

TRAINING STRATEGY

PURPOSE

The goal of this training strategy is to ensure that all participants have the necessary knowledge of the PeopleSoft system by the completion of the current project. To achieve this:

- the end-users must become self-sufficient in the operation and maintenance of the PeopleSoft software;
- the implementation team members must become experts in the operation and maintenance of the PeopleSoft software; and
- the steering committee members must have a solid knowledge of the PeopleSoft modules that are being implemented.

We will accomplish this by providing all users with complete training on how the system functions and how the employees interact with the system to perform their jobs. The training strategy has been broken down into three different target groups: end-user training, implementation team training, and steering committee training..

End-User Training

End-user training will extend over all phases of the project. We will train all Brandeis University employees with access to the PeopleSoft system through *role analysis*, and *curriculum design and enrollment*, and with *training materials*.

Role Analysis

The goal of *role analysis* is to ensure that the right people are fully prepared to receive the training that is most relevant to their jobs. Role analysis includes:

- Organizing future PeopleSoft users into groups that must have the same expertise in using the PeopleSoft system.
- Identifying the most effective communication channels used by target employees, in order to use these channels in training.
- Implementing a communications plan that motivates and prepares individuals to be trained for their role in the future PeopleSoft-driven environment.
- Identifying pre-requisites for PeopleSoft, such as Windows, Excel, Word, Query, nVision, and Crystal.

Curriculum Design and Enrollment

The *curriculum design and enrollment* tasks follow from the role analysis. Once roles are defined, we can develop courses and formulate a delivery plan.

Training Material

All classroom training should be supported with training material that progresses from a general overview to specific practices within the PeopleSoft system. At a minimum this will include:

- Instructor guides - Printed, step-by-step guides describing relevant business processes and demonstration of PeopleSoft transactions.
- Classroom exercises - Step-by-step procedures that instruct the student to enter specific field data and navigation commands.
- Applied exercises - “Real World” scenarios and supporting data to be completed by end-users to ensure that they understand how to use the PeopleSoft system in realistic work environments. This data will reflect Brandeis University rules, account numbers, vendors and so on.
- Online support system - Windows help files that reflect the Brandeis University system’s specific business processes and PeopleSoft configuration.

Implementation Team Training

Certified PeopleSoft instructors in off-site classes, and on-site PeopleSoft contractors will provide knowledge transfer to the implementation team through their insight into the functional processes and technical workings of the software. We will reinforce the implementation team’s classroom training with actual hands on use of the system during the prototyping and development stages of the project.

The training provided to the implementation team will include both functional and technical classes. The depth of training provided should be such that core implementation team members will be able to operate and maintain the system using Brandeis University Systems resources. The implementation team will form the nucleus of the Brandeis University super-users and trainers for the end-user community.

Steering Committee Training

We will provide training to the steering committee to give them a solid understanding of the PeopleSoft product that is being implemented. This training will include functional overview classes, and a technical overview class for those interested.

TRAIN THE TRAINERS

Key personnel will not only learn to use PeopleSoft, but also to train other personnel to use PeopleSoft. This strategy is expected to provide a number of benefits:

- Department leadership will assume ownership of PeopleSoft.
- Brandeis University trainers will understand the details of the PeopleSoft system more thoroughly.
- Training will include representative business examples.
- We will have personnel equipped to train newly hired employees throughout the life cycle of the system.

Training instructors will attend courses that teach effective communication skills and familiarize them with the instructor's guide that has been prepared for the courses they will teach.

TRAINING CURRICULA

Brandeis University will prepare three kinds of training curricula.

- End-user training will cover the topics that allow them to complete their daily processes -
 - an introduction to working in PeopleSoft, and
 - courses geared specifically to G/L, A/P, P/O, Budgeting, Grants, and Reporting, from a day-to-day operational point of view.
- Implementation team training will have three tracks -
 - a functional track, which will cover application specific courses – G/L, A/P, P/O, Budgets, Grants, Report Writing using PS Nvision, Query/Crystal;
 - an application technical track which will cover PeopleTools, the inner workings of the PeopleSoft product, including table, panel, page, and menu design, security, SQL, and SQR; and
 - a maintenance and support technical track which will cover the PeopleTools, Data Management Tools, Configuration and Administration, Unix, and SQL.
- Steering committee training will cover overview sessions in Introduction to Financials and Distribution, HRMS Overview, PeopleTools Overview, Introduction to Student Administration.

USING THE TRAINING

Whenever possible we will have employees trained “just in time.” In other words, employees will be able to return from training and immediately use their new knowledge.

- Implementation Team members will use their knowledge during the fit-gap analysis sessions.
- Implementation Team members and End-Users identified for testing will use their knowledge in the testing phases of the project.

TRACKING TRAINING AND CERTIFICATION

We will track all training given to an end-user. Upon successful completion of the end-user training class an attendee will receive a Certificate of Completion. All end-users must attend training. They will get access to the system only upon successful completion of the appropriate courses. An end-user's manager will be responsible for assuring that the access being granted is in line with the completion of the training requirements.

TRAINING ENVIRONMENT

The training facilities remain to be determined. The training room must allow the training team to walk between rows to view student screens.

All sessions require the following:

- one PC equipped with Windows and PeopleSoft per student (to a maximum of 12 students),
- an overhead projector and projection screen,
- a LAN connection and LAN printer,
- a white board, flip charts and markers, and
- class documentation.

Each class will require several sessions. The number and length of sessions will be determined after completion of the role analysis and curriculum design and enrollment elements.

The training database will require its own security and backup and recovery procedures. The training team will develop scripts for use in class. The rules tables and account tables will be Brandeis University specific tables.

TRAINING ISSUES

The following are training issues:

- space,
- employee release time to attend training sessions,
- timing (training must be close to implementation)
- distribution of training materials (print versus web)
- access to the training database outside of training sessions, and
- distribution of PeopleSoft desktop software.