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### Session 168

Thursday, March 7, 2002 -- 9:15 a.m.

HEUG 2002 Conference - Las Vegas



# Who we are...

- **San José State University**
  - *Carrie Medders*
    - Coordinator, Training & Help Desk
  - *Shawn Bibb*
    - Project Director



# What's our story?

- **San José State University**
  - Silicon Valley's metropolitan university
  - approximately 27,000 students
  - oldest institution of public education on the west coast
  - one of 23 campuses in the California State University system
  - part of the first wave of 11 campuses to go live



# What's our story?

- **Carrie's News & Notes**

- Almost 6 years experience with PeopleSoft...began working with version 6.0, now with version 7.6, moving to version 8.0; mostly working with the HR modules
- Background in HR, primarily in Class/Comp
- Participated in CSU systemwide baseline prototyping and process review of HR modules and documentation
- Loves the NBA, singing, shopping and watching TV & movies



# What's our story?

- **Shawn's News & Notes**

- Almost 4 years experience with PeopleSoft...currently in version 7.6, moving to version 8.0; working in both the HR and Finance modules
- Background in Accounting and Finance
- Participated in CSU systemwide baseline prototyping of HR and Finance modules
- Loves soccer, biking, brownies and ice cream



# What we'll tell you...

- You will learn how San José State University used a small group of analysts throughout the life cycle of the project to best serve its employees
  - From **Process Analysis & Mapping** to **Training Documentation & Delivery** to **Help Desk Support**



# What were we thinking?

- Analysts participate in process review sessions; develop documentation and process maps, including a fit-gap analysis
- Analysts then develop training documentation to support those processes; deliver training
- Once live, analysts continue on-going training and support the help desk



# Process Review

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



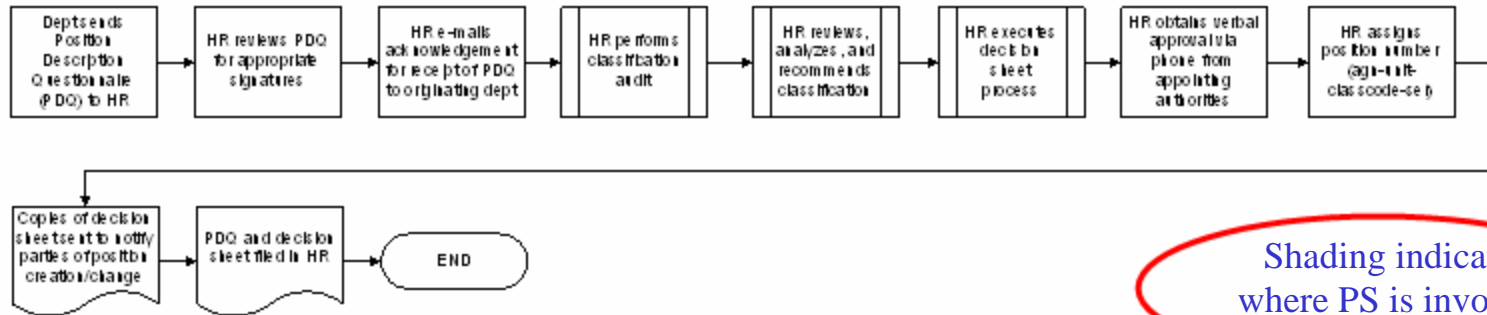
# Process Review -- cont'd

- Analysts document all process review discussions and update process guides as appropriate
- Once process review completed, process maps designed to show old and new processes
  - This was intended to help people see that only small parts of processes were going to change

