

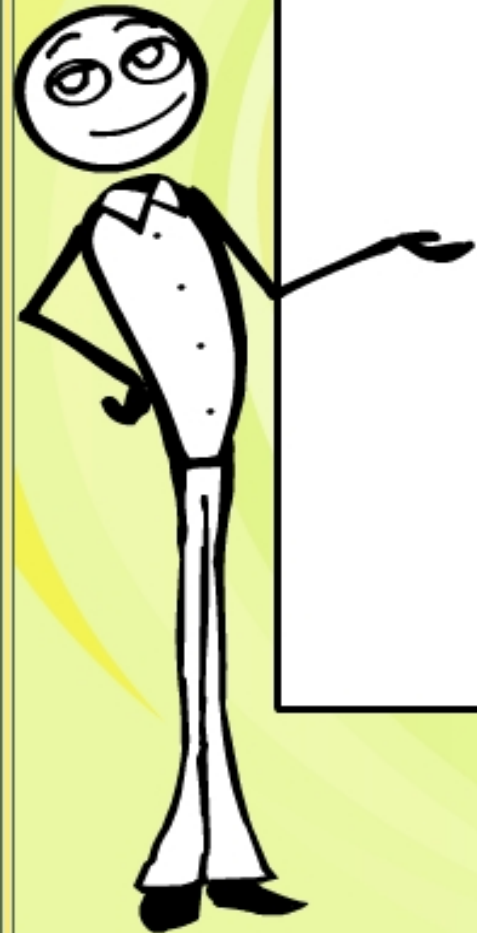
Going Full Circle

How one group analyzes, trains
and supports the masses

Session #10285

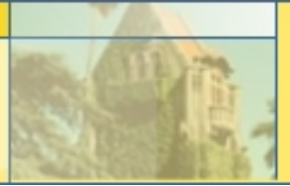
Tuesday, March 9 – 2:40 p.m.

HEUG 2004 Conference - Atlanta





Your presenters



- **San José State University**

- *Carrie Medders*

- Coordinator, Training & Help Desk

- *Shawn Bibb*

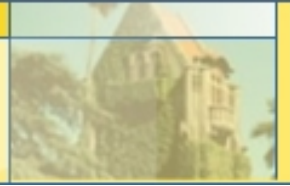
- Senior Director, Accounting & Administrative Systems

- Project Director





Who we are

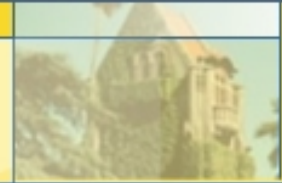


- **San José State University**
 - Silicon Valley's metropolitan university
 - Approximately 30,000 students
 - Oldest institution of public education on the west coast
 - One of 23 campuses in the California State University system





Who we are



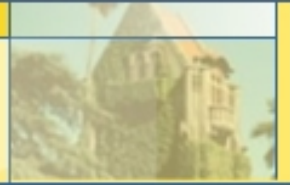
- **Carrie's News & Notes**

- Almost eight years of experience with PeopleSoft versions 6.0, 7.6 and 8.0 for HR and SA modules; versions 7.5 and 8.4 for Finance, and the PeopleSoft portal
- Background in HR -- primarily in Class/Comp
- Chair of Systemwide Human Resources User Group





Who we are



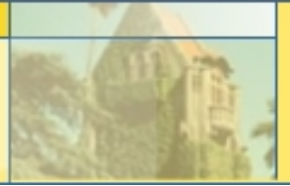
- **Shawn's News & Notes**

- Almost six years experience with PeopleSoft...working in both the HRSA and Finance modules, versions 7.5/7.6, 8.0 and now 8.4, as well as the PeopleSoft portal
- Background in Accounting and Finance
- Participated in CSU Systemwide baseline prototyping of HR and Finance modules



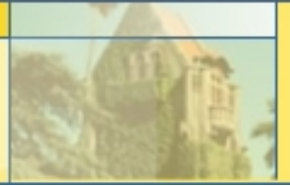


Systems Status



- **HRSA 8.0**
 - Live on CSU Baseline HRSA Apps
 - Administer & Recruit Workforce, Time & Labor, Base Benefits, Self-Service
 - Admissions, Records, Financial Aid, Student Financials, Academic Advising, Self-Service
 - Users
 - 400+ staff users
 - 2,000+ faculty users
 - 30,000 student users
 - 20,000 student applicant users





- **Financials 7.5**

- Live on CSU GL, AP and PO Baseline Apps
- Upgrade to 8.4: go-live March 15, 2004
- Users
 - 400+ staff users

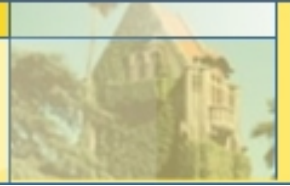
- **PeopleSoft Portal**

- HRSA Self-Service
 - Student data (personal, application, records, fee payment)
 - Employee data (personal, view job & benefits data)
- Communication tool
- Help documents





What you'll learn

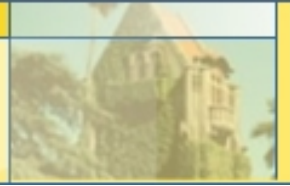


- You will learn how San José State University used a small group of analysts, as well as a small support staff, throughout the life cycle of the project to best serve its staff, faculty and student users
 - From **Process Analysis & Mapping** to **Training Documentation & Delivery** to **Help Desk Support**





What were we thinking?



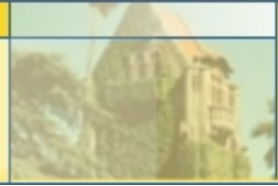
- **Analyst/Trainers**

- Full-time, permanent staff
- Participate in process review sessions; develop documentation and process maps, including fit-gap analysis
- Develop and deliver training and documentation to support those processes





What were we thinking?

