



ABSENCE MANAGEMENT Training Strategy

Introduction

The purpose of this document is to outline the philosophy and scope of the continuing training effort for the California State University, San Bernardino CMS PeopleSoft Absence Management (HR) implementation specific for end-users. In addition, it will identify user types, the training team, and communication efforts and how training relates to security.

While the implementation go-live training is complete, on-going training will be conducted throughout the life of the CMS project. For the Absence Management implementation training may include instructor led, one-on-one individualized training, and on-line training. 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, CSUSB will continue to use a just-in-time training philosophy.

The ABSENCE MANAGEMENT implementation the Subject Matter Experts (SME) training began during the module development and testing phase (September 24, 2012) and will continue through November 2012. Utilizing the campus identified instance(s), testing, and working with the Chancellor Office representatives and campus Lead, training for San Bernardino's team (SME) will be made available as needed.

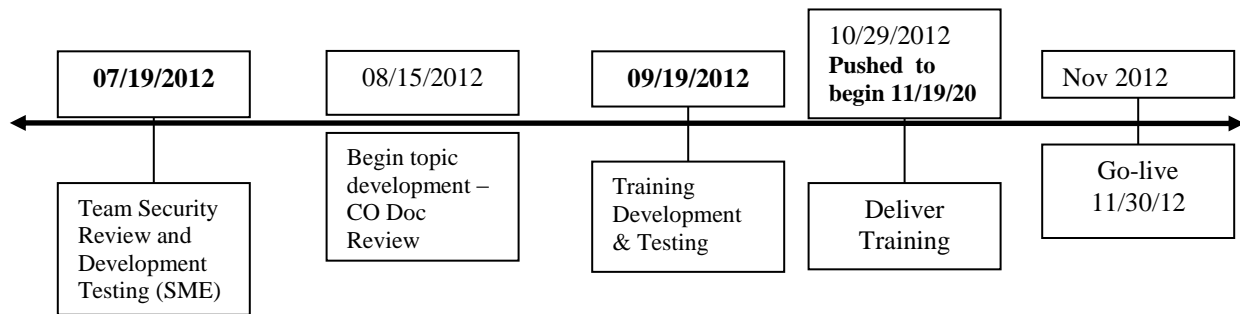
Time Keeper End-user training should begin approximately 3-6 weeks prior to implementation go-live, therefore training can begin the week of October 22, 2012 (**pushed out to November 19, 2012**). Staff user trainings will be made available approximately 3 weeks before go-live. On-going training will occur throughout the life of the project and training will be offered regularly to meet the needs of current and new users requiring additional instruction. In addition, the campus Data Support Help Desk team will be informed of the escalation process for AM technical/training and support calls. This will better assist the campus Data Support Help Desk with responding to end-user inquiries upon go-live.

The CMS CO (Chancellor Office) provides basic Business Process Guides(BPG) for campuses to utilize during implementations. CSUSB Absence Management BPGs will be established by the Team to include SME's and the CMS Training Support Office.

Purpose

The purpose of end-user training is to equip our employees with the skills to perform their jobs after the Absence Management implementation. While several 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 instruction to new users and provide Delta (basic navigation changes) for existing users for the implementation training to be successful.

The following timeline provides an overview of initial deadlines established by the CMS TSO to meet the training expectations of the project. Deadlines may change depending on delivery of the Training instance. It is anticipated that the Absence Management training instance will be made available by July 19, 2012.



Scope

Absent Management Implementation (go-live November 30, 2012)

Training (course) Types are defined as follows:

Open Labs/ Instructor Led - Complete overview of changes and step by step processes for specific modules concentrating on Time Keepers and Approvers. Employee time data validation training will be provided both Online and Open Lab.

OnLine – training(s) will be provided through Blackboard. The Blackboard Learning System is a comprehensive and flexible e-Learning software platform that delivers a complete course management system, permitting for a customized online course. Employee time data validation training will be provided both Online and by Open Lab sessions..

One on One – During the implementation One on One training will be provided as needed to staff members as appropriate. Training will be delivered by the area SME.

Instructor Led Delta – Delta courses provide an overview of specific changes in the system for specific modules.

Given that approximately over 1500 users are affected, and a quarter are existing HR users, in consideration of the knowledge base, it is anticipated that the transition to AM will be rather challenging. Employee time data validation training appears to be the most challenging task in this implementation given that most of these users have never used the system. Time Keepers while having an existing knowledge base will be introduced to new tools to better understand docs, catastrophic leaves etc.

The following list provides the categories identified/recommended for training. Specific course titles within each module will be defined at a later date.

List Modules:

Modules will change as the Team discusses training needs.

COURSE TITLE	On-Line	One on One	INSTRUCTOR LED DELTA	INSTRUCTOR LED
General Required Training				
Intro to HCM HR	√			
Information Security	√			
Absence Management				
Absence Management	√			√
Central Payroll*		√		√
Other (as needed)				√

Users

The following User categories have been identified

Subject Matter Experts (SME)*

- While the campus has identified specific SME's, they may be daily users of the system, and are identified with increased knowledge and skill level. SME's have a higher level of access in order to perform more analytical tasks which may include set up capability, correct data and assist others as appropriate. We would like these users to be pre-Help Desk point individuals(i.e. Central Payroll Staff /HR Lead/ CMS TSA/Department Leads); assisting users in their areas of expertise with processes and system functionality of the software.