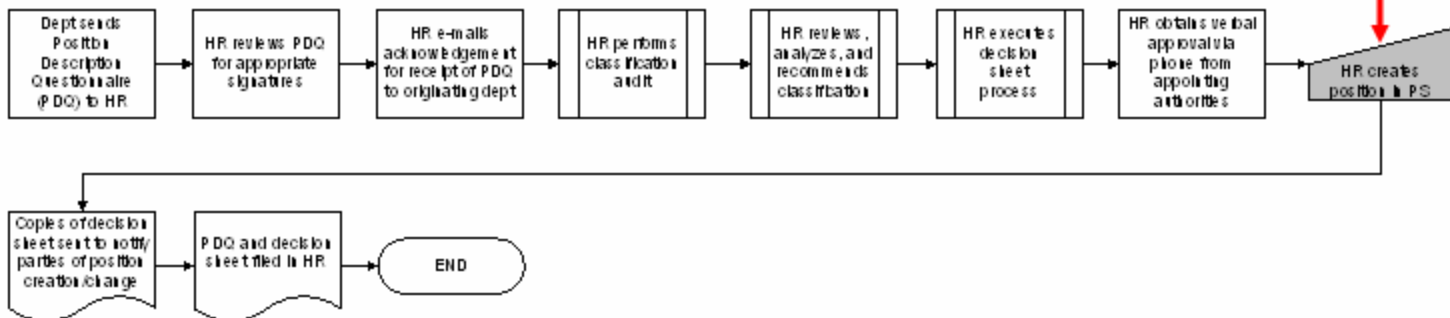


# Sample Process Map

## CURRENT PROCESS



## REVISED PROCESS





# Lessons Learned

- 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, but demand that it be done



# Training Strategy

- Determined that all go-live training would be hands-on, instructor-led
- Worked with functional leads to determine types of classes and number of trainees
- Developed curriculum to support needs



# Training

- CSU delivered systemwide baseline process guides which were updated by SJSU during process review sessions
- Made decision to create training documentation from these process guides in order to give users a step-by-step guide book for daily processing



# Training -- cont'd

- Multiple process guides were combined into a single training manual based on logical groupings and the needs of the users
- Quick Reference Guides were also created to support the end users once they had completed training



# Training -- cont'd

- Training schedules were determined based on go-live dates, user needs and trainer availability
- Implemented a web-based registration system so employees could review courses and register themselves easily
- Monitored class enrollments and added/changed classes as necessary



# Training -- cont'd

- Go-live training began 4-6 weeks prior to the big day and continued for 2-3 months following based on the needs of our academic community
  - Faculty appointment training needed to be closer to start of semester
- Offering open labs and one-on-one sessions now that we're live



# Training -- cont'd

- Offering multiple classes on-going to accommodate new employees or employees who change jobs
- Offering refresher courses for those processes that only take place once or twice a year
  - Academic recruitment/appointment



# Lessons Learned

- You can never have enough training
- Provide training when convenient for users
- Be flexible to regroup, rewrite and admit that you were wrong
- Make sure management understands how much time their employees will spend in training
- Get management buy-in that training is a priority
  - Make sure those who register actually attend



# Help Desk Support

- Added a help desk support staff to answer the main help desk line, with a rollover line ringing at every trainer's desk
- Created a help desk e-mail address for users to e-mail, rather than phone in, problems
- Utilized an existing help desk tracking system to document help desk tickets



# Help Desk -- cont'd

- Cross trained trainers in basic areas, but each was expected to be the subject matter expert in one or more areas
- Created a ListServ to communicate with campus users
- Used web site to communicate FAQs and various types of documentation



# Lessons Learned

- Train all trainers in more than just the basics -- people don't like to wait for help
- Make sure users understand that not everyone is an expert
- Get change information out immediately
- Customer service is key (yeah, like you didn't know that already!)



# So, what did you learn?

- Using the same group of people through all phases ensures that those assisting end users have the knowledge and ability to best answer the questions
- You can never have enough training or documentation
- You can never communicate too much





# Here's how to find us...

- ***Carrie Medders***  
Coord, Training & Help Desk/San José State University  
cmedders@sjsu.edu  
408-924-1886
  
- ***Shawn Bibb***  
Project Director/San José State University  
sbibb@sjsu.edu  
408-924-1663
  
- **<http://www.sjsu.edu/depts/cms>**
  
- **<http://highered.sig.cua.edu/>**  
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