

HCM 9.2 Upgrade

TRAINING PLAN

HCM 9.2 Training Plan

VERSION HISTORY

Version Number	Implemented By	Revision Date	Approved By	Approval Date	Description of Change
1.0	Margo Kammeyer	11/6/2014			Initial draft
2.0	Sharon Wiemken	11/10/2014			Formatting changes
3.0	Margo Kammeyer	1/13/2015			Changes per initial Training Team meeting.
4.0	Margo Kammeyer	1/29/2015			Added additional training classes

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1.0 Introduction

This document will address the training requirements associated with the upgrade from HCM version 9.0 to HCM version 9.2. New features and functionality, as well as changes to existing functionality, will be introduced by the upgrade that will necessitate the creation of formal training plans in order to effectively reach those impacted by the changes.

1.1 Background and Scope

BGSU has established the PeopleSoft Road Map in answer to Oracle's published end of support dates for Extended Support of the PeopleSoft suite of applications. The Road Map consists of three phases, with each phase considered a separate project.

- Phase 1 – CSS / HCM Split was implemented July 19, 2014
- Phase 2 – HCM 9.2 Upgrade scheduled for implementation May 22, 2015
- Phase 3 – FMS 9.2 Upgrade projected for December 2015.

This document will focus on the Training Plan for Phase 2 – the HCM 9.2 Upgrade. The current HCM footprint at BGSU includes the following modules:

- Core Human Resources
- Benefits Administration
- Time and Labor
- Payroll
- Benefits
- Self Service

While some customizations have been added to the environment, core processes are used as delivered by PeopleSoft. The Talent Management modules are not implemented, with some of these activities performed by auxiliary applications such as Hire Touch.

A formal training strategy is necessary due to the introduction of several new features or functionality, and changes to existing functionality, with version 9.2. This training plan will be geared towards those users affected by these changes and will outline the various approaches that will be taken to communicate on the changes for each item in scope.

The specific scope of the training will focus on those areas that changed the most from HCM 9.0 to HCM 9.2, or those new functionalities that will affect the most users. They include:

- MSS (Manager Self Service)
- Time Approval
 - Delegation of Time Approval
- Life Events – eBenefits
- Secure Enterprise Search (SES)
- eHire

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- Employee / Dependent Fee Waiver
- Guest Access
- Security Requests

1.2 Points of Contact

The following members of the project team provided input into this Training Plan and can be contacted for additional information:

Role	Name(s)
Program Manager	Sheri Kellogg
Project Manager	Margo Kammeyer
Business PMs	Beth Ann Rife / Chris Cox
Development	Todd Glick / Mike Failor
Training Coordinator	Sharon Wiemken
Training Team	Lori Beeman, Heather Kowalski
Functional SME Core HR / Benefits	Beth Ann Rife / Jason Dunn / Sandra Heck / Heather Kowalski
Functional SME Time & Labor / Payroll	David Weimer / Shelly Smola / Raghu Chittari
Functional SME Student Employment Services	Michele Schmitz / Heather Kowalski
Communications Lead	Morgan Cranston

1.3 Document Organization

All training materials created for the HCM 9.2 upgrade will be publically accessible on the projects web site located at www.bgsu.edu/HABIT/training. Original copies of the training material will be stored in the project team's folder on the R drive located at PeopleSoft Road Map Projects/HCM92 Upgrade/05-Implementation/Training.

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2.0 Instructional Analysis

2.1 Targeted Audience

The below table details the targeted audience for each training course:

SCOPE	TARGETED AUDIENCE
MSS	Managers, Administrative Assistants
Time Approval	Managers, Administrative Assistants
Time Delegation	Managers, Administrative Assistants
Life Events – eBenefits	All Employees
SES	Users of MSS
eHire	Anyone hiring students
Fee Waivers	All Employees
Guest Access	Managers, Administrative Assistants
Security Requests	Managers, Administrative Assistants

2.2 Creating the Training Materials

Training material will be created by Sharon Wiemken, Lori Beeman, and Heather Kowalski. Input will be requested from the HCM 9.2 Upgrade project team in order to approve training content and deliverables.

Presentations will be delivered using Microsoft Power Point, Microsoft Word will be used to create the training documents, and Camtasia will be used to create the training videos.

2.3 Issues and Risks

The following issues, concerns, and risks have been identified associated with the HCM 9.2 training plan:

1. This upgrade has University-wide impact. Changes to existing functionality and the addition of new functionality will affect nearly all users.
2. It will be difficult to reach all affected users with the identified training strategies, simply because of number of users affected by the upgrade.

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3. Some users won't want to go to training, read the training documentation, or watch the training videos.
4. There could be an increase in the number of calls to the TSS following go live weekend.

3.0 Instructional Methods

3.1 Training Methodology

The training methodology used for this project will depend upon the audience, the audience size, and the specific topic. A variety of approaches will be used to train the user communities including using instructional videos, training documentation, and hands on demonstrations. In addition, Open Forums will be held to review all training items and the trainers will ask to be invited to department and group meetings in order to create more exposure to the changes. Our goal is to create as much exposure to the training material and HCM 9.2 upgrade features as we can. We will engage in a travelling roadshow to further our communications on these topics. There may also be the need for some one-on-one training which will be evaluated on an individual basis.

