FINAL
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Approved by ESC on 8/20/01

TRAINING PLAN FOR PROJECT FRESH

This paper outlines the plan that will be implemented to train end-users to operate the finance and human resource application software from SCT (Banner), and Web Intelligence reporting software. This purpose of this plan is to provide a detailed outline of the training initiative for Finance and WebI, and a high level overview for Human Resources. It will attempt to identify:

- Goals and Objectives
- Project Scope
- Training Methodology
- Assumptions
- Curriculum
- Delivery
- Infrastructure
- Roles and Responsibilities
- Timetable
- Support

The creation of a system-wide training plan is a collaborative effort requiring buy-in and approval of the Executive Steering Committee, campus VPs responsible for Finance and/or Human Resources, and ITPAC. This is a living document that will be reviewed and updated periodically.

GOAL AND OBJECTIVES

Goal

The goal for Project FRESH Training (PFT) is to provide end-users with the technical skills and procedural knowledge required in order to successfully complete the finance, human resource and reporting business processes of the organization in an effective and efficient manner upon go-live of Banner and Web Intelligence (WebI).

Objectives

- To acknowledge that each USNH institution has individual requirements and preferences and provide a training program that will meet the baseline needs, and by defining scope provide a clear indication of campus responsibilities for campus-specific training;
- To identify and deliver organizational change, navigation, concept and application training to end-users;
- To evaluate whether all end-users can be properly trained to meet respective go-live dates (1/1/02 for Finance and 7/1/02 for HR), and if not attainable, develop a plan that staggers training in such a way as to ensure that the core business functions of the organization continue seamlessly;

- Request confirmation that the technical environment to be in place at each campus for end-user training to be successful;
- Request confirmation that the technical environment to be in place for end-user access to Banner and Web Intelligence;
- To provide end-users with training documentation that is easy to understand and serves as a handy reference guide back in the department;
- To ensure that the training environment is conducive to effective learning;
- To ensure that the mechanism is in place to foster open communication between trainers and end-users;
- To evaluate the effectiveness of the training experience and provide end-users with a feedback mechanism to continually improve the delivery and success of the training initiative; and,
- To keep the morale of the training staff and end-users a high priority.

ROLES AND RESPONSIBILITIES

The roles and responsibilities of the primary participants in the PFT are as follows:

Roles

- Carol Powers has been named by the ESC as the Training Coordinator responsible for implementing the training plan;
- A Training Committee will be formed with the following membership. The bolded members will serve as key campus contacts.

Training Coordinator & HR Team	Carol Powers, Chair
Finance Team Representatives	Alice Samuel and Barbara Doane
Management Reporting	Jackie Snow
CIS Documentation & Training	Diane Byron, Donna Adjutant, and Amanda Riecks-Kurshinsky
CLL	**Kristie Camacho** and Meadow Cacciola
Keene State College	**Karen House**
Plymouth State College	**Judy Landry (for Finance)**, Barbara Fahey, Tamara Mahoney and **Terri Lessard (for HR)**
University of New Hampshire	**John Griffith** and Christina Van Horn
Project FRESH Administrator	Diane Cotter
Technical Liaison	Eve Fralick

- Team Leads for Finance, HR and Management Reporting will serve as liaisons between the work being done by their teams and the Training Coordinator;
- Key campus contacts will serve as liaisons between the Training Committee and the needs of their individual campuses.
- A technical coordinator will be named to ensure that the technical aspects of the training program are in place both within UNH and between UNH and the other campuses; and,
- The training plan must be approved by the ESC.

Responsibilities

Training Coordinator

- Report to Project Directors;
- Develop, gain approval for, and implement the training plan;
- Ensure that the training needs of the campuses and the business process owners are addressed effectively and timely;
- Coordinate and collaborate with the Finance, HR and Management Reporting teams and various internal and external service providers (e.g., SCT, CIS, HR Office, etc.) to plan and deliver appropriate training, documentation and support services; and,
- Receive and respond to critical feedback in a timely fashion to shape the delivery of the training program to meet the needs of Project FRESH and end-users.

Training Committee Members

- Advise Training Coordinator;
- Act as liaison between campus and Training Coordinator;
- Identifies end-users;
- May serve as key campus contacts for campus-specific issues (identification of end-users, registration and scheduling process, etc.);
- Identify functional trainers for each campus; and,
- Assist the Training Coordinator in communicating training decisions to respective campuses.

Team Leads – Each respective team

- Identify the functional 'lessons' to be taught;
- Identify the priority and timeline for these 'lessons';
- Identify functional trainers and end-users at UNH;
- Produce end-user procedures that can be turned into training documentation by CIS Documentation & Training group;
- Identify process team representatives who are able to attend training sessions to answer questions; and,
- Identify individuals who can serve as part of a support structure for end-user assistance.

Trainers

- Responsible for facilitating the training sessions.

