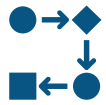# system set-up

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agenda

- Introduction + login
- Overview of ARM Pro
- Administer staff
- Customise brand, style + shortcuts
- Administer clients, contacts + programs
- Manage training + support
- Next steps

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project schedule

- System Set-Up
  - Briefing
  - System set-up
  - System configuration

- Goal Development
  - Data management
  - Strategy
  - Schedule rollout training

- Training Proficiency
  - Online training
  - Process reviews

- Organisational Competency
  - Review session
  - Gap identification + action plan to address gaps

- Transition
  - Project review + testimonial

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community services + NDIS software
to free up time to do more of what matters

The demands of the community sector mean that there is significant administrative overhead. Too often compliance requirements detract from the resources and energy that could be better directed to clients and important causes. MYP's platform is uniquely placed to address these challenges.

In short, MYP is a game changer for the community sector bringing together all the key data, information and processes into one environment. MYP helps organisations improve efficiency, control costs and streamline processes in a sector that is changing rapidly and is more demanding than ever.

ARM PRO

ENHANCE
STAKEHOLDER RELATIONSHIPS

Manage clients, cases, stakeholder relationships, opportunities, projects + client history. Integrate with accounting software, access NDIS price lists + more

GENIUS my NDIS manager

THE ULTIMATE
COMMUNITY SERVICES PLATFORM

Finally, the complete platform for your NDIS management. Paperless, efficient, integrated + comprehensive.

POCKETWATCH

SIMPLIFY
STAFF ROSTERING

Create individual + team rosters, keep track of your assets, resources + timesheets - integrate with your cloud accounting software

94six smart HR

IMPROVE
PEOPLE MANAGEMENT

Manage your staff + volunteers proactively, foster accountability + encourage professional development

G⊙MS
Goal + Objective Management System

TRACK
CLIENT GOALS

Develop goals, accurately match them to individuals + track progress to deliver person-centric outcomes while meeting reporting requirements

formSPACE PRO

BUILD
EFFECTIVE ONLINE FORMS

Capture, track + access in real time all of the client data you need in one place now with digital signatures

eMarketing

COMMUNICATE
WITH YOUR VAST WORLD

Keep stakeholders engaged through newsletters, promotions + events

myDocs

ACCESS + MANAGE
DOCUMENTS EFFICIENTLY

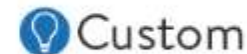Retrieve + edit documents where + when you need them

myGift

MANAGE
DONATION CAMPAIGNS

Plan + track all campaigns from one place while maximising 'giving' income + minimising administration

vBoX
one place, my space

INTEGRATED WEBSITES
FOR COMMUNITY SECTOR

Connect your website + contacts with your systems, eliminate data entry + maximise opportunity

Custom

GOT AN IDEA?
BRING IT TO LIFE

Customise an existing MYP module or work with us to create your own software

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communication

Initial training dates (Client Success Managers)

- Phone calls + emails

Data management + system set –ups (Certified Trainers + CSOs)

- Ticket system

Training (before)

- Confirmation of training
- Calendar invite + link
- Check in 1 day prior to training

Training (after) (Certified Trainers)

- Summary email + action steps

Project check in (Client Services Manager/Client Success Managers)

- Phone calls + emails

Review (Client Services Manager)

- Summary email + action steps

Life of subscription

- Support Centre

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MYP Champion responsibilities

The role of the MYP Champion
is critical in ensuring
implementation
and ongoing use of MYP in the
organisation. Thus ensuring a
quality outcome and a significant
return on investment.

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MYP Champion responsibilities

Point of contact between MYP and Subscriber organisation	Assist with the set up Tailored Training
Co-ordinate relevant staff for attendance at formal MYP Certified Training sessions	Assist where required prior, during and post Tailored Training
Act as the initial myDocs or 94six Administrator (if relevant)	Act as the first point of contact for MYP related enquiries from staff
Provide user support to all untrained staff	Actively roll-out the MYP Implementation Plan developed during training
Actively encourage staff to implement MYP as part of standard process	Read monthly eNews to maintain up-to-date knowledge of products and training options and forward/distribute relevant updates to staff
Update organisation social media channels – Facebook, Twitter, LinkedIn	Support staff to connect to MYP via social media
Attend relevant product demonstrations and professional development	Provide feedback and improvement suggestions to MYP
Respond to MYP administration enquiries	Liaise with staff who have unsubscribed from eNews
Action bounce-back emails/staff departure	Confirm Tailored Training

MYP important system administrator notification

MYP generates a range of automated notification emails which include staff login emails. To ensure that these are not blocked by your IT security system, MYP needs to be whitelisted. Please forward the following information to your IT provider or administrator for actioning:

RECOMMENDED WHITELISTING

post.mypcorp.com, post2.mypcorp.com, post3.mypcorp.com, post4.mypcorp.com

MYP does not recommend subscribers use IP addresses as the basis for whitelisting MYP as these may change with system upgrades. However, where the above recommended actions cannot be implemented by the Subscriber and the only method of whitelisting available is based on IP addresses, please note the following:

20.40.188.210, **20.40.175.215**, **149.72.250.29** and **167.89.101.157**

ADJUSTMENT OF ANY INCOMING CLIENT EMAIL LIMIT

If you currently have a limit on the number of emails per client received by your system, please adjust to ensure it caters for the number of emails scheduled to be received from MYP over your survey period.

https://home.mypcorp.com/myp-automated-emails/

ARM Pro
all the power of ARM plus
customisation to maximise efficiency

Manage new opportunities with high value reports

Coordinate projects from inception to delivery by allocating tasks + managing timelines

Establish links + relationships

Compile + analyse data + maintain security of client records

Track sales from prospect to results

Maintain a history of client/prospect activity + communication

Accessible from anywhere, anytime

MYP
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getting started

Log in at mypcorp.com

3 chances to log in

update your password, passcode, security question + myAssistant in myAccount

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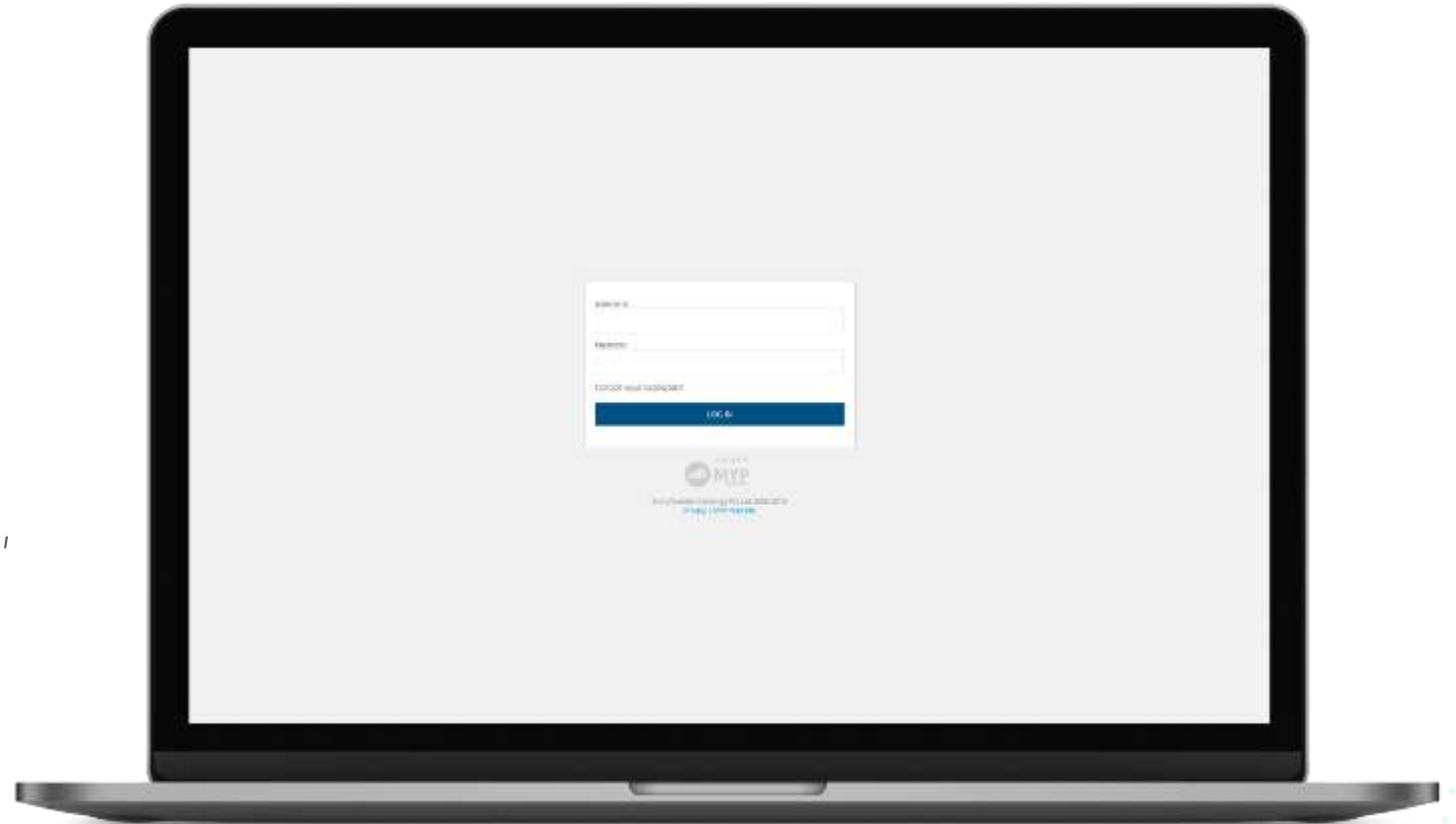
myAccount

