PeopleSoft 9.2 Implementation Training Best Practices

Session ID#: 102750

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SpearMC Consulting
Administrative Notes

Please:

- Silence Audible Devices
- Note Fire Exits
- Partake of Refreshments
- Note Quest Staffers (green shirts) and Room Monitors
- Complete Feedback Form
- Ask Questions
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About SpearMC and Your Presenter
About SpearMC

Founded in 2004, SpearMC is a technology and professional services firm specializing in

- PeopleSoft Financials and Supply Chain Management
- PeopleSoft Human Capital Management and Payroll
- ERP Architecture and Application Development
- Project and Program Management (PMO)
- Change Management
- ERP Training
- Mobile Technology
About SpearMC

Regional offices in Chicago, Denver, Oklahoma City, Seattle and San Francisco

- We focus on local market delivery and capability development in line with industry focus areas unique to the regions we serve.

- Our local and well-connected network of top-tier business analysts, technical leads, developers and project managers keep travel cost to a minimum.
About SpearMC

Oracle Gold Partner since 2008:

- Gold Level Partner
- PeopleSoft Specialization
- Applications Reseller
- Hardware Reseller
Services and Competencies.
Technology and Business Consulting

- Full-service ERP and BI Selection, Implementation and Integration
  - PeopleSoft
  - JD Edwards
  - Oracle EBS
  - Hyperion
  - Dynamics AX

- ERP Training
- IT Transformation and Strategy
- Infrastructure and Architecture
- ERP Application Development
- Capability Assessment
Services and Competencies

Program and Project Management

- Project Management Office
- Project Portfolio Management
- Change Management

Business Transformation

- Operations Improvement (Six Sigma, Lean)
- CIO and CTO Advisory Services
- Strategy for Pricing and Revenue Enhancement
Methods and Tools.
Methods and Tools

Needs Analysis

- IT Strategy and Transformation
- ERP Selection and Integration
- Business Transformation
- Project Management

Assess Staffing Requirements

- Complement Existing Expertise
- Capability Assessment
Methods and Tools

Tools, best practices and proven management techniques include:

- Continuous Improvement
- Six Sigma and Lean
- Agile Project Management Techniques
- Change Management
Your Presenter

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866-SPEARMC x801
www.SpearMC.com

- Co-founded SpearMC Consulting in 2002
- PeopleSoft Financials, Cash Management and Procure-to-Pay Expert
- Certified PeopleSoft v9.1 Financials
- 20+ Years Experience...majority PeopleSoft

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Your Presenter

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- 15 Years – PeopleSoft Consulting Experience
- 12 Years – Specialty in PeopleSoft Grants Management

- Grants
- Project Costing
- Contracts
- Billing
- Accounts Receivable
- Commitment Control

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SpearMC PeopleSoft ERP Training Overview
“Oh-No...not another ERP roll-out!”

WE JUST UPGRAD ED OUR ORACLE ERP... YOU FOLKS IN FINANCE & HR WILL NEED TO BE TRAINED SO YOU CAN AVOID ANY EMBARRASSMENTS.

WE HAD A MONK WRITE THE TRAINING GUIDE ON A GRAIN OF RICE. WE COULD ONLY AFFORD ONE, SO YOU’LL HAVE TO SHARE IT.

TO BE HONEST, I’M NOT SURE WE HAD A REAL MONK. HE WROTE EVERYTHING IN PIG LATIN.
Understanding adult learning

Common myths and misconceptions about training

“Do’s” & “Don’ts”
Adult Learning Characteristics

- **Autonomous Learning**
  - How can I direct my own learning?

- **Relation to experience**
  - How is this like what I already know?

- **Practicality**
  - How does this directly relate to my job?

- **Goal-oriented learning**
  - What are the main objectives of this training?
Those receiving training should take an active part in developing the Training Agenda

- See On-Line Resources for Agenda examples

Have users create a personal goal sheet – include goals that can be measured over time:

- Specific Job Functions or Career Growth
- Experiences from others (i.e. classmates or instructor)

Let students take turns acting as facilitator.

- Make it relevant to the topic – remember, everyone has unique experiences to share.

Use peer learning and group exercises to encourage users to teach each other.
Create training tailored to the different jobs people have
- One-size training does NOT fit all

Have students discuss how they currently do procedures, then show the similarities between what they know and what they are learning

Use the language that users already know
- When possible, incorporate existing business terms with new processes
Have students process real transactions in a training environment.

