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Overview

The role of the Process Analyst/Trainer is dependent upon the stage of the implementation. The implementation stages include prototyping, go-live and maintenance.

Prototyping

Analysis

Prototyping begins the implementation process, and the analyst/trainer's role is to participate in all prototyping sessions ensuring that all decisions and processes are documented. This includes table ownership, decisions on which pages and fields will be used, process flow documents and process guides. The analyst is one part of the prototyping team and all members of the team are expected to assist in the development of this documentation. In some cases, the analyst will do the actual development of process maps and guides. However, in some situations, other team members may develop these, in which case, the analyst's responsibility is to fine tune them and make sure they are in the standard CMS format. It is never the analyst's role to determine what the process flow is, only to document. However, if the analyst does have experience in the particular area or feels the process flow will not work well with PeopleSoft, they are expected to give input. In the end, it is always the decision of management what the actual process will be.

Table Setup

During the prototyping sessions, tables will be setup and values determined. The analyst may or may not be involved in this setup, depending on the structure of the team, but should have an understanding of what the values mean in order to support the processes once live.

Training

It may be appropriate to train the participating individuals prior to the start of the prototyping sessions. The trainer would work with management to determine who these individuals would be, and they would not train others at this time. This training would be introductory; to ensure the participants could navigate in the system and understand the basics of the database. In many cases, this might be in the form of a hands-off overview, just to give them an idea of what they are working with. If these individuals have attended PeopleSoft-led training, this will not be necessary. In some cases, it may also be appropriate to provide hands-off overviews to other members of the staff, in order to keep them informed of the on-going prototyping process. The trainers could conduct these sessions, but should be part of a larger overview provided by management so that the future end users can ask questions of them as well.

Go-Live

Training

Once the initial prototyping sessions are complete, it is the responsibility of the analyst to take the information and develop a training plan. Management in each area should have input to this plan, but it is ultimately the role of the analyst/trainer to determine what the training will look like. The focus of the training will be on how the data should be entered into PeopleSoft. However, some of the process flow information will most likely be included in an effort to make sure the end users understand the entire process. Training for go-live will take place prior to the go-live date in order for end users to be prepared for day one processing. It is critical that this training not be too far before the go-live date (4-6 weeks maximum) so users will not have to be retrained. Training manuals will be developed based on the process guides developed during prototyping. It is not the responsibility of the trainer to make sure each end user attends the training. They will schedule enough training to accommodate all end users, but it is the responsibility of the managers of the particular areas to ensure their staff members are trained. Trainers cannot schedule multiple one-on-one sessions just because people didn't register for the initial sessions offered. In some situations these types of accommodations will be made, but it is desired that all end users would attend the main training sessions.

Support

Once the system is live, the analyst/trainer will provide support to end users via the CMS Help Desk. This support will include answering questions over the phone or in person, tracking the types of calls that come in to be sure the concept was covered thoroughly in training, and scheduling additional training if necessary. There may be situations where open lab time is needed in order for a group of employees to work together for the first few days of an implementation, especially if a particular concept is being missed. The analyst/trainer will work with management to schedule these sessions, and will be present to answer questions. When these sessions are scheduled, it is again the responsibility of the area managers to ensure their staff members attend if they are having trouble.

Maintenance

Support

As end users work with the system, they will continue to use the CMS Help Desk to report problems or get clarification on specific processes. The analyst will continue to act as the Subject Matter Expert throughout the life of the project. With time, the other analysts on the staff will learn aspects of other areas and will be able to answer basic questions even if they are not the SME for that area. The analyst should be apprised of any process changes management decides to make (as they relate to PeopleSoft) in order to update documentation and notify end users as appropriate. Once the system is live, the analyst will not be expected to attend every staff or process meeting, but will document all changes and attend as required. If there are major changes to processes or new processes are being implemented, the analyst should be included in order to obtain the information first hand. For the part, however, managers should be able to provide the necessary information to the analyst for the continued support of the system.

Training

On-going training will be provided as appropriate. For central offices, classes may not be regularly scheduled, but trainers will provide small group or one-on-one sessions for new employees. If the trainer is comfortable with another staff member in the area training new employees, they may provide documentation to that person and approve security to the system once the training is complete. For non-central offices, classes will be provided on a regular basis, typically monthly. There will also be refresher courses provided for processes that may only be handled once or twice a year. As new pieces of the software are implemented, the analyst/trainer will be responsible for developing an appropriate training plan to train the end users on the new elements. In many cases, this may be as simple as providing a detailed process guide, an on-line course or a hands-off overview. However, if the trainer feels that a hands-on class is needed, they will schedule those accordingly.