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# Eastern Illinois University EISE Project Training Plan

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## 1 Introduction

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### 1.1 *Purpose/Goals*

The creation of a thoroughly trained Banner user community is critical to the success of the Enterprise Information System Enhancement (EISE) Project. The knowledge and skill of how to effectively use these new systems can only be achieved through well-designed and well-executed training programs coupled with a user community that takes responsibility to take advantage of the most effective learning opportunities. The following list of goals and recommendations provides a framework for that training development and execution.

The Project Training Plan is to be used in conjunction with the Sungard Higher Education (SGHE) Education Plan. This plan focus is on completing training prior to, during and after SGHE does their part as outlined in the Education Plan. The goal of EISE Training is to ensure that customers of the new Banner systems are provided learning opportunities that will enable them to fully utilize those systems to their utmost capacity and to the mutual benefit of the University and our students. To achieve that goal, we will:

- ✓ Provide implementation teams with both technical and teamwork skills to facilitate a smooth and efficient implementation.
- ✓ Coordinate training efforts by SGHE, operational units and Training and Development (T&D) to ensure continuity, standardization, and thoroughness of the training.
- ✓ Identify who (Subject Matter Expert (SME)) is responsible for developing and delivering EIU system training to customers.
- ✓ Provide SMEs with Train the Trainer training.
- ✓ Provide employees convenient access to classroom, on-line, or hard-copy training materials they need.
- ✓ Document training efforts and completions.

### 1.2 *Overview*

The Training Plan includes:

- The scope of training, milestones and schedules, risks, the approach, and the organizational structure of trainers and attendees.
- An outline of the strategy that will provide a framework for customer training.

Staff from Training and Development will work closely with EIU system trainers, SMEs, to develop and deliver learning opportunities to customers at the point of need.

## 1.3 *Related Documents*

*The Project Training plan may refer to the following documents.*

- EISE Project Definition Document located on the Project Web Site.
- SGHE Education Plan on the Project Web Site.

## 1.4 *Definitions*

**Customers** - Customers are defined as those EIU employees or students who will need to access the Banner/Degree Audit Records System (DARS), but are not assigned to the Responsible Department for a particular system.

**Responsible Department** - The Responsible Department includes those individuals (not necessarily defined by Department parameters) who are responsible for entering or maintaining data, or defining how a Banner or DARS module is to be used at EIU.

**Subject Matter Experts (SMEs)** - SMEs are those individuals (likely from the responsible departments) who are identified to design and conduct training for their modules.

**Training Subcommittee** - Those individuals from the Responsible Department/Project Team and representatives from the Training Project Team who will be involved in the planning, development, and delivery of training to the customers. Each Banner Project Team will have a Training Subcommittee.

## 2 **Plan Scope**

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- Training for the EISE project will take three main routes:
    - **Process Teams:**
      - **Project Team Leaders** will be offered training on: group processes, conducting meetings, dealing with difficult people, personality styles, group think, successful delegation, and communication.
      - **Project Team Leaders** will be offered training for their individual teams on: working with various personality styles, taking responsibility for tasks, and working together.
      - In addition to the training listed above, the office of Training and Development (T&D) will offer to facilitate Business Process Analysis (BPA) sessions on request. T&D will provide
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## Training Plan

- one or two facilitators, Visio software on a laptop with a projector so all can observe the process. After each meeting, T&D will "clean-up" the BPA and provide it in hard copy or in Visio file to the Team leader or entire team for review and forwarding to the EISE Project manager.
- ***Subject Matter Experts (SMEs) and specialist users:***
    - Process team members and staff from responsible departments will be provided, technical training on the Banner /DARS systems by SGHE during implementation according to the SGHE Education Plan. By the time of implementation, these same people will determine training requirements to maintain Banner/DARS proficiency or to train new employees in the Responsible Department. The Responsible Department/Process Teams will also provide SMEs to design, develop, and conduct training for customers. Training & Development will offer Train the Trainer learning opportunities on: presentation techniques, use of appropriate software, and developing effective training materials. Training & Development will also provide learning opportunities on common topics to customers after implementation.
  - ***Customers:***
    - Those faculty, staff, and students who will need to access the Banner/DARS system to view or update information will be offered opportunities to learn system benefits, and use of the systems. The Training Subcommittee will determine the subject matter, as well to whom these opportunities will be made available. T&D and SMEs will work together to develop these opportunities and to make them available.
  - The opportunity to learn needed Banner/DARS expertise will be provided to Teams, SMEs and customers via a variety of delivery vehicles, including, but not limited to:
    - **Classroom presentations.** These presentations may be either informative in nature or more performance based. Classroom presentations may also include workshop type format, where the group is more facilitated than "taught".
    - **Written materials.** Written materials may be in actual booklet form on paper or they may be in booklet form provided on-line for review or printout at the Customer's discretion.
    - **On-line materials.** On-line material may include power-point presentations with appropriate narration, Camtasia presentations, showing cursor movements on screen also with narration, or simply