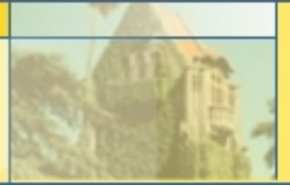


- Support Staff
 - Full-time permanent and part-time temporary staff
 - Staff PeopleSoft-specific Help Desk
 - Not part of campus help desk
 - Maintain web page and documentation





Design Flow

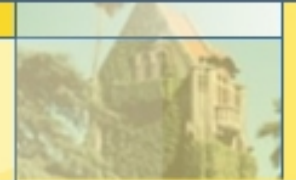


- Process Review
 - Fit/Gap
- Training
 - Development and Delivery
- Support
 - Help Desk
 - Subject Matter Experts





Process Review

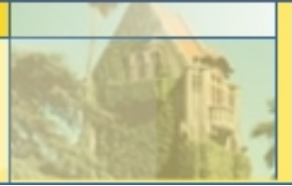


- Small groups of campus staff review processes defined by the Systemwide implementations
- Analysts lead groups in discussion of fit-gap; analyzing how processes might need to change; make recommendations on changes to appropriate management





Process Review

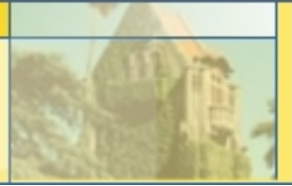


- Analysts document all process review discussions and create documentation
 - Business process guides
 - Process maps
 - Quick reference guides
 - Training manuals





What did we learn?

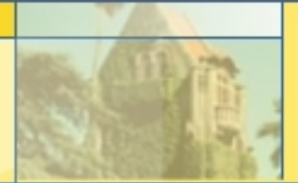


- Make sure that both staff and management understand the purpose of the reviews
- Don't be afraid to say you don't know
- Make sure you have the right people in the room
- Document-Document-Document!
 - Especially decisions made
- Leave time for homework, and demand that it be done





Training Strategy

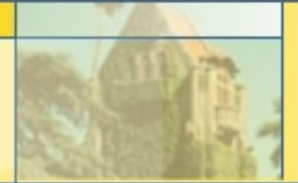


- Determined that most go-live training would be instructor-led; some hands-on, some hands-off
 - Some web-based training (no instructor)
- Worked with functional leads to determine types of classes and number of trainees
- Developed curriculum to support needs





Training Strategy

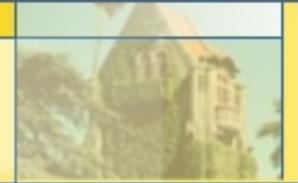


- **How did we train them all?**
 - Introductory Training
 - Hands-on and via the web
 - Go-Live Training
 - Mostly instructor-led and hands-on
 - Students/Faculty
 - Not required
 - Documentation via email and portal
 - Help Desk support





Training

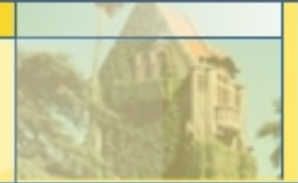


- Go-live training 4-6 weeks prior to the big day and for 2-3 months following based on the needs of our users
- Offering open labs and one-on-one sessions now that we're live





Training

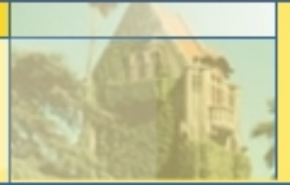


- Partnered with Synaptis to develop and deliver on-line training
 - Introductory courses
 - Less complex courses
- Business Process and Quick Reference Guides available for all users





What did we learn?

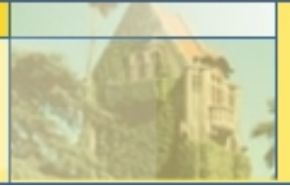


- No matter how much training you offer, it never seems to be enough
- Make sure that both staff and management understand the importance of training
 - Be the training expert
- Make sure the type of training fits the complexity of the process
- Train in a JINT model
 - Just in the nick of time
 - Avoid re-training





Support Strategy

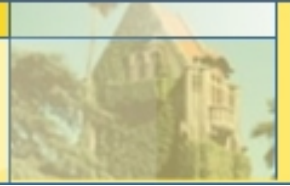


- Create a PeopleSoft-specific help desk to support all products and all users, including students
- Use analyst/trainers as subject matter experts
- Train primary help desk staff on the basics
- Collaborate with technical staff on problem escalation
- Monitor common problems for potential training issues





Support

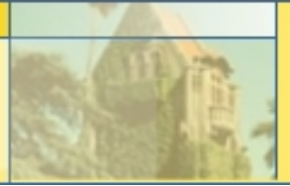


- Help Desk
 - Dedicated phone and email
- Project Web Site
 - FAQs
 - Documentation
 - System Updates
- ListServes





Support

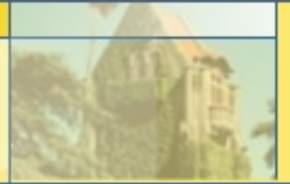


- PeopleSoft Portal
 - Self-Service information
 - FAQs
 - Documentation
- Help Desk Ticket System
 - TrackIt! by Intuit





What did we learn?

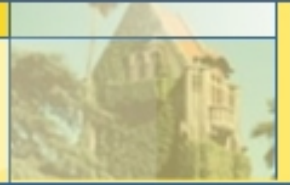


- You can't please everyone...and you shouldn't try
- Communicate to users that not everyone is an expert
- Communicate problems/changes immediately
- Customer service is key





How to find us



- ***Carrie Medders***

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- ***Shawn Bibb***

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- **<http://www.heug.org/>**

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