Transition Strategy Plan

TRAINING STRATEGY
Agenda

• Test Moves: Preparing for Training
• Preferred Training Methods
• Key Training Success Factors & Safety Nets
• Learning Strategy & Approach
  – Training is Required
  – Learning Approach
  – Learning Process Timeline
  – Learning Programs
  – Post Go-Live Support Resources

• Appendix A: Training Method Definitions
• Appendix B: Courses by Training Method
There are four planned Test Moves for a full 44 weeks of testing. The Test Moves build upon each other as we continue to refine the system.

- **TM1** and **TM2** focus on core existing functionality, new features, customizations and determining if approved business cases can be supported by the system.
- **TM3** focuses on communications with external applications.
- **TM4**, the Compass users get a chance to try out the system during interactive labs.
What we heard from you...

Preferred Communication Channels:

- Person-to-Person
- Email from Mgmt.
- Email from Listserv
- Webinars
- Project Website

Preferred Training Styles:

- Face-to-face (56.4% selected as most-preferred)
- Self-Paced eLearning (32.4% selected as most-preferred)

Please rank which coaching/teaching style is your preferred method in order of preference (where 1 is most preferred and 3 is least preferred).
Key Training Success Factors

**Management Support**
Management will encourage employees to complete all training activities as scheduled.

**Make it Count**
Training goals added to performance review plan. Accountability starts at the top.

**Leverage Emory Tools**
Using ELMS for registration & tracking, and assigning learning paths.

**Extended Reach**
Setting up classes across Campus for reach, Sessions are recorded.

**Learning Starts Early**
Learning process begins in Test Move 3 (March) & Test Move 4 (June).

**Right Number of Resources**
Enough classroom instructors for training delivery. Subject Matter Experts at all labs.

**Leadership Support is Key**
Leadership will be accountable for training completion in their respective business units.

**One Size Does Not Fit All**
Separate users into heavy vs non-heavy while remaining flexible for nuances.

**Organized Learning Approach**
Compartmentalizing the training topics by week to support success of scheduling, communications and advertising, efficiency of the instructors, community of practice and focus. A train-the-trainer approach.
LEARNING STRATEGY & APPROACH
Training is Required

**SEE** The default setting for all users will be “view access” for the modules they had access to in Compass 9.0 prior to Go-Live.

**DO** In order to receive transaction initiation privileges, users must complete required module-based training to ensure they understand the changes in the upgraded environment and can be successful in their assigned roles.

**PLAN** Users and their managers will have the option to review training plans together, prioritize and complete the most critical training prior to Go-Live and continue to complete additional training as higher levels of access privileges are needed.
Learning Approach: User Population Defined by Module Use & Transaction Type

Heavy Users: identified via usage data provided by Dr. O. and/or module leads.
A heavy user: transactions > average number of transactions over a 1-year period (February 2015-February 2016)
# Learning is a Process: Timeline

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<th>MAY</th>
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<th>JUL</th>
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<td>5-9</td>
<td>12-16</td>
<td>19-23</td>
<td>26-30</td>
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### Interactive Labs:
- SpeedType
- T&E
- Approval Workflow
- Journal Mover
- Available Budget
- Request Forms
- Award Set-Up Pages

### Pre-Requisites:
- Compass 9.2 Essentials
- Compass Capabilities for Managers
- Executive 1:1

### Back-Office Features:
- Grants (OSP, RAS,Campus)
  - AP, Emory Express, Back-Office
- Travel & Expenses
  - Grants (FGC, RAS)
- General Ledger & Commitment Control
  - ARBI, Workflows, Reporting
  - Drop-In Labs for Workcenters

### Lab Week
- Make-up Classes
- Lab Week
- Lab Week
- Lab Week

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- FGC Required to Attend Open Labs
- Back-Office, Payment Services, Asset Mgmt (Equip & Non-Equip), Treasury, SciQuest Admins, AR/Billing Users, Back-Office Changes in GL may need to be trained week of 10/17

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Open Lab Weeks (post-training)

Week of make-up classes

Week long focus for each module
Learning Programs

You are on your way!

Learner registers for required class.

Learner signs into ELMS to view their learning path which will outline required classes.

Learner receives an email notification with information about the learning program.

Learner’s manager also receives an email notification.

Learner is automatically enrolled in a learning program in Emory Learning Management System.

START
# Training Opportunities: Travel & Expense (example)

<table>
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<th>~No. of Users</th>
<th>Interactive Labs</th>
<th>Instructor Led</th>
<th>Webinar</th>
<th>Self-Paced eLearning</th>
<th>Module Lead Managed Discussion</th>
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<td>Module Lead Course Outline</td>
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*The Evergreen Transition Support Plan is still in development
APPENDIX A

Training Method Definitions
What is a Job Aid?

**DEFINITION**

- A tool that allows an individual to quickly access the information he/she needs to complete a task. Job aids typically list functional steps. Screenshots are inserted where deemed necessary for user comprehension of new content and to help minimize maintenance effort.

**WHO USES IT?**

- All end users will access job aids from a central location (TBD). Currently looking into Flip Adobe as a tool to house and organize by specific topics.
What are Interactive Labs?

**DEFINITION**

Labs set-up well in advance of training that allow users and opportunity to practice in a ‘demo’ environment.

**BENEFITS**

• Builds awareness and competency early.

• Creates foundation for learning & better value for class time.
What are Open Labs?