Functional Experts;

- Responsible for attending training sessions as observers and answering any questions that the Trainers are unable to address.

CIS Documentation & Training

- Develops the end-user training documentation;
- Conducts end-user training sessions at UNH.

Technical Coordinator

- Serve as a member of the Training Committee;
- Work with key campus contacts to ensure training environment is ready on each campus in accordance to a timeline prepared by the Training Coordinator;

- o Ensure that the proper Banner release is in place to facilitate the training endeavor; and,
- o Ensure that the proper instances are in place to facilitate the training endeavor.

Executive Steering Committee

- o Review and endorse the training plan; and,
- o Receive regular updates on progress and advise Training Coordinator of critical issues.

SCOPE

The scope of PFT is defined as a training initiative that is confined to three months before and continues three months after the designated application go-live dates. See specific components of training curriculum and broad timeline below:

Finance Training (scheduled go-live 1/1/02)	
Preparatory Training (organizational change, train-the-trainer, concept & navigation)	September 2001
Application Training – Before Go-Live	October-December 2001
Application Training – After Go-Live	January-March 2002
WebI Early Adopter Finance Training-Accessing Reports	November
WebI Early Adopter Finance Training-Creating Reports	December 2001
Zero Admin Business Objects (ZABO) Training	November-December 2001
WebI Finance Accessing Reports-General Rollout	March 2002
HR Training (scheduled go-live 7/1/02)	
Preparatory Training Refresh	March 2002
Application Training – Before Go-Live	April-June 2002
Application Training – After Go-Live	July-September 2002
WebI HR Training	To be Determined

Once this training has been delivered, it is the responsibility of each USNH campus to design and implement a training program that will continue the effort started with the PFT initiative. In other words, PFT ends three months after the respective application go-live dates.

PFT needs to provide reasonable assurance that current CUFS and HUM end-users have sufficient knowledge and skill to operate in the new administrative environment created by the Banner and WebI software. The plan presumes end-users identified to participate in training will be the same employees who currently have access to CUFS and HUM systems. Legacy users are presumed to have a basic understanding of the current USNH business processes. This is a prerequisite for learning the Banner and WebI software environment since trainers are expected to make frequent references and comparisons between the legacy system and the Banner and WebI software.

While it is recognized that USNH institutions may want or need to offer campus-specific training, these initiatives are not within the scope of PFT and the trainers, resources and facilities identified for PFT are not generally available for this purpose. For example, if campuses identify end-users who are not currently CUFS and HUM users, it will be their responsibility to provide the foundational training that is critical for their successful understanding of the Banner products. Any training experience not mentioned in this plan is considered to be out of scope for the project FRESH initiative of the Long Range Technology Plan.

<u>Training Curriculum</u>

Typically, people are more willing to engage in an activity if it is not mandatory that they do so. However, Banner end-user training is so critical that USNH should consider requiring folks to participate in the appropriate training sessions. It is up to each campus to develop a strategy that works best with their culture. The invitation, and thus the perceived commitment, should come from the President and/or appropriate Vice President to encourage appropriate participation not only from the end-users but also from their supervisors.

The training curriculum for Project Fresh is as follows:

Finance Training:

- Organizational Change Training
    - CLL on 7/24/01 and 8/1/01;
    - PSC on 8/7/01 & 8/9/01;
    - KSC in fall;
    - UNH-M to attend session at UNH
    - UNH in fall;
- Train-the-Trainer Platform Training
    - September 12-14, 2001
- Train-the-Trainer Content Training
    - September 17-28, 2001
- Dry Runs and Walk Through Training
    - September 17-28, 2001
- Navigation Training
    - Weeks of 9/22/01; 10/20/01; 11/03/01
- Concept Training
    - September-October 2001
- Application Training (3 month before go-live)
    - October-December 2001
- Application Training (3 month after go-live)
    - January-March 2002

HR Training:

- Organizational Change training
    - March 2002
- Train-the-Trainer Training

- o March 2002
- Navigation Training
  - o Weeks of 3/18/02 and 4/1/02
- Concept Training
  - o April 2002
- Application Training (3 months before go-live)
  - o April-June 2002
- Application Training (3 months after go-live)
  - o July-September 2002

It should be noted that in addition to these formal training sessions, special working sessions will be scheduled for training that pertains only to central staff (i.e., Controller's Office, Purchasing, etc.).

