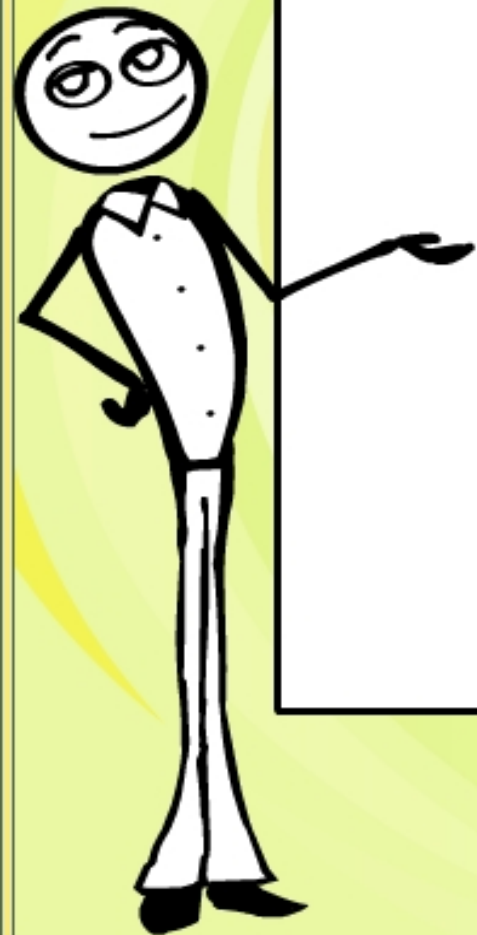


Training at San José State University: A Blended Approach

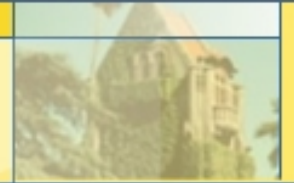
Session #34

Monday, March 17 - 1:15 pm
HEUG 2003 Conference - Dallas





Your presenters

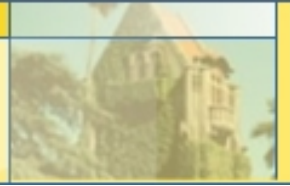


- **San José State University**
 - *Carrie Medders*
 - Coordinator, Training & Help Desk
- **Synaptis**
 - *Tyler Wood*
 - Project Manager
 - *Mona Munroe*
 - Products and Support Manager





Who we are

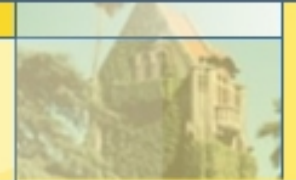


- **San José State University**
 - Silicon Valley's metropolitan university
 - Approximately 30,000 students
 - Oldest institution of public education on the west coast
 - One of 23 campuses in the California State University system





Who we are



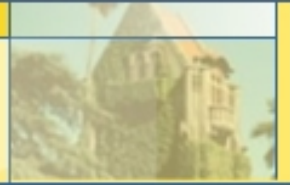
- **Carrie's News & Notes**

- Almost seven years of experience with PeopleSoft versions 6.0, 7.6, and now live on 8.0 mostly working with the HR modules. Also experienced with Finance and SA.
- Background in HR -- primarily in Class/Comp
- Member of the CSU systemwide baseline team
- Loves the NBA, singing, shopping, and watching TV and movies





Who we are



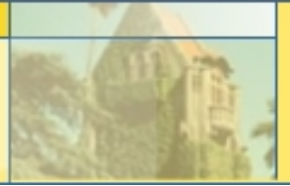
- **Synaptis**

- Specialize in creating practical & effective learning solutions
- Extensive experience in complex business applications (PS HR, HRSA, Financials, CRM)
- Providing products, services, and support for:





Who we are

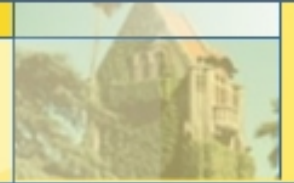


- **Tyler's News & Notes**
 - Seven years of experience providing training & support for end-users (delivering ILT and making WBTs)
 - New Dad! [See the picture of my cute baby?](#)
- **Mona's News & Notes**
 - Six years of end-user training experience, but I'm now focused on creating tools so our customers can opt to create materials in-house...
 - Getting married in just a few months!





The training team

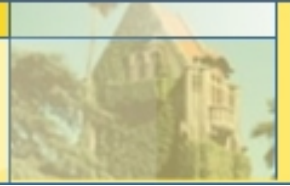


- **SJSU**
 - In-house Training and Help Desk Department
 - Majority of materials developed in-house
 - Do all ILT delivery in-house
- **Synaptis**
 - Creates and hosts custom WBTs
 - Creates custom online help
 - Provides tools for SJSU in-house development





Systems status

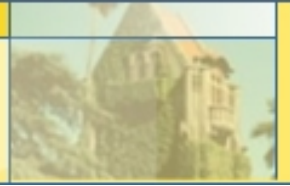


- **HRSA 8.0**
 - Live on CSU HR and T&L Baseline Apps
 - Beta testing T&L self service
 - Live on CSU Admissions and SA Data Warehouse
 - Records, Financial Aid, Student Financials and Advisement scheduled to go live throughout 2003
- **Financials 7.5**
 - Live on CSU GL, AP and PO Baseline Apps
 - Custom web component
 - Custom Oracle data warehouse





Our training & support approach

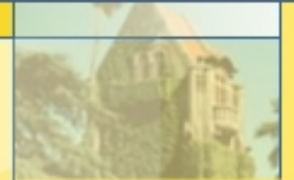


- **Early approach we carried forward**
 - Combined training and help desk into one team
 - Cross-trained trainers
 - Continued with streamlined communication
 - ListServ to communicate with campus users
 - Web site to communicate FAQs/documentation
 - Email and phone Help Desk support
 - Online system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