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script for the customer to access when needed. Written materials may be available on-line so that Customers have instant access to the most up-to-date materials available.

By providing a variety of learning opportunities to our Customers, we hope to provide WIN-WIN-WIN training -

- 1) **"When I Need" (WIN)** - when Customers need to learn something in order to use the system but not so far in advance that they forget what they have learned;
  - 2) **"What I Need" (WIN)** - so Customers are able to learn what they need to know without wading through an entire course as well as in the format that best suites each Customer's learning style; and
  - 3) **"Where I Need" (WIN)** - so Customers can come to learn what they need in a classroom and away from the interruptions of the office; learning at the Customer's desk, either in a hard copy or on-line reference; or at any computer with internet access, whether at home, at the library, or at one of our many computer labs.
- In addition, this Training Plan will address the activities surrounding on-going learning by the EIU community after implementation

### 2.1 *Learning Opportunities*

Learning opportunities will be provided:

- **By SGHE** for Project Teams, on Banner/DARS implementation, as identified in the SGHE Education Plan
- **By Training & Development Staff** for Project Teams, SME's, and Customers on BPA, Teamwork, Train the Trainer, or basic Banner procedures.
- **By SMEs** for Banner/DARS Customers on those **specific** areas needed by customers of Alumni-Development, Finance, HR, Student, and Financial Aid.
- On the Web for Customers on the latest updates and procedures as needed.

The Training Subcommittee includes:

- Employee Training and Development staff
- Banner Module Subject Matter Experts selected for each module by the Responsible Department/Project Team.

The responsibilities of the SMEs are in addition to their current role.

Software in addition to Banner or DARS that may be used to provide learning opportunities includes PowerPoint, Word, Camtasia, and Desktop Author.

Any learning opportunity that is provided in a classroom or through hard-copy user guides and quick reference guides will also be available on-line as appropriate.

The reliance on printed hard copy application user guides/job aides will be kept to a minimum. Printed materials quickly go out-of-date. User guides/job aides should be maintained on-line, so that they are readily available and also easy to maintain up-to-date. Training Subcommittees will be responsible for developing their own job aides, if they determine one is necessary.

Learning opportunities in computer labs, or conference rooms, as well as one-on-one training will be limited to those necessary. Open sessions may also be offered either virtually (from individual desktops) or in computer labs. These "Free for Alls" will allow customers to work in the Training version of Banner/DARS and have questions answered by attending experts.

Department specific training will be provided to that department in the most expeditious manner possible.

The preferred method of learning is on-line due to its economy of customer and trainer time, its ability to provide up-to-the-minute information, and also its immediate and unlimited availability.

## 2.2 Exclusions

This training plan does not include training scheduled to be completed by SGHE as delineated in the SGHE Education Plan. It also does not include any additional SGHE or other vendor provided training that a team wishes to attend.

## 3 Training Schedule

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The specific training schedule will revolve around the Go-Live (GOL) for each module. The actual GOL date is identified as "GOL" and each training activity date is either GOL+X (where +X= calendar days beyond Go Live) or GOL-X (where -X = calendar days before Go Live.) By using this convention rather than actual dates, changes in Go Live date should not require any

## Training Plan

subsequent changes to this plan. All "dates" are recommended. In cases where dates are not met, the delivery of training may not be optimal. In cases where training actually revolves around a date other than Go Live, that date will be used in lieu of the GOL Date convention.

### 3.1 *Training Schedule*

For each module that is implemented, the following schedule is recommended in order to ensure learning opportunities are provided in a timely and appropriate manner.