Management Reporting Curriculum:

The MR training that will take place before Finance go-live will focus on Early Adopter training which is defined as a group of System-wide key users (about 50 people) who will be identified by FINPAC in late August, 2001. This group will learn both how to access and how to create reports. In March, 2002, training will be scheduled for any other Finance users who require access to WebI. The schedule for Early Adopter Training is as follows:

- Accessing Reports Training
  - o November 2001
- Creating Reports Training
  - o November & December 2001
- Labs for Above
  - o December 2001

Description of Training Curriculum Components:

PFT will offer the following types of training:

- Organizational Change Training
- Train-the Trainer Training
- Dry Runs and Walk Through Training
- Concept Training
- Navigation Training
- Banner Application Training
- WebI Training
- Practice Network and Legacy Backup

A. Organizational Change Training

Nothing has impacted such a wide number of University System employees as the decision to convert to the Banner and Web Intelligence products. The Project FRESH training experience will be very demanding. End-users will have to relearn how they do business – and at the same time continue with business as usual until the transition. It may be uncomfortable; it may be frustrating and stressful; but, most important, it will be vital for success. It will require employees who conduct the business operations of the University System to do their day-to-day job responsibilities differently. Many deans, directors, department chairs and PIs will eventually access financial and HR management information via the WebI tool. Ultimately, all employees will be affected as we change our business practices so that benefits enrollment and time and attendance records are kept via the web. As an institution, we need to acknowledge that this may be a very stressful transition for some employees, and we need to help our employees cope and adapt by offering change management training. Specifically, organizational change training should:

- Be offered at each individual campus in appropriately sized groups;
- Be offered before any other training is scheduled;
- Be facilitated by Nancy Puglisi for CLL, Keene, Plymouth and System Offices, and by David Butler for UNH and UNHM;
- Be offered in conjunction with campus HR offices; and,
- Include follow up in order to measure success.

While the theme of the course will be similar, the facilitators will have the flexibility of developing workshops that are suitable to their audience and reflect their own personal style.

Organizational change training sets the stage for all other training. Consequently, each campus should strongly encourage end-users to make attendance a priority. Since Banner Finance is scheduled to go live first, the financial end-users should be scheduled to attend organizational change workshops that will be slated for July, August and September 2001. These sessions should be held in reasonably sized groups to allow for comfort and feedback. Organizational change training is being scheduled through the specific campus HR office, and these offices should be encouraged to have a member of their staff attend the sessions at their campuses in order to observe first hand any issues or concerns.

The Human Resources application is been scheduled to go live on 7/1/02. A repeat of the organizational change workshops is scheduled for spring of 2002 (March/April) for HR end-users. This would be a good opportunity to recommend other attendees as appropriate and include any Finance end-users who missed the opportunity or would like to repeat the experience.

While out of scope for PFT, campuses should realize that in some areas or departments, the anticipated change could be so significant that it might impact the productivity and functioning of the individuals or the unit(s) to the extent that professional intervention may be necessary. Campuses should be prepared to address these situations with their own resources.

B. <u>Train-the-Trainer Training</u>

The Long Range Technology Plan states that training and consulting will be based upon a distributed support model. This means that training will be offered at each campus, and as such, by August 30, 2001, each campus should identify the functional and technical trainers who will be responsible for running the sessions. These individuals will be offered two types of training that will be offered at UNH.

Train-the-Trainer Training

Not everyone is comfortable facilitating training sessions. It is important to provide the folks who have been identified as trainers and functional experts with the platform skills necessary to boost confident and ensure that the training experiences are successful. Beth Lucas from SCT has been hired to run a train-the-trainer workshop. Two options are available – a two-day session or a three-day session. Attachment A is a proposed agenda for each of these sessions. The Training Coordinator:

- Work with the Training Committee to determine which session is offered and;
- Once determined, work with Ms. Lucus to develop a full course curriculum.

The individual campuses are responsible for providing their own staff to continue the local training and consulting requirements beyond the scope of the PFT plan (i.e., three months after the respective application go-live dates).

Content Training

The trainers are expected to facilitate the training sessions. The functional experts are expected to partner with the trainers by attending the sessions and answering any questions that are specific to the application training session being taught.   The Finance and HR teams need to identify a pool of people to serve as functional experts and to determine their specialty (i.e., buy/pay, chart of accounts, etc.). Once identified, it will be necessary to ensure that the functional experts are totally versed in their area of expertise. The Finance experts need to be identified by the end of July so that during the months of August and September, these individuals can work to obtain the Banner application knowledge they need by:

- Attending the appropriate process team meetings;
- Reading procedures and other documentation specific to their expertise;
- Reviewing the training tools; and,
- Taking advantage of other techniques as available.

It is the responsibility of the Training Coordinator and the Finance Team Lead (or designee) to ensure that the functional experts receive the training necessary to be successful.   In addition to the self-help training identified above, functional experts will be invited to participate in the Dry Runs and Walk Through Training described below in order to become fully acquainted with the training material that will be used for the training sessions. This training will take place at UNH during the last two weeks in September 2001.

C. <u>Dry Runs and Walk Through Training</u>

During the last two weeks in September, dry runs and walk through training will be scheduled to build the partnership between the trainers and functional experts. This time period will be used to review the end-user training material developed by the CIS Documentation & Training and Training staff and work out any questions regarding training presentation.   These sessions will be held at UNH.