Password, passcode, security question, two-factor authentication, myAssistant, single sign-on + certificates.

passcode instructions

You have the option to create a passcode with a minimum of 4 digits for your mobile login access. The first time you log in on your mobile device MUST use the standard Username + Password. Subsequent logins can then be made using your stored passcode. We highly recommend that you also use the built-in security features on your mobile device (e.g. facial recognition).

NB: If you have set up a passcode and you are not provided with the option to switch to PIN on log in, please ensure that you are not:

- Browsing in private browsing mode – this deletes 'cookies' stored in your browser necessary for passcode login

- Automatically clearing browser data + cookies when closing your browser via settings or third party applications

MYP perform

two-factor authentication

Two-factor authentication (2FA) methods provide users with additional account access security. Logging in requires both a password and an authentication code from a mobile device.

You will need an app on your smartphone such as Google Authenticator or Authy, which will generate the authentication codes.

You will be prompted to enter in your 2FA code once a month + whenever you log in via a new device.

If you reset your password, it will also disable your 2FA.

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single sign on

Single sign-on (SSO) allows you to log in to MYP via your Google or VMWare One Access credentials.

Navigate to the myACCOUNT page and click on the link contained in the SSO panel to link your Google or VMWare One Access accounts with MYP.

data storage

Data is stored in secure data centres located in relevant regions as required by law (e.g. Australia and New Zealand data in Australia). MYP offers multiple levels of security and data protection. It backs up all data and the data is also replicated in a separate data centre in a different location.

MYP conducts regular penetration testing which replicates the process of hackers attempting to penetrate the MYP systems.
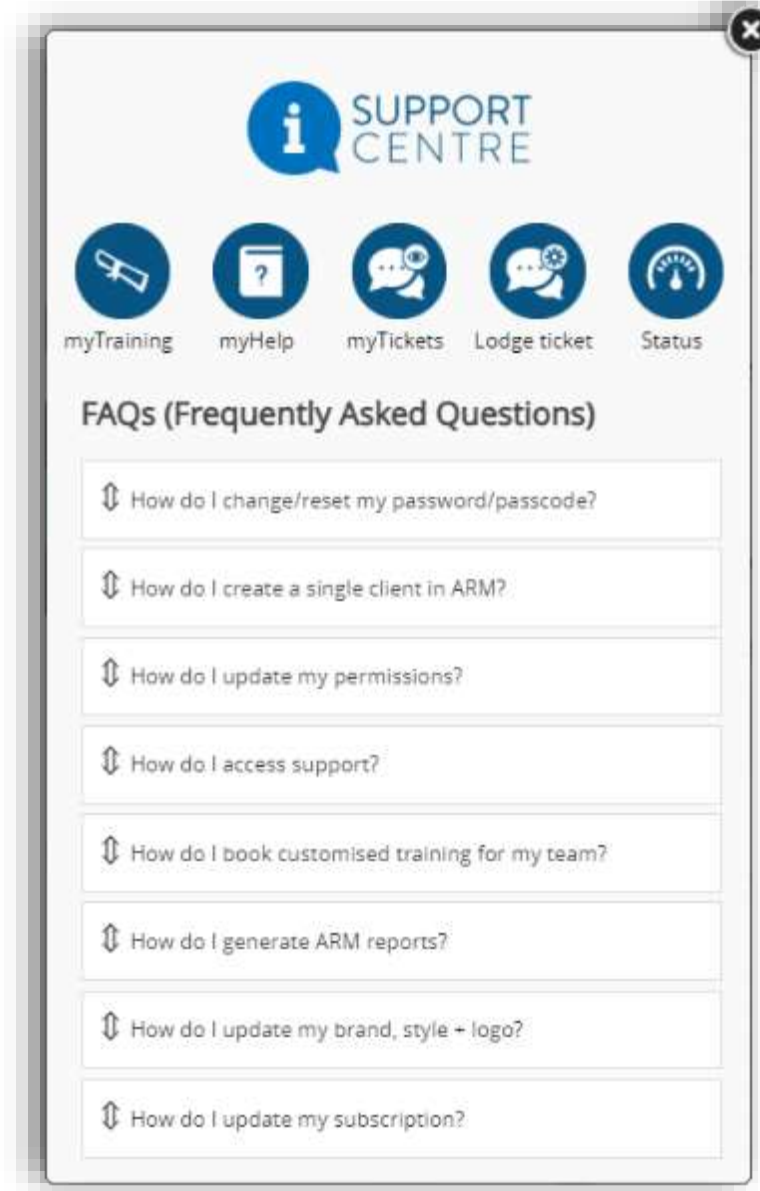
In relation to documents, an encrypted backup occurs daily.