End-users

- End-users are daily users of the system outside of central departments. We have three categories.
 - 1) Time Keepers
 - 2) Approvers
 - 3) Employees* (View Only)

Each of these categories will apply analytical skills to interpret data as needed for their specific roles in this implementation. *A portion of these users will have view-only access. They are still considered end-users, but may not have the ability to input data into the system.


Training Team

The training team consists of the following individuals:
These individuals may or may not deliver instructor led trainings.

Area	Name
Payroll	Teri Thoreson/Erica Youngblood
CMS HR Lead	Jenny Casillas
CMS Training Support Analyst	Doris Casillas

Responsibilities/Expectation of roles

Area	Responsibility
Payroll	Provide business processes & on-going training to Central Payroll and support campus Attendance Clerks.
CMS TSA	Provide support to Payroll with business processes & deliver on-going training both instructor led and on-line.

 CMS Training Support and Documentation office will provide support to each area for training courses, schedules, documentation and maintain PeopleSoft training data; deliver on-going training for processes. Additional individuals with specific expertise may be asked to assist in the delivery of training as appropriate.

Documentation

CMS Training Support and Documentation office provides accessible compliant templates required by the Chancellors Office. The CMS TSO will assist with updates as needed. Campus documentation standards are outlined in the following document http://cms.csusb.edu/support/user_guides.jsp

The purpose of the Business Process Guide's (BPG) is to be utilized and serve as a source of guidelines for Absence Management processes. The BPG where applicable will serve as the training document for both Central and Department staff.

The SME is the owner of the BPG and responsible for updating the document as needed with support from the CMS TSO. The SME is responsible for making certain that the most current version of the BPG is available on the R drive. The maintenance and availability of these documents on the R drive will ensure the accuracy of knowledge transfer.

Quick Reference guides will be developed by the SME (as needed) with CMS TSO primarily for end-users. The Quick reference guides will enable end-users to quickly find information resulting in a more effective processing of the specific module.

As appropriate, identified BPG's, and quick reference guides will be made available on the CMS web site.

Training Sessions (Dates forthcoming)

Training will focus on courses delivered to existing and new users. Training is required by all users. Sessions will be a combination of instructor-led, open labs and on-line training. All sessions will require registration (pre and on-demand). SME or representative will coordinate with CMS TSO to develop specific course objectives.

Instructor Led - A SME or representative will facilitate the course and deliver materials in a lecture classroom setting.

Open Labs - A SME or representative will facilitate the open labs providing additional support to user with daily processes.

On-Line - Offer an interactive learning experience utilizing Captivate and Blackboard in collaboration with SME/representative.

- Pre-requisites will be defined for each session as appropriate.

- Delta training will provide an overview of specific processes for existing users (identify basic navigation changes) and specific module enhancements.
- Trainees will have the opportunity to evaluate each session they attend. This evaluation will be designed to gather information about the instruction content.
- On-going training will be made available as needed.

Communication

CMS Web Site

- The CMS Web Site, CMSInfo and Campus listserves will be the primary point of communication for training.
- An email will be sent to all Existing MPWA Users with available training dates or on-line content.
- An email will be sent to all Approvers with available training dates or on-line content.
- An email will be sent to campus and a hard copy to employee departments who do not access email with training information to view their information using Absence Management.

IRT Support Help Desk

The IRT Support Help Desk is the first level of support for CMS. All inquiries will be escalated as needed to the area SME identified for Absence Management implementation.

Tracking Enrollment/Attendance

The campus monitors end-user training through the CMS Oracle training database.

Training Document Delivery

Training documents will be provided for the end user at the training session.

Security

Access to the Absence Management environment will be granted upon golive with the following criteria:

- Existing MPWA Users will not be required to renew the Computerized Information Access Request form (CIA) form. Access to Absence Management will be granted on golive date unless:

There has been a change of position/duties; department or role.

- **New users**

A new user to Absence Management is an employee who serves in the role of the Timekeeper who does not currently have access to the HCMHR PeopleSoft system.

New Users will need to follow required criteria as outlined at the CMS Training website. A Computerized Information Access Request form (CIA) will be required to gain access after training requirements have been met. Associated Signature Authorization Forms must be on file in Payroll indentifying the employees as either TimeKeepers or Approvers(Manager Role) as necessary.

New Users must follow existing security access protocol. If you have, any questions regarding Security access contact the Information Security Office at (909) 537-7262.

To prevent loss of access in Absence Management the User is responsible to meet the above required criteria.

If you have, any questions regarding training contact the CMS Training Support Office at (909) 537-7270.

For more information visit the CMS website at <http://cms.csusb.edu/index.jsp>