D. <u>Concept Training</u>

Concept training is basic foundational training that provides the building blocks for application training. It describes the fundamental logic behind our business practices. Concept training is viewed as critical and essential for end-users of the Banner product. The Finance and HR teams are responsible for identifying the concept training that is in scope for Project FRESH. These teams are responsible for developing the training procedure and any end-user documentation that will be handed out at the sessions, and as such the CIS Documentation & Training team is not involved in any preparation work for concept training. This training is not hands-on and will be facilitated by the Finance or HR business process team experts in large lecture style settings. This training is considered to be a mandatory prerequisite for end-users identified to receive application training. The training will be held at each campus.

E. Navigation Training

Navigation training is designed to show end-users how to access Banner from their desktops utilizing the new USNH Web Gateway and network security logon, to acquaint them with the Banner product in general, and to illustrate how to maneuver though the Finance and HR applications. Navigation training will be facilitated by SCT, and all training material will be provided by SCT. The Training Coordinator is currently working with SCT to determine the version that USNH will have installed for Finance go-live to ensure that the training documentation is germane. All end-users who will be using the Banner application should participate in Navigation Training. This training is hands-on and will be held at the respective campuses.

F. Banner Application Training

The Finance and HR Team Leads will identify the training topics that need to be offered to end-users on the Banner application software. These topics form the core of the training experience, and definition needs to be provided to outline the lessons in a manner that will permit the creation of the appropriate training materials. The expectation is to ensure the essential core staff is trained for a seamless transition. The Finance or HR teams will provide information on how the training should be sequenced (what courses should be offered first, second, pre-requisites, etc.) so that training and classes are scheduled to maximize the learning opportunity. Application training will be divided into major categories. Training for Beginner and Intermediate courses (and any associated labs) will be held at the respective campuses. Expert and courses for Central Office staff will be held at UNH.

G. WebI Training

The WebIntelligence application will provide USNH end-users with web-based access to the Finance and/or HR management reporting environments. The training matrix identifies end-users who require access to these environments and indicates the desired access level. All WebIntelligence users will be able to run pre-formatted parameterized reports. Additionally, a subset of power users will be designated as report developers, for Finance and/or HR, and will be able to create their own customized reports. Furthermore, a limited number of ‘super-users’ will have access to the Zero Administration Business Object (ZABO) application and will be able to develop more complex reports and queries. Access Reports training will take place at each campus and Creating Reports and ZABO training sessions will be held in Durham.

H. Practice Lab and Legacy Backup

Each campus is responsible for developing and implementing plans that address the following two issues – Practice Network and Legacy Backup.

Practice Lab:

Each campus needs to provide a lab setting or similar environment where end-users can continue to practice what they have learned in the formal application training sessions. The sessions need to be facilitated by someone sufficiently trained on the application software so that questions can be answered without causing additional frustration. An example would be a lab setting held during the lunch hours two or three times per week during the month of December. Campuses should also encourage end-users to practice at their desks if that is a practical option.

Legacy Backup:

The VP responsible for Finance and/or Human Resources at each campus is responsible for ensuring that there is a mechanism in place to provide backup support and assistance with the day-to-day legacy workload while end-users participate in training. Attendance at training sessions will be higher if end-users are not worried about falling behind in their responsibilities. Campuses should consider various techniques to help alleviate stress and anxiety; examples include, but are not limited, to the following:

- Remind campuses that they have backstop money to offer overtime to end-users so that training and legacy work can be accomplished. It is not the intent to raise expectations that all campuses will have sufficient backstop money available to offer this option, but rather to list this as but one strategy that might be available;
- Hire temp positions to handle high-volume or data entry work in both the legacy system and Banner. This option is only available if there is sufficient Project backstop money;
- Encourage deans/directors/department heads to be understanding and supportive of a decrease in productivity due to Banner training; and,
- Understand the window of stress and pressure; namely, three months before through three months after application go-live dates.

ASSUMPTIONS

This training plan is built on the following assumption:

Assumptions:

- That there will be one or more executive sponsors at each campus who will publicly support and endorse the training initiative (i.e., the campus ‘champion’ of Banner training);

- That, consistent with the Long Range Technology Plan, each campus will identify staff to serve as on campus trainers, and who will attend the PFT 'Train-the-Trainer' sessions in Durham;
- That each campus will ensure that the technical components are in place for training to be successful (reserving existing training labs, Banner on desktops, help desk, etc.); and,
- That each campus will be assume responsibility continuing Banner training when FRESH responsibility ends as indicated in the PFT timeline.

