

## Service Overview

# FlightPath for Access Education Finance

Together we'll land this implementation



## FlightPath your Access software journey

We believe wholeheartedly that the functionality that our software offers our customers is very important, but it is only half of the value equation, how the system is rolled out is critical if full value from your new investment is to be achieved.

We also know that you may view new software implementations with some trepidation and many customers can find this period daunting. In fact, for some customers, this may be the first software roll out they have managed. We recognise this and we have designed our best practise, remote-first implementation services to help ensure you have a great experience and are looked after along the way, so that the whole process is less daunting... this is our FlightPath implementation approach.

## Seamless implementation, delivered 100% remotely

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

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***Our Flightpath implementation was top notch, our expectations set at the beginning of the project were met and we felt well supported throughout.***

 **graze** ”



## **FlightPath:** your six-stage journey to success

We'll be sending you regular updates to keep you on track and ensure it is clear where you are on the journey - every step of the way.



### **6. Review**

Check-in to see how you are progressing

### **5. Launch**

Get the product into your colleagues' hands

### **4. Validation**

Ensure all is working to your expectation

### **3. Learning**

See what the product can do and train your colleagues

### **2. Preparation**

Configure your systems in readiness

### **1. Getting started**

Familiarise yourself with the process and product

## You have control, but we are never far from your side.

Each FlightPath implementation programme from Access follows a well- defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

## Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

## Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

To ensure The Access Group can continue to support all our products, we have made sure 100% of our support teams can work securely and seamlessly from home. We have increased the capacity of our telephone system so support teams can be contacted wherever they are working using our usual support phone numbers.

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***Sarah was an amazing coach and support throughout our Flightpath implementation - her help in getting this module off the ground was invaluable.***



## FlightPath for Access Education Finance

The tables below summarise what's included within the FlightPath packages. We will help you choose the package that's right for you but please review this table to ensure your understanding.

FlightPath A	FlightPath B	FlightPath C
<p><b>Overview</b> Implementation of Access Education Finance to a <b>single academy</b>. Simplifying financial accounting in schools, academies and academy trusts, providing an accountancy package you expect, but better.</p>	<p><b>Overview</b> Implementation of Access Education Finance to a <b>Multi academy Trust</b>. Simplifying financial accounting in schools, academies and academy trusts, providing an accountancy package you expect, but better.</p>	<p><i>Taking off soon...</i></p>
<p><b>FlightPath Content</b> <b>Implementation of Access Education Finance including:</b> All modules contained within the system, tailored to the specific setup of your organisation.</p>	<p><b>FlightPath Content</b> <b>Implement Access Education Finance including:</b> All modules contained within the system including the optional to use central bank functionality, tailored to the specific setup of your multi academy trust.</p>	
<p><b>Included FlightPath Services</b> Key services delivered include; remote system design and scoping; migration of customer, supplier and chart of accounts information; training for end users on all system functions and handover to our dedicated support team.</p>	<p><b>Included FlightPath Services</b> Key services delivered include; remote system design and scoping; migration of customer, supplier and chart of accounts information; training for end users on all system functions and handover to our dedicated support team.</p>	
<p><b>Excluded Flightpath Services</b> Additional Site/user training Ad-Hoc Consultancy Services On-site tailored training</p>	<p><b>Excluded Flightpath Services</b> Additional Site/user training Ad-Hoc Consultancy Services On-site tailored training</p>	

Greater detail can be found in the tables on the following pages.

