

RELEASE 1 END USER TRAINING PLAN

Summary

The users of the University of Houston System Financial System must be prepared for PeopleSoft General Ledger General Ledger for Education and Government 7.5 when it is deployed as the university's financial system. Recognizing that end user training is the most critical element of that preparation, the FAST Project will provide the means for the user to be trained for a successful transition from FRS and the basis for training beyond the transition period and for the introduction of additional applications.

The number of users to be trained, the level or class of those users and the training needs of each level of user have been taken into consideration in the preparation of this End User Training Plan. The appropriate classes and training tracks have been identified or designed on the basis of this basic data. The design of training material and other training support is included in the training plan task list, as is the identification of training facilities and the selection and training of trainers. Each of these elements is further discussed in the sections that follow.

Additionally, the range of users and the need for both initial familiarization and on-going support have been recognized in the selection of training tools. To date, those methods of training delivery that have been identified as appropriate for this project include:

- initial broad-based presentations to both select and large groups
- large group orientations on specific aspects of the application
- tutorials on use of specific aspects of the application
- on-line support material
- distributed user support documentation

There are many decisions that must be made over the next few months regarding training in UHS implementation of PeopleSoft General Ledger. This plan contains a number of assumptions, conclusions and recommendations and is intended to will provide a basis for the discussions among those that will be making those decisions.

Training Locations

Three options for training locations are under consideration. The centralization of training at a single site would provide the advantage of consistent training and minimize duplication of resources. There are, however, a number of disadvantages to a single site that must be considered. A second option would be the provision of training on-site at each component. (Note that for training purposes the University of Houston and University of Houston System Administration are considered a single site.)

Disadvantages to wholly decentralized training include the need to identify redundant resources. The third option would be a training design wherein both on-site training and centralized training are provided where each is the most efficient and appropriate means of delivering the necessary instruction. These options will be discussed by campus contacts/representatives, and a recommendation will be made to the Project Oversight Committee as to the most appropriate location plan.

Identification and Classification of Users

Users of University of Houston financial information have been classified into eight categories for purposes of designing and providing training in the use of PeopleSoft General Ledger.

1. GL Users (on-line) – Those users who currently access financial information through on-line inquiry, primarily for purposes of checking balances or confirming transactions.
2. Local Reporting Users – Those who use the on-line capabilities of the current financial system to produce reports for local use.
3. Data Entry Personnel – Those whose job responsibilities primarily consist of traditional data entry tasks.
4. Local Entry Preparation (on-line, forms) – Those whose job responsibilities include the preparation of a significant volume of accounting entries. While legacy practice requires this function to be forms based, Release 1 will enable some portion of this function to be completed on-line.
5. Power Users – A subset of class 2 users, consisting of those whose job responsibilities require expert use of financial system capabilities.
6. Management – University executives or senior management who do not access information directly from the financial system but whose responsibilities require an understanding of the system.
7. General Ledger Report Users (hard copy) – Those whose source of financial information is printed and distributed reports.
8. Trainers – Individuals selected to provide training to other users.

The current on-line users of the University of Houston System financial system were identified through the tracking of actual use for the period September 1 through December 31, 1999. This tracking will continue for the balance of the implementation as a means to keep the user list and thus the training needs current.

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Through a survey of those users conducted by the Financial Advisory Group leadership, these 612 UHS employees were assigned to user class 1, 2 or 3. The breakdown of this classification, by campus, is summarized below.

User Class	NUMBER OF USERS				
	UH/UHS	UHCL	UHD	UHV	TOTAL
1. GL Inquiry (online)	235	56	68	27	386
2. Local Report Creation	141	13	10	4	168
3. Data Entry	26	21	9	2	58
	402	90	87	33	612

This count will be used to determine the training resources that will be needed to meet the demand for initial user training. In addition, an assumption was made that those with few (or fewer) uses of the financial system would not need as intensive a training experience as those with more uses. As a result the 1A: GL Inquiry and 1B: GL Inquiry as well as the 2A: Local Report Creation and 2B: Local Report Creation user classes have been proposed, where those classified as A- level users have fewer than a specified threshold number of FRS instances over the four month data collection period and those classified as B- level users used the financial system more than the specified threshold. Several scenarios have been developed (appendix A) and will be used in curriculum design decisions.

Identification of those to be included in user classes 4, 5, 6, 7 and 8 is underway. It is expected that those in classes 4: Local Entry Preparation, 5: Power Users and 8: Trainers are now included in classes 1 or 2, so no significant change to the total user count is expected as a result of those classes. The count of those in user classes 6: Management and 7: GL Report Users is expected to increase the total. The impact of any increase is described in the description of classes and training tracks and component training needs.

