

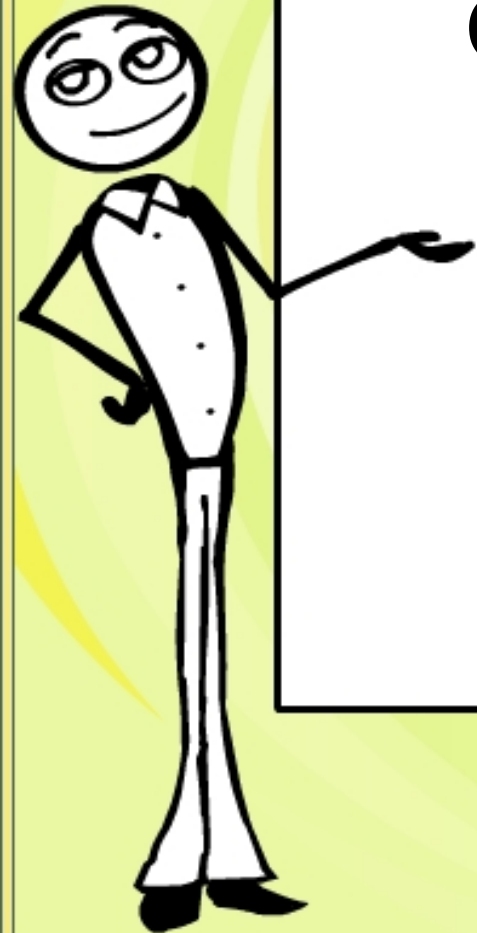
Taking it to the Web

How We Used Web-Based Training
Courses to Train the Masses

Session #10407

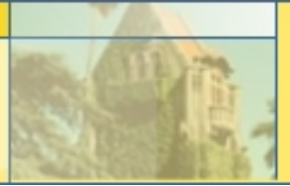
Tuesday, March 9 – 10:30 am

HEUG 2004 Conference - Atlanta





Who we are

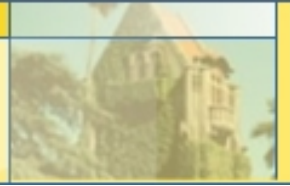


- **San José State University**
 - *Carrie Medders*
 - Coordinator, Training & Help Desk
- **Synaptis**
 - *Tyler Wood*
 - Project Manager
 - *Mona Henderson*
 - Products and Support Manager





Who we are

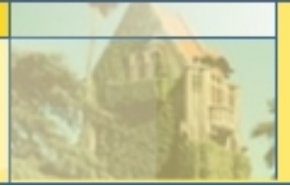


- **San José State University**
 - Silicon Valley's metropolitan university
 - Approximately 30,000 students
 - Oldest institution of public education on the west coast
 - One of 23 campuses in the California State University system





Who we are



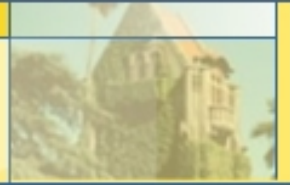
- **Carrie's News & Notes**

- 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





Systems status

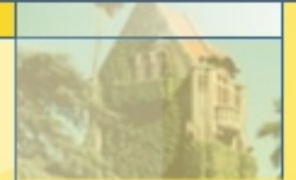


- **HRSA 8.0**
 - Live on CSU Baseline HRSA Apps
 - Administer & Recruit Workforce, Time & Labor, Base Benefits, Self Service
 - Admissions, Records, Financial Aid, Student Financials, Academic Advising, Self Service
 - Users
 - 400+ staff users
 - 2,000+ faculty users
 - 30,000 student users
 - 20,000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