Time	Action	Responsible to initiate
GOL - 90	Identify Training Subcommittee (TS)	Team Leader
GOL - 85	Notify T&D of TS members	Team Leader
<b>GOL - 80</b>	T&D meet with TS	T&D
GOL - 70	Follow-up with TS and T&D Progress - Determine training topics, methods, customer make-up, and trainers. Begin developing materials.	T&D
<b>GOL - 65</b>	Follow-up with TS and T&D Progress -Review progress on the development of materials. Determine training delivery vehicles.	T&D
GOL - 60	Schedule resources for training.	TS
GOL - 45	T&D provide SME's with Train the Trainer	T&D
GOL - 30	Notify customers of training availability on-line or of classroom training dates.	TS
GOL - 30	Provide materials on-line.	TS & T&D
GOL - 20	Assemble materials, finalize "roster" of attendees for classroom training. Begin conducting classroom training.	TS
GOL + 5	Document classroom training completions and send follow-up to attending customers.	TS
GOL + to infinity and beyond	Continue updating on-line materials, and conducting classroom sessions as needed.	TS

## 4 Plan Budget

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### 4.1 Introduction

The budget was derived through discussions with Training Subcommittees and the Project Manager.

### 4.2 Budget Assumptions

There are no large unknown factors for which EIU will not have funds allocated.

Funds for major purchases will be provided through the project. Funds for consumables such as copy and paper costs will be provided through the Responsible Departments.

### 4.3 Budget Details

Needed Resources	Source of funds	Estimated Amount
1. Laptop Cart (24)	EISE Budget	\$40,000
2. Development Software		On-hand
3. Paper and copy	Assigned Department	Should be kept to a minimum
4. Staff time to develop materials	Assigned Department	Variable
5. Customer time to attend/complete training	Customer Department	Variable (minimum)

1. **A laptop cart** will be required to supplement the current lab classroom availability. The Business Affairs Division currently has one 20-machine computer lab dedicated to staff training. Labs in the academic areas, which include Booth Library, CATS, and ATAC labs are only available when not scheduled for academic classes or for department specific projects. Therefore, although they may be available for EISE implementation and/or customer training at specific times, they will not be available for this project on an as-needed basis. A 24-laptop cart with wireless capability will provide the capability to accommodate classroom computer training for the Project Teams as well as for Customers during and after implementation. The cart will give us the capability to convert virtually any available meeting or classroom into a computer lab for EISE project training. When additionally supplemented by attendees' laptops, the 24-laptop cart may provide two or three additional training classrooms. The need for the cart cannot be overemphasized, as even during implementation, there are already weeks

when SGHE has scheduled up to three 3-day consultation visits during the same 3-day period. It would not be surprising for there to be more than three as this schedule continues to be changed as visits are postponed or rearranged. The laptop cart will be secured and maintained by the Training & Development office. Any needed updates or repairs to equipment or software will be funded through the project budget.

2. **Development software**, such as MS Word, is already on hand in the users' computers. Additional software, such as Camtasia or Desktop Author is available in Training & Development, or on the Key Server. If individual departments wish to purchase this software for use at their own workstations, they may purchase it.
3. **Paper and copy costs** of training materials will be the responsibility of the Responsible Department and should be kept to a minimum through:
  - a. Increased reliance on on-line training vehicles and
  - b. Encouragement to Customer trainees to print workshop training materials on their own from the web so they may review the materials before attending classroom training. This will also greatly increase Customer understanding during any classroom presentation as well as decrease the amount of time required for classroom training, since Customers will already have an exposure to the materials before attending class.
4. **Staff time to develop materials** will be absorbed by each Responsible Department. Learning opportunities will be provided by T&D staff to optimize the time spent in the preparation of materials.
5. **Customer time to attend and complete training** will be absorbed by the Customer Departments. Training time will be kept to a minimum through the use of on-line learning opportunities.

## 5 Assumptions/Dependencies

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### 5.1 Assumptions

Assumptions for the project training are:

- SGHE will provide standard "vanilla" consulting and training as scheduled to the project teams for each module. SGHE will provide consultants and trainers as scheduled who will have the expertise required to provide guidance and answer questions as needed.
- A Training Instance (version of Banner) will be available for University-wide training.