Class and Training Track Descriptions

This training plan proposes that ten training classes or courses be designed and presented to prepare the various users for the transition to PeopleSoft General Ledger. The following terms are used in the discussion of course planning:

- Course is an area of instruction, such Orientation.
- Class is an organized offering of a course. There will be multiple classes for each course.
- Session is a class meeting. Some classes will have a single session to accomplish the instructional purpose. Others will have two or more sessions or meetings. Sessions may be half-day or full-day, depending on the course.

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The relationship of the courses to the user classes is summarized in the following matrix.

User Class	Training Classes									
	1. Orientation	2. Management Overview	3. Navigation /InquiryDemo	4. Navigation /Inquiry Hands-on	5. Reporting Demo	6. Reporting Hands-on	7. Data Entry Hands-on	8. Creating Journals Hands-on	9. Forms Completion Demo	10. Distributed Reports Demo
1A:GL Users (on-line, light use)	R	--	R	--	--	--	--	--	O	R
1B GL Users (on-line, moderate use)	R	--	--	R	--	--	--	--	O	R
2A: Local Reporting Users (light use)	R	--	R	--	R	--	--	--	O	R
2B: Local Reporting Users (moderate use)	R	--	--	R	--	R	--	--	O	R
3: Data Entry Personnel	O	--	R	--	--	--	R	--	R	--
4A: Local Entry Preparation (on-line)	R	--	--	R	--	--	R	R	R	R
4B: Local Entry Preparation (forms)	R	--	O	--	--	--	--	--	R	O
5: Power Users	R	--	--	R	--	R	R	R	R	R
6: Management	O	R	--	--	--	--	--	--	--	O
7: GL Report Users (hard copy)	O	--	--	--	--	--	--	--	--	R
8: Trainers	--	--	R	R	R	R	R	R	R	R

O - optional

R - required

-- - not required/not recommended

A summary of each of the courses is provided below, and includes a brief description of the expected outcomes, the method of instruction, the recommended class size, and the user classes that will be expected to participate.

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1. **Orientation:** The initial introduction to PeopleSoft General Ledger concepts and the University of Houston implementation of PeopleSoft.
Outcomes: Understanding of the relationship between legacy and PeopleSoft terms and business practices.
Method of instruction: Lecture/presentation
Class size: 50-100
Sessions: 2 half-day meetings
User classes: Required for 1A, 1B, 2A, 2B, 4A, 4B, 5.
Optional for 3, 6, 7.
2. **Management Overview:** An introduction to PeopleSoft General Ledger for university executives and senior management.
Outcomes: Understanding of the relationship between legacy and PeopleSoft terms and business practices.
Method of instruction: Presentation
Class size: 10-20
Sessions: 1 half-day meeting
User classes: 7.
3. **Navigation and Inquiry Demonstration:** Demonstration of the navigation through PeopleSoft menus, panel groups and panels. May be customized for specific user groups.
Outcomes: Knowledge of PeopleSoft navigation basis and use of specific panels for inquiry into PeopleSoft General Ledger.
Method of instruction: Presentation
Class size: 50-100
Sessions: 1 half-day meeting
User classes: Required for 1A, 2A, 3, 8.
Option for 4B.
4. **Navigation and Inquiry Tutorial**
Outcomes: Ability to navigate PeopleSoft General Ledger and inquiry on balances and transaction status.
Method of instruction: Tutorial (hands-on)
Class size: 24
Sessions: 2 half-day meetings
User classes: 1B, 2B, 4A, 5, 8.
5. **Reporting Demonstration**
Outcomes: Knowledge of navigation in PeopleSoft General Ledger and use of specific panels for as needed for reporting.
Method of instruction: Presentation
Class size: 50-100
Sessions: 1 half-day meeting
User classes: 2A, 8.

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6. Reporting Tutorial

Outcomes: Ability to navigate PeopleSoft General Ledger, access specific panels as needed for reporting and use basic reporting tools in PeopleSoft.

Method of instruction: Tutorial (hands-on)

Class size: 24

Sessions: 2 half-day meetings

User classes: 2B, 5, 8.

7. Data Entry Tutorial

Outcomes: Ability to navigate PeopleSoft General Ledger, access journal entry panels and enter data into the General Ledger.

Method of instruction: Tutorial (hands-on)

Class size: 24

Sessions: 2 full-day sessions

User classes: 3, 4A, 5, 8.

