configure the system settings for your organisations needs.
- Identify the different ways to mark a matter for archiving.
- Archive and resurrect a matter.
- View and edit archived information.

Practice & Case Management: Document Template Production

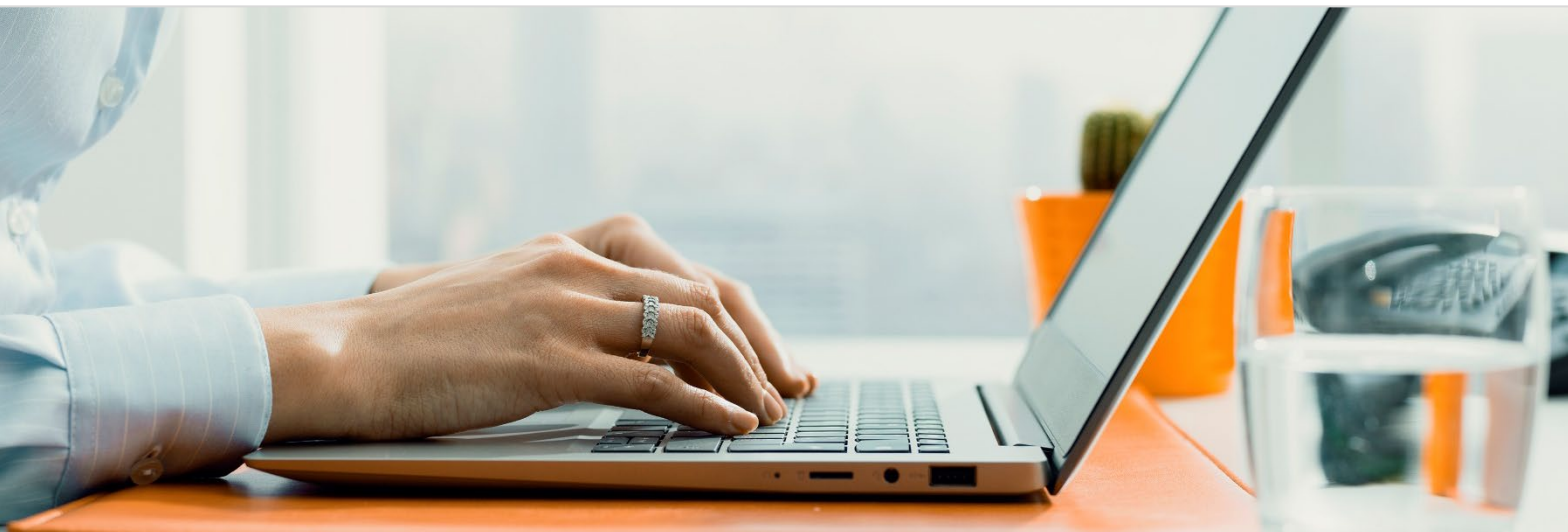


This eLearning module will enable system administrators to create and manage document templates that will be utilised by end users within your organisation

In completing this eLearning module end users will be able to:

- Create new Client letters.
- Create header templates.
- Use the basic features of the Field Code Selector.
- Create and map Form templates.

Practice & Case Management: Office Add-In's



This eLearning module will enable users to file incoming and outgoing emails directly to a matter and record time as part of the process. They will also be able to save and record time for Word documents created outside of OneAdvanced Legal and assign diary entries from the Outlook Calendar to the system.

In completing this eLearning module end users will be able to:

- Configure the Word, Outlook and Exchange Integration Add-ins.
- Produce and save a Word document to the system.
- Choose which emails to save to the system.
- Select diary entries to save to the system.

Business Tax Portal: Getting Started



This eLearning module will enable learners to navigate the portal. Complete Imports and Adjustments to VAT returns. Complete a submission to HMRC via the portal.