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- Responsible Departments will have staff available to develop and provide Customer Learning Opportunities even as they are completing implementation and providing staff training for their own departments.
- Training Classrooms with appropriate hardware and operating system will be available for training. Classrooms in any area of the University community will be utilized when available, to conduct Project Team training as well as Customer training.
- SGHE will train the first few sessions of each module using "seed" data. As the EIU data becomes available for each module, this EIU data will be used for training in a non-production environment.
- Responsible Departments will provide application & module Subject Matter Experts for custom and ongoing training needs.
- Training & Development will provide "Train the Trainer" for Responsible Department SME's.
- Learning opportunities will be available to any user of Banner/DARS.
- The Customer department leaders will provide the opportunity for their employees to attend/take advantage of learning opportunities.
- After initial SGHE system and module training, Project Team members will have the opportunity to test and continue learning in a non-production environment.
- EIU staff and faculty will be committed to learning what they need to know about using the Banner product.
- Classroom training will be offered to accommodate departments' unique time needs. (Ex: 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> shift and multiple offerings to accommodate coverage & business cycles.)
- The Training Subcommittee will identify and notify Customers when training is available and schedule them for training if applicable.
- Training Materials will be developed with specific content addressing the unique needs of each area. It will be the responsibility, after implementation, of the Responsible Department to work with various areas of EIU to ensure that materials are updated as needed.
- General interest training that will be used across all areas, such as introductory materials on how to navigate Banner, will be provided and updated by Training & Development.
- Customers will take advantage of existing learning opportunities to acquire needed skills in Access or Excel for reporting.
- The Project web site will provide easy access to all learning opportunity materials produced for Customer use by the Training Subcommittees.
- The Project web site will be maintained by T&D and ITS.



## Training Plan

Risk	Probability of Occurrence (A)	Estimated Project Impact (B)	Weight B+(A-1)	Mitigation Strategy	Contingency
High volume of Customers to be trained in set timeframe	3	2	4	Control	Adjust responsibilities or change in training schedule
Limited data retrieved out of system to generate reports	2	2	3	Control	Use what data is available
Some Customers not comprehending	3	1	3	Control	One-on-one training for exceptions
Customers not attending training	2	2	3	Control	Encourage use of on-line opportunities
Unavailability of Computer Labs to conduct training	3	3	5	Control	Encourage use of on-line opportunities, or utilize customer laptops.
Unavailability of training instance	2	2	3	Control	Encourage use of on-line opportunities or reschedule training.
Inadequate testing of functionality and process prior to "Go Live"	2	2	3	Control	Use what testing and resources are available
Completeness of the Standard Operating Procedures documentation	2	2	3	Control	Use what is available
Limited time allocated to attend training.	3	2	4	Control	Encourage use of on-line opportunities
Turnover of users during training timeframe	3	1	3	Control	Re train
Turnover of SMEs during training timeframe	2	2	3	Control	Maintain multiple SME's at all times.
Loss of retention of knowledge and functionality between training and "Go Live"	1	2	2	Control	Rely more on on-line training/refresh.

## 7 Responsibilities

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The success of the EISE project and this Training Plan depends on each participant fulfilling, to the best of their ability, their individual responsibilities with regard to the project.

### 7.1 Training Subcommittee Members

There will be a Training Subcommittee for each of the EISE Project Teams. For each Project Team, the committee will consist of the Training & Development Representative(s), Subject Matter Experts, Project Team Leader or representative(s).

#### T&D Representatives

- Develop, gain approval for, and implement this Training Plan.
- Ensure the training needs are addressed effectively and in a timely manner.
- Coordinate with EIU organizations to ensure facilities and equipment are available for SGHE, Project Team, and Customer training.
- Provide Train-the-Trainer Training to SME's.
- Receive and respond to feedback to refine the training process.
- Ensure the project website to include all developed learning opportunities.
- Maintain records of training activities and participation.
- Assist SME's to develop training materials.
- Develop written and on-line materials for general interest topics.
- Conduct Customer training on general interest topics.

#### Subject Matter Experts

- Identify subjects to be covered during Learning Opportunities.
- Determine Customers who need to receive training.
- Research equivalent training at other Universities and select the most appropriate training model for EIU.
- Develop written and on-line materials for module specific topics.
- Conduct Customer training on module specific topics.