Systems status



- **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

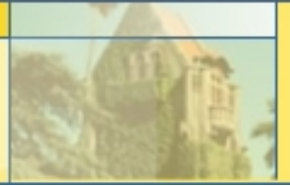
- **PeopleSoft Portal**

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





Who we are



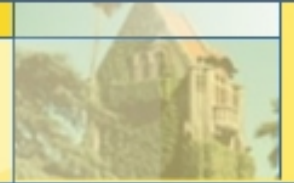
- **Synaptis**

- Specialize in creating practical & effective learning solutions
- Extensive experience in complex business applications (PS HR, HRSA, Financials, CRM)
- Providing products, services, and support for:
 - Needs Assessments
 - Business Process Documentation
 - Change Management
 - Web-Based Training
 - Instructor-Led Training
 - On-the-Job Support





The training team



- **SJSU**
 - In-house Training and Help Desk Department
 - Majority of materials developed in-house
 - Do all ILT delivery in-house
 - Now developing our own WBTs

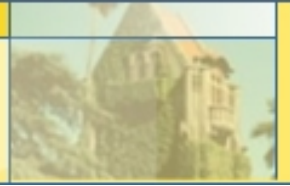


- **Synaptis**
 - Creates and hosts custom WBTs
 - Creates custom online help
 - Provides tools for SJSU in-house development



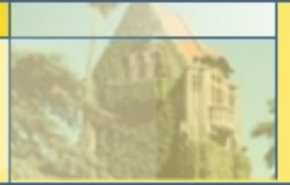


Our training & support approach



- **Early approach we carried forward**
 - Combined training and help desk into one team
 - Cross-trained trainers
 - Continued with streamlined communication
 - ListServes to communicate with campus users
 - Web site to communicate FAQs/documentation
 - Email and phone Help Desk support
 - Online system to track help desk tickets



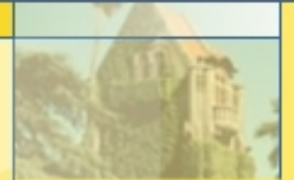


- **How did we train them all?**
 - Introductory Training
 - Hands-on and via the web
 - Go-Live Training
 - Mostly instructor-led and hands-on
 - Students/Faculty
 - Not required
 - Documentation via email and portal
 - Help Desk support





Our training & support approach

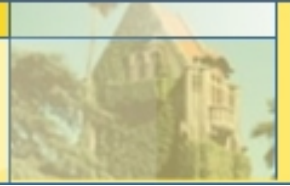


- **A blended approach...**
 - One-size training never fits all needs!
 - Be creative! You never know what will work!
 - Blended doesn't have to mean high dollars!





Our training & support approach

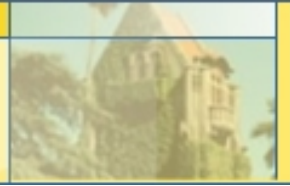


- **Blended training...**
 - Use ILT where you need it
 - Use WBTs whenever possible
 - One-on-one training/coaching
- **Blended support...**
 - Portal, help desk & web
- **And anything else that helps!**
 - Open labs





Instructor-Led Training (ILT)

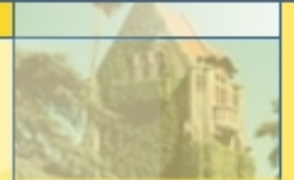


- **Best for complex processes & central staff**
 - Multiple scenarios/situations that may cause the process to differ; better explained in person
 - Central staff is small; better use of time & budget to deliver training in person
 - Great for Go-Live
 - Can handle change management, team building
 - Important to give in-person feedback
 - Builds confidence for Go-Live!





Web-Based Training (WBTs)

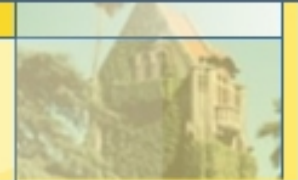


- **Intro's can replace ILT Intro's (reduces ILT costs)**
 - Mousing and Keyboarding Fundamentals
 - Web Basics
 - Introductions (2) for PS 8 HR & PS 8 SA
 - Introduction for Finance 8.4
- **WBTs for distributed audiences**
 - Custom HR Reporting
 - SJSU's Finance Web Component
 - Receiving
- **Great for ongoing maintenance**
 - Ideal to convert ILT courses (see tools)
- **Ability to track users of WBTs as well as classes completed**



