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System(s) Impacted: Strategies

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Preface

San Jose State has implemented several modules of both the PeopleSoft Finance and Human Resources systems. To date, 560 people have been trained with over 2100 individual classes completed. While go-live training is complete, on-going training will be conducted throughout the life of the project. This will include classroom training and one-on-one individualized training as appropriate. The purpose of this document is to outline the philosophy and scope of the continuing training effort for the San Jose State University CMS PeopleSoft implementation, with specific information related to the Student Administration implementation and the Human Resources upgrade. In addition, it will identify user types, the training team, communication efforts and how training relates to security.

Philosophy

As many studies have shown, training is best done as close to a go-live date as possible in order for end-users to maintain a firm grasp of what they learn. With this in mind, San Jose State will continue to use a just-in-time training philosophy. For the initial implementation, users will be trained 4-6 weeks prior to go-live. On-going training will occur throughout the life of the project and classes will be offered regularly to meet the needs of new users, or current users requiring additional instruction.

San Jose State's training team will also be part of the Help Desk support team once the software is live. This philosophy has proved effective in our recent implementations and should continue to be the best way to serve our end-users. The idea behind this is that our trainers begin with process analysis, then develop and deliver the training, thus learning every aspect of the various processes they oversee. This will give them the ability and knowledge to best answer the inquiries to the Help Desk.

Purpose

The purpose of end-user training is to equip our employees with the skills to perform their jobs after the implementation of the PeopleSoft software. While several hundred end-users will have knowledge of the product and how it works, there are many that will have little to no exposure to the system outside of the training environment. It is critical to provide detailed instruction to all users in order for the implementation to succeed.

Scope

The following modules have been implemented and go-live training completed:

Finance
- Purchasing (go-live June 1, 2001)
- Accounts Payable (go-live July 2, 2001)
- General Ledger (go-live July 2, 2001)

Human Resources (go-live July 2, 2001)
- Manage Positions
- Recruit Workforce
- Administer Workforce
- Manage Labor Relations
- Report Regulations
- Base Benefits
- Temporary Faculty
- Time & Labor
- Labor Cost Distribution

The following modules are being implemented for Student Administration, and training will take place for all affected users:

Student Administration (go-live October 2002, subsequent go-lives to follow, full implementation by October 2003)

- Admissions
  - Recruitment (go-live October, 2002 – training to begin August 2002)
  - Student Admission/Matriculation (go-live October 2002 – training to begin August 2002)
- Records (initial go-live April 2003, with supplemental go-lives through September 2003)

Training to begin on or near go-live as campus processing does not begin until after the go-live dates

  - Student Registration (go-live May 2003 – training to begin March 2003)
  - Grading (go-live August 2003 – training to begin July 2003)
- Advising (initial go-live October 2002, with supplemental go-lives through June 2003)
  Training to begin on or near go-live as campus processing does not begin until after the go-live dates
  - Transfer Credit (go-live October 2002 – training to begin September 2002)
- Financial Aid (initial go-live October 2002, with supplemental go-lives through June 2003)
  Training to begin on or near go-live as campus processing does not begin until after the go-live dates
  - ISIR Loads (go-live October 2002 – training to begin September 2002)
- Student Financials (initial go-live April 2002, with supplemental go-lives through March 2003)
  Training to begin on or near go-live as campus processing does not begin until after the go-live dates
  - Post Application Fees (go-live October 2002 – training to begin September 2002)

Human Resources Upgrade (go-live August 2002)
Upgrade training will take place for all modules as well as an additional delta course to introduce the campus to the new version of the system. See the HR Upgrade Training Strategy document for more information.

Users

The Training Coordinator and the functional leads will identify central processors, end-users and super (or power) users. It is anticipated there will be an additional 350 users of the system with the implementation of the Student Administration system.

Central Processors

- These are the individuals who will complete central processing of paperwork for various functions. Typically, these individuals will be in central departments: Accounting, Business Operations, Human Resources, Faculty Affairs and Enrollment Services. These users will undergo more training than a typical end-user and may, in some situations, become subject matter experts to assist end-users through the implementation.

End-users

- These are the daily users of the system outside of central departments. They will input data, add data and run reports. Some may have access to write and run queries. Access will be limited based on department and the specific tasks they are responsible for. A portion of these users will have view-only access. They are still considered end-users, but do not have the ability to input data into the system.

Super/Power users

- These may also be daily users of the system, but they have also been identified as individuals with increased knowledge and skill level. They will have a higher level of access in order to perform more tasks or assist others as appropriate. They will also have the ability to correct data when necessary. We would like these users to be pre-Help Desk point people; assisting those in their areas with processes and functions of the software.

Training Team

The training team consists of the following individuals:

- Coordinator and Trainer: Carrie Medders
- Process Analysts/Trainers:
  - Jim Cellini
  - Nancy Day
  - Jill Gran
  - Kristina Hernandez
  - Linda Loucks
- Training & Help Desk Support
  - Ryan Campbell
  - Jill Gran
- Desktop Training: Systems & Technology

Who does what?