Communications on the training may be focused on, but not limited to the following:

- Campus Updates
- ASC Meetings
- Classified Staff Council
- Dean's Council
- Faculty Senate Meetings
- Department Meetings
- Direct communication with Chairs and Directors

The following training methods will be used for each scope item:

SCOPE	AUDIENCE	AUDIENCE SIZE	FORMAT
MSS	Managers, Administrative Assistants	704 / 126	Lab, Document, Instructional Video
Time Approval	Managers, Administrative Assistants	654 / 126	Document, Instructional Video
Time Delegation	Managers, Administrative Assistants	654 / 126	Document, Instructional Video
Life Events - eBenefits	Employees	2032	Document, Instructional Video
SES	Managers, Administrative Assistants	704 / 126	Document, Instructional Video
eHire	Managers, Administrative Assistants, Budget Admins	704 / 126	Document, Instructional Video
Fee Waivers	Employees	2032	Document, Instructional Video
Guest Access	Managers, Administrative Assistants	704 / 126	Document, Instructional Video
Security Requests	Managers, Administrative Assistants	704 / 126	Document, Instructional Video

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3.2 Training Database

A new database, HCM92TRN, will be created by the infrastructure team for the training. The existing development APP/WEB/Process servers will be used with the new training database.

During training, the training environment will be refreshed every Friday so that there is a clean environment for the next week's training classes.

Training will be conducted using 125 Training ID's. These training ID's will be used throughout the 7 classes conducted each week. Individual user ID's will not be used during the training classes.

3.3 Testing and Evaluation

After each hands-on training course, we will ask for a course evaluation in order to ensure we are meeting the needs of the audience. These evaluations will be used to modify the training as appropriate.

4.0 Training Resources

4.1 Course Administration

All training will be conducted by Sharon Wiemken, BGSU Trainer. Dates and times for training classes will be communicated using the Campus Updates, BGSU Portal, University Calendar, and by working with representatives from various University business offices and colleges.

Users will sign up for hands-on training using InfoPro and going to <https://infopro.bgsu.edu>. The user will register for the desired class and then will receive an email confirmation for the registration. The Trainers will then be able to produce a report detailing all registered users for each class.

For those scope items that do not have a hands-on training option, users will simply go to www.bgsu.edu/HABIT/training to view training documentation or instructional videos.

4.2 Resources and Facilities

All hands-on classes will be held in Hayes Hall room 203 computer lab. The training lab has room for 16 students. Each student will have their own computer and will be able to follow the trainer with hands on demonstrations.

The students will not need to bring any reference materials with them to class.

Handouts will be provided during the class for the student to follow along with the demonstration. In addition, the students will be emailed the link to the on-line instructional videos or documentation that they can print if they choose.

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Sharon Wiemken will conduct all hands-on training classes. There will also be a Functional Lead present at all classes in order to assist with the class and answer any questions. The Functional Lead could be Beth Ann Rife, Jason Dunn, David Weimer, or Michele Schmitz.

4.3 Schedules

The high level schedule and training milestones are as follows:

Training Database available	March 13, 2015
Training Scenarios Created in database	March 23, 2015
Training Material created:	
• MSS	March 20, 2015
• Time Approval and Time Delegation	May 22, 2015
• Life Events, eBenefits	May 22, 2015
• SES	May 22, 2015
• eHire	May 22, 2015
• Fee Waiver	May 22, 2015
• Guest Access	May 22, 2015
• Security Requests	May 22, 2015
Communications Plan created	January 30, 2015
Training Tests Conducted	March 23 – March 27, 2015
Training Classes Scheduled	February 6, 2015
Training Conducted	April 6 – May 15, 2015

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Classes have been scheduled as follows:

Training Course	Dates (April 6 – May 15 th)	Times / Location
MSS	M/T/W/Th	9-11am – Hayes 203
MSS	M/T/Th	3-5pm – Hayes 203
Time Approval	Wednesday	1-2pm – Olscamp 111

Hayes 203 Morning Dates (9-11am)

April 6, 7, 8, 9, 13, 14, 25, 16, 20, 21, 22, 23, 27, 28, 29, 30

May 4, 5, 6, 7, 11, 12, 13 14

Hayes 203 Afternoon Dates (1-3pm)

April 6, 7, 9, 13, 14, 16, 20, 21, 23, 27, 28, 30

May 4, 5, 7, 11, 12, 14

Olscamp 111 Dates (1-2pm)

April 22nd & 29th (call later if want May 6th)

4.4 Future Training

Requests for training beyond the schedule posted above will be considered as needed. At this time, no additional trainings are planned, however, all of the training material will be available at www.bgsu.edu/HABIT/training.

5.0 Training Curriculum

Documentation on all training topics can be found at www.bgsu.edu/HABIT/training.

These documents will be updated by the Training Coordinator.

The following items will be available for reference:

MSS	MS Word Document; Instructional Video
Time Approval	MS Word Document; Instructional Video
Time Delegation	MS Word Document; Instructional Video
Life Events - eBenefits	MS Word Document; Instructional Video

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SES	MS Word Document; Instructional Video
eHire	MS Word Document; Instructional Video
Fee Waiver	MS Word Document; Instructional Video
Guest Access	MS Word Document; Instructional Video
Security Requests	MS Word Document; Instructional Video

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APPENDIX A: Training Plan Approval

The undersigned acknowledge that they have reviewed the **HCM 9.2 Training Plan** and agree with the information presented within this document. Changes to this **Training Plan** will be coordinated with, and approved by, the undersigned, or their designated representatives.

Signature: _____	Date: _____
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