#### Project Team Representatives

- Identify SME's and notify them of their responsibilities.
- Approve funds expenditures when appropriate for producing training materials.
- Approve classroom training schedule.

## 7.2 *Critical Players*

In addition to the Training Subcommittee, there are other "Critical Players" who are essential to the success of the training program.

### ITS Support Staff

- Ensure the Banner Training Instance is available when classroom training is scheduled.
- Provide speedy support when problems with the Training Instance are encountered during training.

### EISE Steering Committee

- Ensure resources are provided to support training efforts.

### EIU Deans, Department Heads, and Supervisors

- Encourage employees to take advantage of learning opportunities.
- Provide employees with time to attend classroom training and complete on-line learning opportunities.
- Convey the importance of Banner competence to employees.

### EIU Computer Lab and other facility Managers and Schedulers

- Allow access to facilities for EISE project training when possible.

## **8 Approach**

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### 8.1 *Team Skill and Knowledge Requirements*

The following chart identifies the Skill and Knowledge requirements for Teams involved in project implementation.

## Training Plan

Skill or Knowledge	Description	Project Activity Affected	Learning Method
Procedures for project implementation	Understand proper procedures for communication and processes within the scope of the project.	All	Briefings, Project Documentation, Regular meetings.
System and Module functionality and business process rules.	Understand the integration of system and business flow.	Training System specifics to Team	SGHE Education programs for each Process Team.
Current AS IS functionality and process flow	Understand the AS IS to be able to develop the TO BE process	Document the AS IS and train the TO BE	Business Process Analysis accomplished in small groups of Process Actors.
Work as a team to achieve the goal of the University as a whole.	Understand the nature of a team effort, both within the process team of which they are an individual member, and the University team of which their team is one part.	Achieving goals, minimizing conflicts, and maximizing results.	Small groups facilitated by T&D.

### 8.2 Individual Skill and Knowledge Requirements

Project Team Member	Skill or Knowledge	Description	Learning Method
Subject Matter Expert	Understand how the system functions, reporting structure needs, Web, process workflow and how this affects the roles of team members & the impact on other application teams.	Understand and have the ability to transfer knowledge of system to the customer.	Attend SGHE consulting and training as scheduled. Attend Train the Trainer as needed. Attend Teambuilding Training as needed.
Training & Development Staff	Understand the Banner basics, Web, & integration of systems, adult learning principles,	Understand and ability to transfer knowledge to all application teams.	Attend SGHE consulting and training as needed. Work with Responsible Department Training Subcommittee members.
Technical Process Analysts	Understand the integration of systems, Webs, reporting, and process with all data relationships.	Understand and ability to transfer knowledge from system to system, module to module for all application teams.	Attend SGHE consulting and training as needed. Work with Training Subcommittee as needed.

## Training Plan

### 8.3 Learning Sources

Sources of Learning Opportunities during Implementation will be provided primarily by SGHE and include:

	On Line Application Help	User Manual (Bookshelf)	Quick Ref Guide/Job Aides	Instructor Led (Classroom) Learning
Implementation Team	X	X	X	X
Subject Matter Expert	X	X	X	X
Training & Development	X	X	X	X
Technical Process Analyst	X	X	X	X

Sources of Learning Opportunities after Implementation will be provided primarily by T&D for general interest topics and by department SMEs for module specific topics:

	On-Line Application Help	On-Line video guides (Camtasia)	On-Line written guidance	Additional
Customers	X	X	X	<b>Instructor Led (Classroom Learning)</b>
Employees new to the managing department	X	X	X	<b>Individual mentoring</b>

### 8.4 Training Documentation

Project Team Leaders will provide T&D with attendance names for SGHE Consulting and Training. T&D will maintain training records for SGHE delivered training for the project.

T&D will maintain Customer training records for classroom learning opportunities provided by SME's. SME's will provide attendance lists to T&D at the completion of each training session.

## 9 Deliverables

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- EISE Project Training Plan
- Train the Trainer workshops
- On-line access to EISE training materials/presentations
- Job Aides developed in electronic and hard copy form, as needed
- Classroom EISE Customer Training

**Approval to Proceed**

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Name EISE Steering Committee  
Title  
Date

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