CURRICULUM

The curriculum of the PFT plan consists of the following components:

- Course Content and Description
- Documentation
- Resources

Course Content and Description:

The Finance, HR and MR2 teams are responsible for identifying the concept and application course content that will provide the end-users with the information they need to successfully use the Banner and WebI products. Each team has been asked to complete a matrix that will serve as a preliminary inventory of training requirements. The first draft of the finance matrix is complete and can be found in Attachment B or by accessing the following link on the server:
file:\\louise\user\system_replacement\Training\Matrix\Training Matrix.xls
Details for the Finance and MR2 programs are provided below. The HR team is currently working on completing the matrix to identify their training options and is expected to complete their section by the end of September.

The Finance team has identified three concept training sessions that are prerequisites to the application training tracts being offered. An example would that an end-user would enroll in Buy/Pay Overview if scheduled for Buy/Pay training. The sessions are as follows:

- General Finance – Conversion Strategies and Bridge Work
- Chart of Accounts – Banner Introduction and Foundational Definitions
- Buy/Pay – Buy/Pay Overview

The Finance team has identified application training that can be grouped as follows:

- Beginner Courses and Associated Labs
    - Requisitions
    - Purchase Orders
    - Associated Labs for above
    - Invoices-Regular Invoices-Adjustment, Credit Memos, Querying
    - Invoices-Direct Pay, Travel, Personal Reimbursements and Querying
    - Associated Labs for above
    - Buy/Pay Documents, On-Line Query Tools

    - Accounting/Budget Concepts, On-Line Query Tools
- Intermediate Courses
    - P/A Card Transactions
    - Accounting Document Processing -not Buy/Pay (Journals, Cash Receipts, JV/CR Approvals and Querying
    - Budget Processing
    - Document Processing Lab
    - Introduction to Research Accounting for Sponsored Programs
- Expert and Central Office Courses
    - Central Buy/Pay (Processing Purchase Orders, Table/Form Maintenance, Payment Processing and Printing)
    - Central Office Training for Grant Users
    - Grants Billing
    - IN Document User Training
    - In-Depth Discussion of Two-Ledger System/Accounting Process

The MR2 training courses include:

- Accessing Reports via WebIntelligence – All users
- Developing Reports via WebIntelligence – Advanced Course
- Developing Reports via ZABO – Expert Course

<u>Documentation</u>:

Finance, MR2 and HR will be responsible for developing procedures as part of their team deliverable. These procedures can serve multiple purposes, one of which is to provide the material needed for end-user training documentation. The CIS Documentation & Training staff is responsible for turning the procedures into end-user training documentation. It is very important to note that if the procedure templates are not turned out in a timely fashion, the end-user documentation will not be ready for the training initiative. The Finance, MR2 and HR teams will do the following:

Finance, MR2 and HR teams will:

- Submit the procedure to the CIS Documentation & Training staff using their standard template (note that the teams will be developing the documentation for concept and some application training courses);
- Provide a contact person to work with the CIS Documentation & Training Staff;
- Provide the CIS Documentation & Training staff with a rough timetable for rolling out the documentation;
- Provide the CIS Documentation & Training staff with the sequence order of all training experiences (i.e., for a typical end-user identify the first training exercise, the second, etc.); and,
- Ensure that document reviews are signed off by the chair of the business process team, the team leader or designee.

CIS Documentation & Training staff will:

- Work with the Finance, MR2 and HR team on the development of a template for processing procedures;

- Provide a responsible person for each piece of documentation;
- Provide a first draft timetable for processing the documentation;
- Ensure that document reviews are done by the responsible person in a timely manner;
- Use the opportunity to learn about the Banner product; and,
- Take responsibility for copying, assembling and distributing the end-user documentation once the training lesson has been approved by all parties (costs to be borne by Project FRESH).

Resources:

The people who know the most about the Banner and WebIntelligence products are the process team members. It will be necessary to identify a pool of individuals that can teach the end-users the Banner products. End-users should have the benefit of a partnership of technical and functional experts so that the ‘how’ and ‘why’ procedural and processing questions can be answered at the same time.

The Long Range Technology Plan states that training is based upon a distributed support model. Each campus must assume responsibility for identifying technical trainers who will come to Durham to attend ‘train-the-trainers’ classes, and who will provide the primary application training support to each campus. The trainers will facilitate the training sessions, and be accompanied by a functional expert (preferably a member of the relevant business process team) so that the majority of the functional questions can be answered during the training session. The expectation is that as the trainers become more knowledgeable on the product, the need for a functional representative to be present at all training sessions will diminish. The decision to phase out functional representation will be made by the technical expert, functional expert and the Team Lead.
It is expected that there will be a shortage of functional experts for available for Banner training as these are the same people who are also turning out the procedures, installing the product, testing, initiating WebI reports, and carrying on the daily business in the legacy system. On the technical side, the CIS Training and Documentation staff is responsible for preparing the training documentation, preparing the end-user handouts, learning about the Banner product, and are the folks who should be targeted as the best technical resource to provide the training with the functional representative(s) as support.