customised signatures

ARM Pro > Edit Staff in 'STAFF' panel > Contact options > Edit email signature

client + contact data scenarios

Scenario	Solution
Data is stored in physical or digital documents, no data is available in Xero/MYOB	Import to MYP via CSV, set MYP as source of truth via API Settings > Structure –sync to third party API
All data is stored entirely in Xero/MYOB	Import data from third party API once, set MYP as source of truth via API Settings > Structure – sync to third party API
Data is partially stored in Xero/MYOB, partially in physical or digital documents	Import data partially stored in third party API once, export all data from MYP as CSV, complete export CSV with remaining data, import combined CSV to MYP, set MYP as source of truth via API Settings > Structure – sync to third party API Outcome: No duplicates will be created but data previously stored outside of the system has been created
Data is partially in MYP, partially in Xero/MYOB	Create a back-up for the third party API, export data from MYP to third party API – identify any duplicates created: A) Merge duplicates in Xero/MYOB, selecting the duplicate from MYP as primary source of data OR B) Amend duplicate records to match existing records in third party, revert third party API to last backup and trigger another export
All data is stored in MYP	Set MYP to export as the source of truth via API Settings > Structure – Data will sync to third party API as it is created

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support centre

- Access myTraining + myHelp
- Lodge, view + update support tickets
- View frequently asked questions

learn to use your systems, your way

delivery styles to suit your needs

MYP Training
free online group training

MYP Training sessions are run on a regular basis. These online sessions are free to attend as many times as you like and are a great way to refresh your skills.

Want to attend?
Check out all the details of upcoming MYP Training sessions and book your place via the calendar on your MYP home page.

MYP Tailored Training
custom online or onsite sessions

MYP Tailored Training sessions are available if you require a session specifically for your organisation. These sessions are custom-designed by our trainers and can be run onsite or online for a fee.

Want to know more?
Simply login to MYP and submit a booking enquiry via the 'Subscription + Training Management' area.

covering everything you need to know
MYP Training, 24/7 myTraining and Tailored Training sessions cover two types of content to ensure you are getting the most from MYP.

CERTIFIED ACCESS LEVEL 2 SUPPORT

'Certified' sessions cover specific modules and, upon completion, attendees gain access to Level 2 Support.

PROFESSIONAL DEVELOPMENT NON-CERTIFIED

'Professional Development' sessions are designed to further develop skills in specialist areas.

mypcorp.com

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service level agreement

All support requests will be responded to by a support team member within the following timeframes:

During business hours

Non-urgent - 2 hours

Urgent - 30 minutes

Critical - 15 minutes

Outside standard business hours

Critical - mobile support by rostered MYP support team member

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FUNCTION AVAILABILITY

Unfortunately, this function is currently unavailable.

A ticket request **#312853** has been automatically created for you in the ticket system. A member of the MYP Support team will be working to restore access again for you as soon as possible and will communicate their progress via the ticket.

To assist us in determining the cause of this issue, can you **please specify what you were doing before the exception occurred?**

We apologise for any inconvenience.

FINISH

MYP *perform*

MYP #123456: Logo upload - Message (HTML)

File   Message   Help   Acrobat   Tell me what you want to do

Delete   Archive   Move   Reply   Reply All   Forward   BBs - Spam2   Mark Unread   Find   Zoom   Customer Manager

MYP #123456: Logo upload

Reply   Reply All   Forward

Thu 30/01/2020 3:35 PM

Action Items   + Get more add-ins

Hi John Smith

Thank you for contacting us. Your request has been submitted to our support system and a member of our support team will attend to it shortly.

To reply, please log in to myTickets and continue your correspondence with the relevant MYP support staff member.

CLICK TO LOG IN + REPLY

DO NOT REPLY TO THIS EMAIL.

Ticket #: 312854
Type: User support
Status: New
Module: ARM Pro
Subject: Logo upload

Note:
Hi there

I would like assistance uploading my logo in ARM, can you help?

Thanks

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next steps
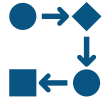
Finalise training dates

Communication – pre + post training

Review project management template in ARM self client

Data session

Strategy session

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keep up-to-date with everything MYP

read our monthly Subscriber eNews
for the latest new features, tips, tricks and training session timetables

connect with us on social media

f facebook.com/MYPCorp

in linkedin.com/company/myp-corporation

twitter.com/MYPcorp

exclusive Facebook Group for Community Subscribers
facebook.com/groups/207208608901953

mypcorp.com

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