## Product features enabled per FlightPath package for Access Education Finance

Feature	Summary	FlightPath A	FlightPath B
<b>Multiple Sites</b>	System setup and configured for use across multi sites, allowing for consolidation of date		●
<b>Central Bank Setup</b>	Optional setup of central banking functionality		●
<b>Web based</b>	Intuitive Browser Based functionality	●	●
<b>Multiple Users</b>	Multiple Access Rights and Authorisation Levels	●	●
<b>Chart of Accounts</b>	User Defined CofA including Fund Codes, Ledgers, Cost Centres, Analysis Codes, ISB/CFR Codes, VAT Codes, Catalogue Codes	●	●
<b>Budgets</b>	Budget Management, Profiles, Virements, Dynamic Link to Education Budgets, Purchase Requisitions, Purchase Orders, Suppliers, email to Suppliers, GRN's Invoice from PO/GRN, Credit Notes	●	●
<b>Payments</b>	Manual Cheques, Cheque Runs, Printed Cheque Runs, BACS Run, BACS remittance, BACS Export	●	●
<b>Transactions</b>	Petty Cash, Credit Card, Debit Card, Sales Invoice, Sales Credit Note, Journals	●	●
<b>Receipts</b>	Manual Receipts, Bulk Receipts	●	●
<b>Bank Reconciliation</b>	Manual Bank Reconciliation	●	●
<b>Opening Balances</b>	Debtors, Creditors, Unreconciled Items, Balance Sheet Accruals	●	●
<b>Period End</b>	Run, View Pending, Transactions, Opening/Closing periods, Re-opening periods	●	●
<b>Reports</b>	Balance Sheet, BvAvC, income/Expenditure, Trial Balance, Cash Flow Report, VAT Return and VAT 126, Purchase Order Report, Aged Debtor/Creditor, Bank Reconciliation, Unreconciled and Reconciled transactions, Budget Virement/Budget Holder, BACS Audit Report, Outstanding Requisitions, List of Suppliers/Customers, Supplier/Customer missing details report, List of Chart of Accounts, System Audit Report, Consolidated Reports	●	●



## Implementation Services included in FlightPath for Access Education Finance

		FlightPath A	FlightPath B
<b>Welcome / Scoping Meeting</b>	Your Consultant will arrange a date to conduct a remote scoping session with you to familiarise you with the journey and to determine how the system should be configured for you	●	●
<b>Data Load</b>	You send us your data in the required format, and we will load into your system	●	●
<b>Training Session 1</b>	We will familiarise you with all the basic functions of the system and get you using the software hands-on (4-7 hours)	●	●
<b>Training Session 2</b>	We will provide a refresher on your first training session then train you on more complex system functionality, including payments, transactions, receipts, journals and bank reconciliation (4-7 hours)	●	●
<b>Training Session 3</b>	In your final training session, we will revisit any areas from your first two sessions, then review opening balances, period end and reporting	●	●
<b>On-going Communications</b>	You will receive regular communication and reminders during your implementation	●	●
<b>Support Handover</b>	Now fully trained on using Access Education Finance, we will ask you to sign off on your training and provide you with a formal handover to our support team	●	●

### Notes

1. Access Education Finance links to Access Education Budgets only. In addition, there are specific CSV templates available for various banks, but no other tangible links are provided unless specified.
2. Our training plan is designed to cover all aspects of the system in detail, prior to sign off by you. We will not credit the customer for any unused time where the system has been adopted sooner.

## Additional Services available for Access Education Finance

On top of the services included within the standard FlightPath packages, the table below highlights the additional value-added services that our consulting teams can provide.

<b>Project Scoping</b>	When a Multi Academy Trust adds additional sites, we will support you with a scoping session, to determine how your new site should be configured and deployed within your system
<b>System Data Setup</b>	When a Multi Academy Trust adds additional sites, we will ensure your system is pre-configured with your Chart of Accounts, Customer and Supplier information
<b>Ad hoc Consultancy</b>	Our team of education specialists can provide ad hoc consultancy (single or multiple days) to schools, academies and trusts on all aspects of school financial management.
<b>Budget Workshops</b>	A classroom based training session designed for multiple delegates focusing on how to budget using Education Budgets (software sold separately).
<b>End User Training</b>	User Training for end users of the system, tailored to meet the requirements of the customer. This training can be focused on with Education Budgets OR Education Finance.





## About The Access Group:

The Access Group has been recognised in The Sunday Times Tech Track 100 in 2019 and is a leading provider of business software to mid-sized UK organisations. It helps more than 32,000 customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace cloud platform transforms the way business software is used, giving every employee the freedom to do more.

Established in 1991, The Access Group, with an enterprise valuation of over £1billion, employs more than 2,300 staff.

For more information about The Access Group, visit: [www.theaccessgroup.com](http://www.theaccessgroup.com)

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