**DEFINITION**
An open lab environment where users can ask specific questions about the target module/topics. Optional for users however FGC required to attend.

**BENEFITS**
• Personalized learning environment and lifeline once more acclimated to changes in system

• Access to knowledgeable Subject Matter Expert for specific questions
What is a Classroom Session?

**Definition**

• Delivery of training in a lecture or classroom format demonstration conducted by a trainer who has completed a trainer readiness program (train-the-trainer). Content includes demonstrations, process overviews, scenario-based exercises.

**Benefits**

• Highest touch, engagement
• Ability to collaborate, interact
• Highest satisfaction scores typically
• Increased response rates from surveys
• Maintenance/updates relatively easier
What is a Webinar?

DEFINITION

• Instructor Led Training delivery via a distance learning tool like WebEx or Adobe Connect.

• The Webinar will consist of demonstration with integrated polling questions, and time for Q&A.

BENEFITS

• Less expensive delivery method based on increased class size capacity (increase reach)

• Ability to take class from any location
  Reduces scheduling difficulties and classroom logistics
What is Self-Paced eLearning?

**DEFINITION**

- Computer-based training where students have the ability to access training autonomously at their own pace. Non-Heavy users are mapped to eLearning.

**BENEFITS**

- Student can access learning from anywhere.
- Student can stop and start eLearning session when necessary.
What is Self-Paced eLearning in a Lab?

**DEFINITION**

- Computer-based training where students have the ability to access training autonomously at their own pace in a “lab” environment without office distractions.

**BENEFITS**

- Learner has ability to remove themselves from office distractions
What is a Module Lead Session?

**DEFINITION**

• Facilitated discussion with Emory Module Lead (Subject Matter Expert) working with small group of back office support staff.

• These sessions will most likely be scheduled prior to the general Compass User population training start.

**BENEFITS**

• Critical back-office staff receive personalized review of Compass changes to the module and the expected impact on them.

• Module Lead delivers in a less formal environment than Classroom Instruction.
What is On-Demand Help?

**DEFINITION**

• Support resources housed in PeopleSoft/Compass, and accessed through context sensitive help. Users can click links "on demand" to view tips, job aids, or access eLearning content.

**BENEFITS**

• Just in time help while working in the application

• Reduces frustration of having to locate training
What is the Support Center?

**DEFINITION**

• The support team that provides assistance with Compass-related functional questions and technical troubleshooting resulting in increased user proficiency and satisfaction

**BENEFITS**

• Knowledgeable support team to answer questions and provide assistance as needed via a variety of channels (i.e., phone, email, and possibly chat)

Go-Live
APPENDIX B
Course by Training Method
Delivery: Instructor-Led Training Courses

Total ILT Courses: 14

Accounts Payable (1)
What's New in Accounts Payable (Heavy Users)?

ARBI (3)
Collection Workbench & WorkCenters
ePay enhancements – Heavy users
Wire Claim Enhancements – Heavy Users

Commitment Control (KK) (1)
What’s New in Inputting & Processing Budget Journals

Emory Express (1)
What’s New in Emory Express (User Community)- Heavy users

Expenses (3)
Travel & Expense for Compass 9.2 - Heavy
Travel & Expense for Healthcare
Travel & Expense for Proxy Managers

General Ledger (1)
What's New in GL Heavy Users (User Community)

Grants (4)
Accounts Receivable- Grants Only
Award Receipts & Set-Up- Grants Only
Pre-Award- Grants Only
Letter of Credit Management- Grants Only
Delivery: Webinar Courses

*Total Webinar Courses: 6*

**ARBI (1)**
ePay Enhancements- Non-Heavy

**Expenses (1)**
Travel & Expense for Compass 9.2 – (Heavy)

**General Ledger (1)**
What’s New in GL Heavy Users (User Community)

**Grants (1)**
RAS Impact Overview

**Reporting (1)**
What’s New in Compass Reporting (Heavy & Non-Heavy users)

**Workflow (1)**
Understanding Workflow & Approving Financial Transactions
Delivery: Self-Paced eLearning

Total eLearning Courses: 7

Accounts Payable (2)
What's New in Accounts Payable (Non-Heavy)
ProCard (End Users)

ARBI (1)
Wire Claim Enhancements (Non-Heavy)

Expenses (1)
Travel & Expense Enhancements (Non-Heavy)

Emory Express (1)
What's New in Emory Express? (User Community) - Heavy

General Ledger (1)
What's New in GL -Non-Heavy Users? (User Community)

Security & Workflow (1)
Understanding Workflow & Approving Financial Transactions
Delivery: Module Lead

*Total Module Lead Courses: 14*

**Accounts Payable (2)**
- Accounts Payable Operations (Payment Services Back-Office)
- Financial Gateway Settlement (AP Payment Services)

**ARBI (1)**
- What’s New in Compass for ARBI (Billing Users)

**Asset Management (3)**
- Asset Disposal Workflow
- Asset Management (Equipment) Enhancements
- Asset Management (Non-Equipment) Enhancements

**Expenses (1)**
- Travel & Expense Payment Services – Back Office

**General Ledger (2)**
- Changes in GL (Back Office)
- Journal Entry Engine (Back Office)

**Emory Express (SciQuest) (3)**
- Emory Express for Payment Services (Campus and Pymt Srvcs)
- Sciquest Admins

**Treasury (3)**
- Bank Reconciliation & Accounting
- Deal Management & Accounting
- What's New in Treasury?