Attachment C is a matrix that summaries the curriculum and attempts to define trainers, content length, class size, site, and campus specific responsibilities. It will be the responsibility of the Training Coordinator to work with the Training Committee to complete this matrix by August 15, 2001.

DELIVERY

Delivery of the training plan will consist of the following components:

- End-users
- Account Creation
- Course Registration

- Facilities
- Training Materials
- Assessment Tool

End-users:

While USNH shares common business policies and procedures, individual campuses have different practices dependent upon their culture. Consequently, some campuses are very centralized in some functionality, and others are very decentralized. This provides a unique challenge in setting up training for FRESH because the end-user can range from a casual user to a high-volume producer.

The Training Coordinator will work with following key campus contacts, or designee, to solicit a final list of Finance end-user by August 1, 2001:

- CLL – Erik Blumenthal (Finance and HR)
- Keene State College – Karen House (Finance and HR)
- Plymouth State College – Judy Landry (Finance) and Terri Lessard (HR)
- USNH System Offices – Gaynelle Pratt (HR) and Melanie DeZenzo (Finance)
- University of New Hampshire – Business Service Centers and Pat Madsen for Central Offices

These individuals will be current CUFS and HUM users (see “Scope”). It is recognized that the Controller’s Office and USNH HR Office will review the list and provide feedback by August 30, 2001 for Finance and February 28, 2002 for HR. This is consistent with the procedure currently in place for establishing CUFS and HUM accounts. Once endorsed by all parties, these names will be considered the approved end-users. It will be a working list – with additions and deletions processed as people are hired, terminate service, or their roles within the institution change because of reclassification, promotion, etc. It will be the responsibility of the key campus contacts to communicate changes to the Training Coordinator and who will keep the list current.

Account Creation:

The new Banner environment will require that new network, database, and application accounts be created prior to commencement of training. A list of users and their roles will need to be defined by the appropriate functional team. CIS will create the network, database accounts, and the pre-production application accounts using data supplied by the functional teams. Passwords will be distributed to the users at an appropriate time during training.

Course Registration:

The Training Coordinator will invite end-users to register for the organizational change, concept and application training that have been identified as in scope for Project FRESH. Each campus is responsible for working with the Training Coordinator to set up a master course registration and training schedule that should take into consideration the following:

- The master course registration training schedule should ensure that the key central staff at each campus are sufficiently trained to ensure that the business practices of the institution operate as seamlessly as possible;
- Training should be sequenced so that the end-users receive the training in the proper order (organizational change training, navigation, concept training and application training);
- Registration should match the objectives that each key campus contacts have for training the staff at their institutions;
- No department should be completely shut down unless it is the express request of a Key Campus Contact; and,
- Every effort should be made to design training sessions to take advantage of synergy within like departments or units.

Once decisions have been made regarding training topics, groupings, etc., the registration process needs to take place. The Training Coordinator, working with the Training Committee, is responsible for completing the following by August 30, 2001:

- Determining how each campus will conduct the registration process (electronically, manually organized, etc.);
- Identifying the resources for the registration process (will be campus specific);
- Ensuring that CIS Training and Documentation has the dates, times and numbers so that end-user training materials can be ready for the training sessions; and,
- Ensuring that key campus contacts communicate the registration process to the end-users in a timely fashion so that supervisors can arrange for staff coverage.

Facilities:

Each campus will need to reserve an appropriate number of properly equipped training facilities in order to ensure that end-users have access to an adequately prepared training environment when needed. Training facilities and requirements are critically linked to available training resources and how courses are scheduled. In addition, the training facilities need to be set up with the proper Banner instance, for the WebI product, and sufficient testing needs to take place to ensure all technical requirements are in place. The Training Coordinator will work with Petr Brym and Bill Baber from Computing & Information Services to develop a list of specifications that can be distributed to each campus IT office. A preliminary list is expected to be complete by August 20, 2001. The final specifications are contingent upon the schedule for receipt, installation and testing of the Banner version that Finance is slated to use for go-live.

Training facilities are defined as:

- Properly equipped training labs that have access to Banner;
- Seminar or a large auditorium facility for concept training;

End-users should also be able to access Banner via the web from their office desktop in order to be able to continue to practice what they have learned in training.

At UNH, the training facilities that have been identified and booked for end-user training are as follows:

- Nesmith Hall Training Lab – Booked for Finance from October-December 2001; and January-March, 2002.
- Nesmith Hall Training Lab – Booked for HR from April-June, 2002; and July-September, 2002;
- Training Lab in Hewitt Hall – Booked with Banner training as top priority – other courses to be squeezed in only if room is available;
- Confirmed with Irving Canner that FRESH has full access to the Facilities Services new training lab (12 stations) in Nesmith Hall (Rooms 316 and 316A) for Banner Finance Training (PRISM training to be fit around Banner training). Lab to be fully equipped by Facilities Services and ready for September/October FRESH training; and,
- Requested space in MUB (theatre or equivalent space) for Organizational Change and Concept training (Sue Desrosiers to confirm).