Our training & support approach



- **Lessons learned from 7.5 HR & Finance**

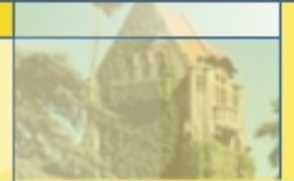
- ILT isn't required for all topics/all users

- Adds complexity: Depends on a working, scrambled training instance
- Adds development time: Continuously reworking guides with database updates
- Not easy to support just-in-time training for ongoing maintenance
- Many users learn better at their own desk/speed rather than in a group





Our training & support approach

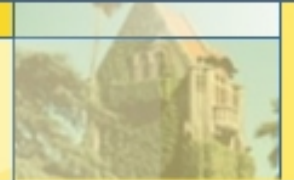


- **A blended approach...**
 - One-size training never fits all needs!
 - Be creative! You never know what will work!
 - Blended doesn't have to mean high dollars!





Our training & support approach

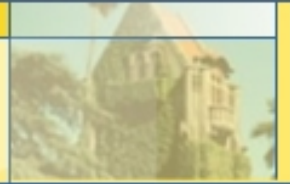


- **Blended training...**
 - Use ILT where you need it
 - Use WBTs whenever possible
 - One-on-one training/coaching
- **Blended support...**
 - Online Quick Steps (QS)
 - Help desk & web site support
- **And anything else that helps!**
 - Open labs





Instructor-Led Training (ILT)

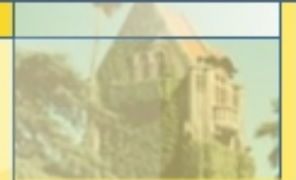


- **Best for complex processes & central staff**
 - Multiple scenarios/situations that may cause the process to differ; better explained in person
 - Central staff is small; better use of time & budget to deliver training in person
 - Great for Go Live
 - Can handle change management, team building
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



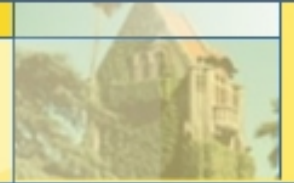


Web-Based Training (WBTs)



- **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
- **WBTs for distributed audiences**
 - Custom HR Reporting
 - SJSU's Finance Web Component
- **Great for ongoing maintenance**
 - Ideal to convert ILT courses (see tools)
- **Ability to track users of WBTs as well as classes completed**
- **Demos**



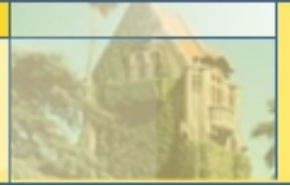


- **Quick Steps online help**
 - Available from the web site
 - Context-sensitive, accessed using Help link
 - Clear, concise directions for a specific task or demo
- **Help desk support**
 - Dedicated phone & email with full-time staff to answer
 - All trainers are backups to answering calls
- **Web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





Lessons learned...

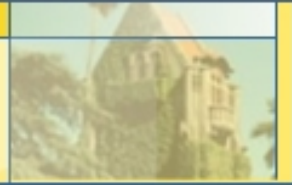


- Plan for all levels of users
- Blended approach works!
- Users responsive to both WBTs and ILT options
- Communication to users and managers
- Gain manager buy-in before training begins





What about updating materials?

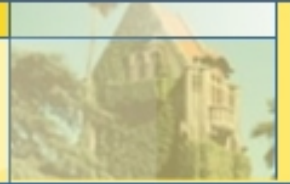


- **Any training toolset should allow for update/maintenance**
- **Development tools**
 - Ability to update/create WBTs via the Synaptis RDS
 - Ability to update/create ILT Guides using Microsoft Word
 - Ability to update/create Quick Steps through the Synaptis ActiveAuthor and RoboHelp (or Dreamweaver)
 - Synaptis Customization Workshop
- **Extra benefit**
 - Ability to create other material with the same look and feel (ie, non-PeopleSoft Purchasing WBT)
- **Demos**

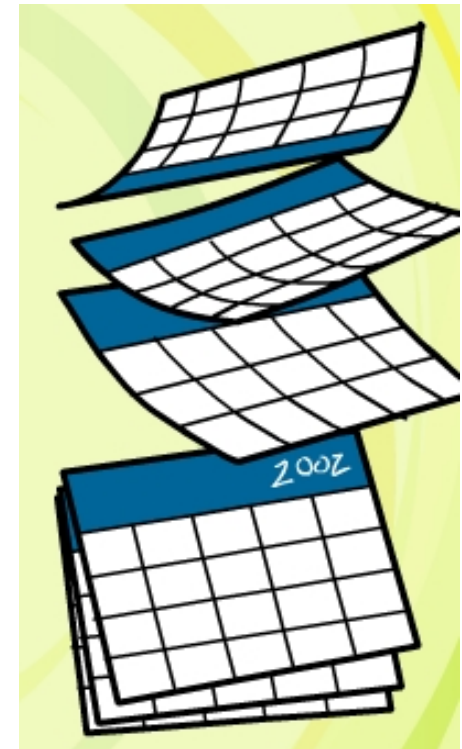




What about future plans?

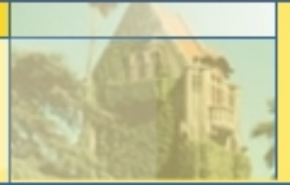


- Continue with blended approach for SA
- Plan for large, distributed audiences (students & faculty)
- Advertise to staff & managers to encourage staff to take available WBTs & ILT
- Use Quick Steps for reinforcement of processes





Conclusion



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(Attendees may download HEUG 2003 presentations from the archives at this location.)