- **Carrie Medders** – Coordinate training courses, schedules, documentation and communication; develop and deliver on-going Human Resource training; develop and deliver HR upgrade training
- **Jim Cellini** – Analyze Student Admin processes and develop fit-gap documentation; develop and deliver on-going Student Admin training, specifically Financial Aid; develop and deliver on-going change management workshops
- **Nancy Day** – Analyze Student Admin processes and develop fit-gap documentation; develop and deliver on-going Student Admin training, specifically Records
- **Jill Gran** – Analyze Student Admin processes and develop fit-gap documentation; develop and assist in the delivery of Student Admin training, specifically Admissions; maintain CMS web site; coordinate training delivered by PeopleSoft
- **Kristina Hernandez** – Analyze Student Admin and Financial processes and develop fit-gap documentation; develop and deliver on-going Finance training, specifically Procurement and Accounts Payable processes; develop and deliver on-going Student Admin training, specifically Student Financials
- **Linda Loucks** – Analyze Financial processes and develop fit-gap documentation; develop and deliver on-going Finance training, specifically Central Accounting and HR/Finance integration processes; develop and deliver on-going report training; develop and deliver applicable HR upgrade training
- **Ryan Campbell** – Administer training database; maintain training documentation and all training supplies
- **Systems & Technology staff** – Develop and deliver training to campus technical support staff which will enable them to install and support the PeopleSoft software, as well as other CMS-related software, across campus

Additional individuals with specific expertise may be asked to assist in the delivery of training as appropriate.

Documentation

A training guide will be developed for each session, and will incorporate navigational information with specific process data. Each session developed will also have associated business process guides that will be part of the training materials. The idea is for the trainee to use the process guide as a step-by-step tool for performing the specific process.

In addition, quick reference guides will be developed to give users a quick guide for the most used processes.

All process guides and quick reference guides will be made available on the CMS web site. Updates to documentation will be made electronically with notification given to all users so they may review and/or download the revised information.

Training Sessions

Hands-On Sessions

- Hands-on sessions will range from 2 hours to 12 hours, with the 12-hour sessions being divided into 3 4-hour sessions so an employee does not have to be out of their office all day. The sessions will be designed to give a basic overview of the software and the specific process; the instructor will walk through processes and the class will have the opportunity to practice what they've learned with a variety of exercises. There will be ample time made for questions during and at the end of each session. Certificates of Completion, along with an Operator ID and password will be given to all that complete the session.

- Sessions will be instructor-led with an emphasis placed on class participation. Learning will be hands-on in one of the CMS dedicated training rooms. The instructor will utilize a variety of instruction methods in order to give the students the best learning environment possible. The class size shall never exceed the number of PCs available in the training room.

- Pre-requisites will be defined for each session as appropriate. An introductory 2-hour navigational session will be offered for individuals who have had no exposure to the software.

- Trainees will have the opportunity to evaluate each session they attend. This evaluation will be designed to gather information about the instruction, the information provided and give the trainee an opportunity to provide input to the training group.

Hands-Off Overview Sessions

- Some topics and audiences may be better served with hands-off overview sessions. For example, several managerial overview courses were offered in this manner for the Finance and HR implementations, and they proved to be beneficial for those that attended. Some of these sessions may be followed by hands-on open labs to assist end-users in processing live data with the assistance of a qualified trainer.

Future Sessions

- It is anticipated that future sessions of training will be held via CBT (computer-based training). These would be refresher type courses or basic introductory sessions that would not necessarily need an instructor.

Post Implementation Assistance

Open Labs

- We realize that a number of our users may need additional help and assistance after the software goes live. We will have scheduled time in one or both of the training rooms for users to come and practice with on-site assistance from power users and/or trainers. This will be a time for users to refresh their memory on training they may have had several weeks before, and will also give them an opportunity to ask questions they may not have thought of during the training sessions. This will also be a time to bring real work for data entry into the system with the assistance of a qualified trainer. This scheduled time will be posted on the CMS Web Site, and will continue as long as necessary to meet the needs of the user community.

Refresher Courses

- We will offer refresher courses on various topics as appropriate. We will determine what these will be based on calls and inquiries to the CMS Help Desk. These sessions may be pared down versions of the full course focusing on those areas that have brought about the most questions or a combination of several courses in order to best serve our end-users.

Communication

CMS Web Site

- The CMS Web Site will be a prime point of communication for training. All classes will be listed on the web, and employees will be able to register via the web through the web-enabled Registrar technology. We will list recommended course tracks and define which classes are appropriate for various types of job tasks.

Managerial Contact

- Managers of central departments will be contacted to discuss the various elements to be included in training in order to ensure buy-in for their employees and customers to attend the appropriate training.

CMS Information ListServ

- A ListServ has been created for communication to all end-users. This method will be used to communication additions of training classes, changes in processes and any other information related to the CMS implementation.

Tracking Enrollment/Attendance

Registrar, software designed specifically to track training information, will be used to track classes, enrollment and attendance. The software allows printing rosters, schedules, employee training history, mailings and on-line monitoring of class enrollment so as not to exceed size limits.

Promotional Give-Aways

In an effort to get both the CMS and PeopleSoft name spread in a positive manner, promotional give-aways will be a part of every training session. Each trainee will receive a PeopleSoft mouse pad in their first class, which gives quick reference information on some of the basic keystrokes in the system. Trainees will use these in class and then be able to take them back to their office.

In addition, we will have notepads and pens for each trainee to use during the first training session and take back to their office upon the completion of the session. We will also have “toys” for all to have at the end of the sessions. These will be things like key chains, stress balls, tangles, etc. All give-aways will have either the PeopleSoft logo or the San Jose State CMS logo on them.

Training & Security

As mentioned previously, no one will receive security access without completion of the appropriate training session(s). The Training Coordinator will work directly with the Security Administrator to ensure this policy is strictly followed.

Security forms are available on the CMS web site, and are also distributed as appropriate during training sessions. Based on the training, and in conjunction with the functional leads, the Training Coordinator will indicate which access should be granted and sign off as having completed the class. The end users will be responsible for obtaining the required managerial signature, with the understanding that no access will be granted until the forms are complete. Once the form is complete, with signatures, it should be forwarded to the Training Coordinator who will review the completed training and the requested access. The Training Coordinator will then assign the appropriate operator classes and forward the form to the Security Administrator who will assign operator IDs and temporary passwords. The operator IDs and temporary passwords will be communicated to the users via e-mail, with instructions that the user needs to change the password at their first log in.