It should be noted that FRESH is slated to move out of Nesmith Hall in the spring of 2002. It will be important to have a training lab at our new location, and considering that the Prism lab will probably be dismantled around this time frame, it might be appropriate to have two facilities. It will also be necessary to consider transportation from the core UNH campus to the Food Services Warehouse so that end-users can quickly and easily get back and forth from their offices to the training lab. The Training Coordinator will work with Diane Cotter on facilities issues, and Dirk Timmons on transportation issues.

At Keene, work with Karen House to identify by August 5, 2001, that the following training facilities have been booked:

- Rooms 13A, 14 and 15 in Huntress Hall – Space to be renovated (paint, carpet, wiring to reconnect access to campus network, and equipment – i.e., tables, chairs, computers) to meet the needs of Project FRESH training at Keene; specifically, space will be configured for a computer-lab type training facility and space for lecture-style training environment. Anticipate space to be available from 9/15/01 through Spring 2002.

At Plymouth, work with Judy Landry to identify by August 5, 2001, that the following training facilities have been booked:

- ITS Training Room has been reserved from October to March. This room is equipped with 13 PCs and will be used for all navigation and application training held at Plymouth.
- Location for Concept Training – Heritage Commons

<u>Training Material</u>:

Training documentation will be prepared as follows:

TYPE OF TRAINING	RESPONSIBLE GROUP
Organizational Change Training	Facilitators
Navigation Training	SCT
Train-the-Trainer Platform Training	SCT
Train-the-Trainer Content Trainer	Finance or HR Process Teams and/or SCT
Concept Training	Finance or HR Process Team
Banner Application Training	CIS Documentation & Training Staff (8

	lessons) and Finance Process Team (6 lessons)
MR2 Training	CIS Documentation & Training Staff

Concept, Application and MR2 Training will be developed using the same format style so that all end-user documentation is similar in appearance. Changes will be allowed to the version that will be used during Dry Run and Walk Thru training. However, documents will be considered 'final' one week before the first class. This will allow the CIS Training & Documentation Staff sufficient time to apply editorial changes, copy and assemble the training workbooks before the first class takes place.
The group responsible for preparing the training material will also be responsible for making sure that there are enough copies for end-users. The Project FRESH budget will pay for copies and binders. If campuses enhance this base training to include campus-specific information, it will be their responsibility to prepare this additional training material at their expense.

Assessment Tool:

The Training Coordinator will work with the Training Committee to develop assessment tools that will be used by end-users at the end of training sessions to evaluate the effectiveness of the training experience. Tools may vary depending on the type of training offered. This task should be completed by the end of August, 2001.

INFRASTRUCTURE

Infrastructure refers to the technical components of training. It will be the responsibility of each campus to ensure that the proper technical environment exists for training, and the responsibility of the Training Coordinator to ensure that the campuses receive the specifications for that to occur. Specific components of the infrastructure include:

- Hardware and software
- Training labs and seminar rooms
- End-user Desktops
- Instance Availability

Because most administrative users will be running not only Banner applications, but a host of other applications such as the Microsoft Office, Exchange and various others, the Project FRESH Technical Team recommends user desktops and training lab workstations have at least a Windows PC with 300 Mhz and 128 MB RAM on their desktop.

Note: SCT recommends that the minimum desktop standards required to run Banner finance and HR applications are a Windows PC with 166 Mhz and 32 MB RAM. Project FRESH does NOT recommend these standards, nor will these standards allow users to multi-task with other standard applications. Nonetheless, PCs of this minimal configuration have successfully run the suite of Banner applications in a test environment.

The Project FRESH Technical Team recommends that all Banner users continue to upgrade PCs routinely to keep pace with current PC standards, particularly in the training labs and for intensive users. More and more, Banner applications will take advantage of faster processor speeds. For those considering PC purchases, current standards (for the UNH campus) are posted and continually updated at www.unh.edu/cis/supported-products/.

In addition to PCs, each training lab should be equipped with an instructor station with an LCD projector. Whiteboards and flip charts will also be useful. As training will require prolonged focus for the better part of the days, we recommend the rooms be temperature controlled to maintain optimal performance of humans and machines.