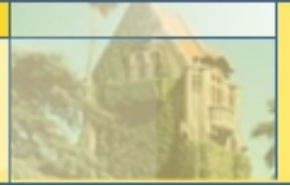


Web-Based Training (WBTs)



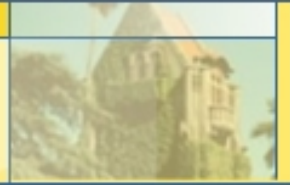
- **Developing our own WBTs**
 - Organization
 - Develop template for trainers to complete
 - Content
 - Assessments
 - Demos needed
 - Macromedia Flash
 - Develop demos
 - What we've learned
 - Need Flash experience and time to develop
 - Need time to create content
 - Less expensive money-wise, but very time consuming





- **Quick Steps online help**
 - Available from the web site
 - Context-sensitive, accessed using Help link
 - Clear, concise directions for a specific task or demo
- **Help Desk support**
 - Dedicated phone & email with full-time staff to answer
 - All trainers are backups to answering calls



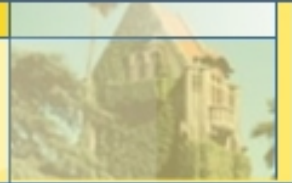


- **Portal**
 - FAQs
 - Quick Reference Guides
 - Detailed Process Guides
 - Important Information
- **Web site**
 - FAQs
 - Business Process Guides & Flowcharts





What about updating materials?

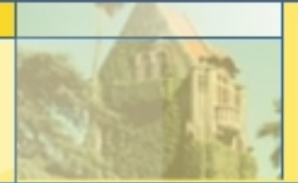


- **Any training toolset should allow for update/maintenance**
- **Development tools**
 - Ability to update/create WBTs via the Synaptis RDS
 - Ability to update/create ILT Guides using Microsoft Word
 - Ability to update/create Quick Steps through the Synaptis ActiveAuthor and RoboHelp (or Dreamweaver)
 - Synaptis Customization Workshop
- **Extra benefit**
 - Ability to create other material with the same look and feel
 - [Project web site](#)

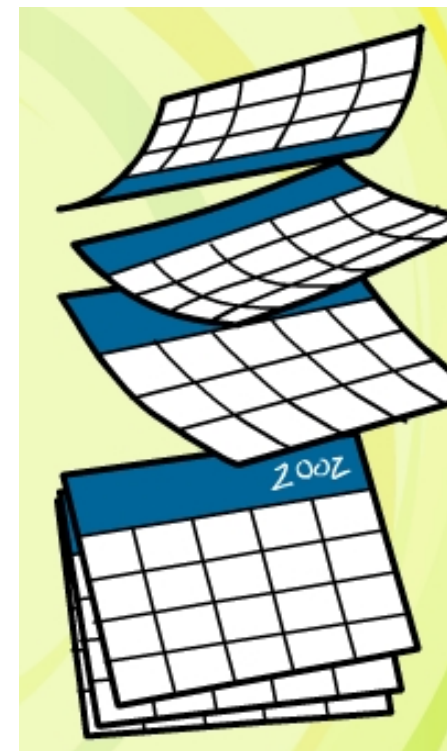




What about future plans?

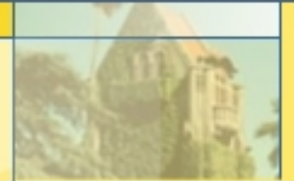


- Continue with blended approach for all products
- Plan for ongoing needs and future go-lives
- Advertise to staff & managers to encourage staff to take available WBTs & ILT
- Use Quick Steps for reinforcement of processes





Lessons Learned...

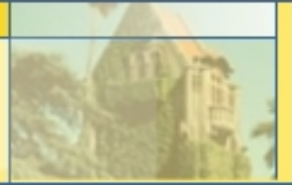


- Plan for all levels of users
- Blended approach works!
- Users responsive to both WBTs and ILT options
- Communication to users and managers
- Gain manager buy-in before training begins





Conclusion



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