Make sure training documentation shows real data such as business units and accounts, not vanilla values.

Show what happens to data downstream – don’t have students enter data in a vacuum.
Clearly define objectives for training early

Reinforce how learning elements match up with training objectives

Review objectives upon completion of training
Common Myths & Misconceptions about Training

- Training is a one-time occurrence
- Students only learn in a classroom
- A training course should cover everything a student needs to know
- It doesn’t matter when students are trained as long as the right material is covered
“Dos” of ERP Training

DO train early and often

- Incorporate users into early stages of the project;
- Provide timely training and follow up;
- Incorporate enough time to build in-depth discovery activities;
- It’s OK to train on a demonstration environment early on;
- Over-communicate with newsletters, education updates and upcoming classes.
Example ERP Training Approach

- Requirements Phase...or shortly after project kick-off

  - Conduct half-day Introductory Workshops with Team Leads, SME’s and Project Managers
    - Orient students with the new look and feel of the system.
    - Briefly cover system functionality and new concepts.
    - Create a common shared folder and encourage them to review Existing ERP Vendor Documentation, Delivered Educational Material and/or Training Material from other on-line or third-party sources.

Example ERP Training Approach

- Design Phase...or prior to Process Flow development
  - Conduct one-to-two days of ERP systems processes training with Team Leads and SME’s
    - Begin to familiarize students with ERP system’s delivered processes.
    - Target the ERP system core foundational concepts (e.g. Business Units, Dimensions, Item Groups).
    - Goal is to be able to give students enough training to feel confident in building initial process flows.
Example ERP Training Approach

- UAT and Roll-out (preceding UAT testing)
  - Conduct hands-on, exercise driven training with all end-users
    - Formalized functional training should cover all UAT test scripts.
    - Incorporate activities that mimic what they will be testing during UAT.
    - Use this as a good opportunity to incorporate “Adult Learning Characteristics”
      - Autonomous Learning, Relative to Experience, Practicality, Goal Oriented Learning

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Example ERP Training Approach

- Post Production...or two-to-three months after go-live
  - Conduct brown-bag or half-day sessions for all interested end-users
    - Focus on collecting actual post-production scenarios for training.
    - Have end-users take primary responsibility for putting agenda together.
    - Goal is to set into motion an on-going and collaborative interaction between end-users.
DO make sure you have enough time to cover material

- Remember that you also need to address any questions or follow-up

DO have fun with the material

- While training covers important information that users need, it is much easier to impart that knowledge if students are enjoying themselves
- Humor and games can be a great way to keep people engaged – just make sure you keep it appropriate for the subject matter and the audience

DO remember that you’re teaching people

- Make sure that participants have adequate breaks, interactions, chances to participate in their learning, and comfort while taking training

DO sell the product

- Users need to see the benefits of both the application and business processes
DON’T train on unfinished or buggy software
  ▪ If things don’t work correctly, users often leave training thinking the application does not work

DON’T overwhelm participants with things they don’t need to know
  ▪ Cover the material, but focus on key information

DON’T neglect feedback
  ▪ Before training, ask participants what they want/need to know and incorporate that into the training
  ▪ After training, get feedback from participants about what worked and what didn’t so you know how to follow up
DON’T put training development off until the last minute

- Training is an integral part of any project and must be budgeted as such – an application is only as good as the people who use it

DON’T think that training will resolve all user issues

- Training cannot possibly address everything – have reasonable expectations
Resources
Oracle UPK Overview
UPK is Oracle’s Application Content Development Platform for:

- Oracle EBS, PeopleSoft, JD Edwards and Siebel

- Software for recording and playing back simulated online processes

- Publish simulations as course guides, job aids, online training, in-application help files, glossaries, test scripts

- Four Different Modes:
  - See It!
  - Try It!
  - Know It!
  - Do It!
**Project ID:** METAB_ST1

**Title:** Studying changes in metabolism

**Department:** Biology Department

**Subdivision:** School of Medicine

**Institution:** PSU Medical Center

**SPO:** SP01

---

**F & A Distribution**

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<th>Comments</th>
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<td>EGV03</td>
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**Project Percent Share:** 100.00

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Use the **Project ID** field to enter the ID for the project. When you first create a draft proposal, the system automatically creates the first project and budget header with ID of Next_1.

