

PeopleSoft V8 Upgrade Training Strategy

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Student Admin – Go Live Oct. 2

- Campus-wide training will be developed for:
 - Student Administration Upgrade for Experienced Users
 - Student Administration for New Users
 - Query
 - Crystal Reports
 - Phase Reports
 - Schedule of Classes
 - Printing Unofficial Transcripts
 - Academic Advising
- Campus-wide training is tentatively planned to be released, Sept. 20, 2 weeks prior to the “go live”.
- Formats: Web-Based and Hands-on training
- In addition to campus training, training materials will be produced for Contributor Relations, Student Records, Student Financials, and Admissions for staff within the user offices. This training will be conducted by the individual functional leads. Training materials should be completed by Sept 13 provided training receives the appropriate documentation from the functional leads by Aug 16th.

Student Records: Self Service – Go Live Nov. 2

- Campus-wide training will be developed in a web-based format for the self service apps. These materials are tentatively scheduled to be released 1 week prior to the self-service “Go Live” – Nov. 2. The following topics will be developed in a web-based format:
 - Enrolling in Classes
 - Searching the Schedule of Classes
 - Student Financial Summary – viewing student bill
- In addition, a web-based tutorial will be created for Faculty on entering mid-term grades and released 1 week prior to the go-live for the grade entry process.

Human Resources/Payroll

- Campus-wide training will be developed for TAARS (term academic activity reporting). This will be a web-based training module. Tentative release date: Sept. 20, 2 weeks prior to go-live
- In addition to campus training, training materials will be produced for Payroll and Human Resources for staff within the user offices. This training will be conducted by the individual functional leads. Training materials should be completed by Sept 13 provided training receives the appropriate documentation from the functional leads by Aug 30th (at the latest)

Campus Community

- At the present time, it is not known what training will need to be developed for Campus Community. Currently, functional leads from each of the respective areas are working together to determine how campus community who be handled and who will be responsible. Once they have finalized their plans, training will work with the appropriate individual(s) to develop a training plan.

Financials – Go Live November - December

- Two major areas for campus training: **Requisitions** and **Financial Inquiry**
 - Two courses for Experienced (Current) Users:
Requisitions Upgrade for Experienced Users
Financial Inquiry Upgrade for Experienced Users
 - Two courses for New Users:
Requisitions for New Users
Financial Inquiry for New Users
 - Formats: Web-based and Hands-on training
 - Tentative release dates: 2 - 3 weeks prior to go live. Note: This is contingent upon the business process being finalized by early to mid-November.
- In addition to campus training, training materials will be produced for General Ledger, Accounts Payable, and Purchasing for staff within the user offices. This training will be conducted by the individual functional leads (Claire Purdy, Andy Roth, and Jing Li). Training materials should be completed 3 weeks prior to the go live date provided training receives the appropriate documentation from the functional leads by early to mid November.