8. Journal Creation Tutorial

Outcomes: Ability to create journals for entry into PeopleSoft General Ledger, both on-line and on data-entry documents.

Method of instruction: Tutorial.

Class size: 24

Sessions: 2 full-day sessions

User classes: 4A, 5, 8.

9. Form Completion Demonstration

Outcomes: Understanding of use and purposed of forms related to PeopleSoft General Ledger.

Method of instruction: Presentation

Class size: 50-100

Sessions: 1 full day or 2 half-day sessions

User classes: Required for 3, 4A, 4B, 5, 8.
Optional for 1A, 1B, 2A, 2B.

10. Distributed Reports Demonstration

Outcomes: Understanding of distributed General Ledger reports and how to incorporate reports into departmental business practices.

Method of instruction: Presentation

Class size: 50-100

Sessions: 2 half-day sessions

User classes: Required for 1A, 1B, 2A, 2B, 4A, 5, 7, 8.
Optional for 4B, 6.

Determining Component Training Needs

The training contact(s) for each component, otherwise referred to as campus representative, will work with the FAST core team and in coordination with the contacts from the other components to determine the appropriate classification of PeopleSoft General Ledger users and to confirm its training needs. The components will work from baseline data provided by the project office to do so. While an overall expectation for training requirements will be developed, it is possible that a component may, because of differences in business practices or business organization, find it necessary to modify the composition of a user class.

An initial decision in training will be whether to use a threshold of FRS use to subclassify users. The scenarios developed from the initial list of general ledger users and the survey used to classify those users is attached. Campus representatives, again working the project office, are encouraged to review those scenarios to see if it is feasible and desirable to provide more demonstration than tutorial instruction to certain classes of user in order to provide a baseline of knowledge to the users while making the most efficient use of training resources.

Campus representatives are expected to provide a decision on this initial sizing so that training demand can be more accurately projected. The projected training demand will also drive the priorities set on development of specific training classes.

Identification of Training Facility Requirements

The issue of training locations (centralized or distributed) was presented to the campus representatives earlier in this document. While the resolution of this issue will determine the number and site of training facilities, the actual requirements of training facilities should be considered in the discussion so that the components and the project office may begin to identify potential facilities. The proposed curriculum includes two methods for presentation of training that require a classroom or laboratory.

The first is the demonstration or lecture, which would require a classroom or lecture hall facility. Classes using the demonstration or lecture method have been preliminarily sized at 50-100 attendees, with an average of 75 used to calculate initial course demand.. A facility for this type of instruction should therefore meet the following criteria:

- seating of 50 to 100 students
- capability of computer based projection and overhead (transparency) projection
- access to the campus network for availability of training database
- available for scheduling in half-day and full-day blocks

Tutorial or hands-on training requires that each student have access to a desktop computer so that actual exercises can be completed. The preliminary class sizing is 24 students. While an optimum class size would be 14, based on PeopleSoft experience, the

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need to meet peak demand during implementation suggests that 24 must be accommodated. Requirements for a facility to support tutorial training include:

- access to a PC for each student plus the instructor, or 25 computers
- all computers to be able to support the PeopleSoft application
- access to the centralized training database for each computer
- capability of projection of the instructor's computer screen
- availability of overhead (transparency) projection
- available for scheduling in half-day and full-day blocks

In addition to facilities needed to provide direct instruction, each component should also have a means to store and distribute printed materials and videotaped instruction, and a means to make on-line tutorials available to the end user.

Identification and Responsibilities of Trainers

The initial training of all users of the General Ledger will require a peak demand for trainers. In order to meet this demand, it is expected that each component provide a number of individuals to assist in the initial training and, to the extent desirable, on-going training in the application. The number of trainers needed by each component is to be determined by the sizing of user classes and component training needs. Campus representatives should review the timeframes of the training task list and consider the on-going business demands of the university when identifying potential trainers.

Trainers will be expected to assist in the development of training support materials, and, part of the development of expertise in the application, may participate in User Acceptance Testing.

Training Task List

A list and calendar of training related tasks has been developed and is attached.

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APPENDICES

1. Initial Survey of Current FRS Users
 - University of Houston/UH-System Administration
 - UH-Clear Lake
 - UH-Downtown
 - UH-Victoria

2. Class Sizing Scenarios
 - Scenario 1: Initial Hands-On Training for All Users
 - Scenario 2: Limited Hands-On (more than 10 FRS instances)
 - Scenario 3: Limited Hands-On (more than 20 FRS instances)
 - Scenario 4: Limited Hands-On (more than 30 FRS instances)

3. Training Task List – Release 1