TIMETABLE

In order to ensure that training is available within the dates defined in “Scope” (3 months before and 3 months after the respective Finance and HR go-live dates), the following timetable should be followed:

TASK	DUE DATE
Approved Training Plan	July 30, 2001
FINANCE TRAINING	
Develop Plan for Organizational Change Training (includes curriculum and facilitators)	Done (4/01)
Deliver Organizational Change Training	July, August & September, 2001
Develop Plan for Train-the-Trainer Training (includes curriculum for platform and content training)	July 31, 2001
Finalize Dry Run and Walk Thru Training Documentation	September 10, 2001
Deliver Train-the-Trainer Training	September 12-14, 2001
Deliver Train-the-Trainer Content Training	September 17-24, 2001
Deliver Dry Runs and Walk Thru Training	September 17-24, 2001
Develop Plan for Facility Preparation by Campus	August 15, 2001
Ensure Facilities are Prepared for Training	September 15, 2001
Develop Plan for Accounts	August 15, 2001
Ensure Accounts are Set Up for Finance Users	September 15, 2001
Develop Plan for Navigational Training	Done (6/01)
Deliver Navigational Training	Fall 2001 – 3 Weeks
Develop Plan for Material to CIS Documentation & Training	July 15, 2001
End-user Documentation Binders (CIS Doc Staff)	September 15, 2001
Develop Plan for Concept Training	Done (7/01)
Deliver Concept Training	Fall 2001
Develop Plan for Application Training	Done (7/01)
Deliver Application Training	October-December 2001 & January-March

	2002
Develop Plan for Management Reporting Training	July 30, 2001
Deliver Management Reporting Training	October-December 2001 & January-March 2002
HUMAN RESOURCE TRAINING	
Dates to be Established	

It is understood that in parallel to the timetable above, the Finance, HR and MR2 teams will be preparing additional end-user training material that will be used to train small groups of central office staff. The CIS Documentation & Training staff will not be preparing this material.

The above timetable maps out the training schedule for the Project FRESH initiative. If any of the institutions want to add campus-based training to this schedule, it is up to them to marshal this effort.

If these dates are missed, it will greatly impact the ability of Project FRESH to offer timely end-user training. For example, it is unrealistic to hold the CIS Documentation & Training staff accountable for delivering end-user training material in a timely fashion if the procedures are not given to them in accordance to the approved timetable. The Training Coordinator will meet with the Training Committee on a weekly basis to assess progress toward these goals and ensure all tasks are on target.

SUPPORT

In order for FRESH training to be successful, there needs to be in place a network for support so that after applications go live, end-users have resources they can access to help answer questions regarding:

- desktop equipment (why doesn’t my machine work, how do I log onto Banner, etc.); and,
- application software (how do I initiate a particular document, how do I initiate an inquiry, how do I use WebI, etc.).

It is the responsibility of each campus to establish such a structure and have it in place for application go-live dates. This work is considered to be outside the scope of the Project FRESH training plan.

ATTACHMENT A
DRAFT AGENDA
TRAIN-THE-TRAINER PROGRAM

TWO-DAY PROGRAM

BETH LUCAS, SCT, FACILITATOR

Day 1

9:00 a.m. – 9:15 a.m.	Introduction
9:15 a.m. – 10:15 a.m.	Personality Differences/Learning Styles
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 12:00 p.m.	Communication & Listening Skills
12:00 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:00 p.m.	Presentation Skills
3:00 p.m. – 4:15 p.m.	Break
4:15 p.m. – 5:00 p.m.	Impromptu Presentations

Day 2

9:00 a.m. – 10:15 a.m.	Topic Selection and Preparation for Presentations
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 12:00 p.m.	Presentation Preparation
12:00 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:00 p.m.	Presentations and Evaluations
3:00 p.m. – 3:15 p.m.	Break
3:15 p.m. – 5:00 p.m.	Presentations and Evaluations

ATTACHMENT B
DRAFT AGENDA
TRAIN-THE-TRAINER PROGRAM

THREE-DAY PROGRAM

BETH LUCAS, SCT, FACILITATOR

Global Government Solutions

Day 1

9:00 a.m. – 9:15	
9:15 a.m. – 10:15 a.m.	Personality Differences/Learning Styles
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 11:15 a.m.	Personality Differences/Learning Styles
11:15 a.m. – 12:00 p.m.	Communication & Listening Skills
12:00 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:00 p.m.	Communication & Listening Skills
3:00 p.m. – 3:15 p.m.	Break
4:15 p.m. – 5:00 p.m.	Attitude is Everything

Day 2

9:00 a.m. – 10:15 a.m.	Presentation Skills
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 12:00 p.m.	Presentation Skills
12:00 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:00 p.m.	Visual Aids/Interactive Exercises

3:00 p.m. – 3:15 p.m.	Break
3:15 p.m. – 5:00 p.m.	Impromptu Speeches

Day 3

9:00 a.m. – 10:15 a.m.	Topic Selection and Preparation for Presentations
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 12:00 p.m.	Presentation Preparation
12:00 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:00 p.m.	Presentations and Evaluations
3:00 p.m. – 3:15 p.m.	Break
3:15 p.m. – 5:00 p.m.	Presentations and Evaluations

ATTACHMENT C
CURRICULUM MATRIX

SEE SEPARATE EMAIL