Enter the desired information into the **Project ID** field. Enter "METAB_STUDY01".
Use the **Description** field to enter a brief version name. If you leave this field blank, the entry in the **Title** field appears by default. The system uses this title in the award generation process to name the award. The name of the generated post-award project comes from the proposal project short title.

Enter the desired information into the **Description** field. Enter "**Studying Metabolism**".
Creating Proposals

Score Needed: 70%

Press [Enter] to start.
Maintain Proposal

Find an Existing Value  Add a New Value

Business Unit EGV05
Proposal ID NEXT
Version ID V101

Add

Find an Existing Value  Add a New Value
## Creating Proposals

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| 1.   | Begin by navigating to the **Proposal** page.  
Point to the **Grants** link. |
| 2.   | Point to the **Proposals** link. |
| 3.   | Click the **Maintain Proposal** link.  
[Maintain Proposal] |
| 4.   | Click the **Add a New Value** tab. |
| 5.   | Click in the **Proposal ID** field.  
[NEXT] |
| 6.   | Enter the desired information into the **Proposal ID** field. Enter a valid value e.g. "NIHPROP01". |
| 7.   | Click the **Add** button.  
[Add] |
| 8.   | Use the **Proposal** page to establish proposal-specific details. |
| 9.   | Use the **Description** field to enter a brief version name. If you leave this field blank, the entry in the **Title** field appears by default. The system uses this title in the award generation process to name the award. The name of the generated post-award project comes from the proposal project short title. |
Fit Gap Analysis
- Central repository for as-is and to-be business processes
- Step-by-step documentation of current procedures

Testing
- Easy creation of repeatable test scripts
- Track knowledge through testing

Training
- Easy creation of training documentation (training manuals and online documentation)
- Consistent tone as well as look and feel

Quick Reference Guides/Job Aids
- Step-by-step instructions for key procedures
- Same format as training and online documentation
Incorporation of business processes

Content that relates specifically to your business or organization

Background on steps, such as business processes and policies

Incorporation of existing documentation

Delivered steps may not be the same as business procedure

Documentation of custom functionality

Integration with context-sensitive help using Do It mode
Plan how you want to use UPK

- Identify which parts of the tool will most benefit your project
- Create a strategy for creating and delivering content

Allow time and resources for UPK development in your overall project plan

- Have dedicated resources working on content

Evaluate when content is needed and plan to that need

- Make sure you budget enough time and resource availability before you want to use UPK to develop the content

Plan for the system resources required to support UPK

- Who will maintain content going forward?
- Where will the content live?
SpearMC Online Resources
Other SpearMC Tools & Resources can be found at www.spearmc.com

LEARN AT YOUR OWN PACE
Our downloadable PeopleSoft training courses include step-by-step demonstrations and comprehensive study guides, making them invaluable resources for self-motivated learners.

PEOPLESOF T V9.2 FOUNDATIONS AND QUERY

- F1 - PeopleSoft v9.2 Foundations (FSCM) - Course Agenda | View a Sample
- F2 - PeopleSoft v9.2 Foundations (FSCM) - Training Guide (163 pages) | View a Sample
- F3 - PeopleSoft v9.2 Foundations (FSCM) - Presentation (62 slides)
- F4 - PeopleSoft v9.2 Foundations (FSCM) - Student Exercises (60 pages)
Other SpearMC Tools & Resources can be found at www.spearmc.com

REGIONAL USER GROUPS
- PACIFIC NORTHWEST RUG
- ROCKY MOUNTAIN RUG
- OKLAHOMA CITY EVENTS
- NORCAL RUG

ORACLE & QUEST CONFERENCES
- QUEST COLLABORATE CONFERENCE PRESENTATION
- QUEST RECONNECT CONFERENCE PRESENTATION
- ORACLE OPEN WORLD PRESENTATIONS
Get in touch

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Please complete the session evaluation

We appreciate your feedback and insight

Session ID#: 102750
Visit Seth & Dana at the Quest International Users Group Booth #337

- Let us show you how to leverage the Quest community to maximize your ERP investment

- Receive your personalized Quest Activation Plan & learn how to make the most of your membership

- Plus, find out how you can join us in celebrating our 20th year of success – you might just win a special Quest-themed bottle of Kentucky bourbon!

Quest is the home for PeopleSoft and JD Edwards Users