In completing this eLearning module, participants will be able to:

- Discover how to register the Business Tax Portal.
- Initiate the tax registration with HMRC.
- Explore how to add a company to submit returns.

Business Tax Portal: Configuration and Administration

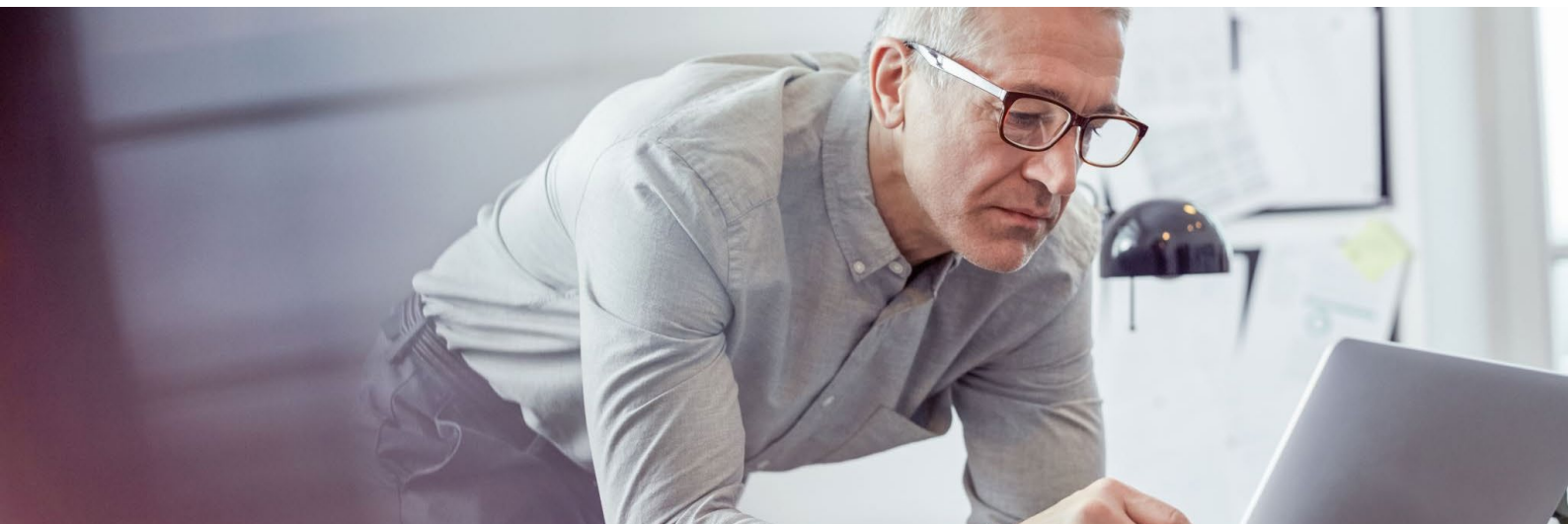


This eLearning module is designed to enable the configuration and initial setup of the portal. Exploring the admin settings for the portal and users.

In completing this eLearning module, participants will be able to:

- Setup connections to your system and the portal.
- Create and maintain users for the portal.

Legal Forms: Administration



This eLearning module is to explore how an administrator can maintain their practice details, setup user profiles and configure settings including the gateways to HMRC, Land Registry and Companies House.

In completing this eLearning module, participants will be able to:

- Maintain your practice details.
- Manage your user's profiles and permissions.
- Meet data compliance requirements.
- Configure gateway, DMS and Single Sign on settings.

OneAdvanced Legal Training CPD Accreditation

These OneAdvanced Digital 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 your Digital Learning Path Accreditation, 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.




Powering the world of work


Our business software is the trusted choice for critical sectors, including healthcare, legal services, and education. We keep the world of work moving.

Speak to our expert consultants for personalised advice & recommendations, & get support on the products you are interested in.

Contact Us

 +44(0) 330 343 4000

 www.oneadvanced.com

 hello@advanced.com