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**PEOPLESOFT Financials Phase I Implementation  
END-USER TRAINING PLAN**

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Approved by:

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UMS Project Manager

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Date

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## Purpose

The purpose of this document is to provide the rollout plan for end-user training, including the training of trainers and updating of the training material, if necessary.

This document identifies the end-users to be trained and the functional training which will be required in order for them to perform their job responsibilities. It will specify the content, structure, audience, media, and format of the documentation of the PeopleSoft system for the end-users.

### Assumptions:

- Expenses will be implemented fully with Self-Service expense entry at System-wide Services as a pilot, and without Self-Service at the other institutions.
- n/Vision training will occur for specific campus personnel after go-live.
- Some level of campus training will occur for users who are new to these job responsibilities. Training specific to the job, for example, of requisitioning must be taught to the user by campus staff before the user attends PeopleSoft training.
- Some level of Excel training will be offered to users without Excel experience.

## Rollout Plan

Users requiring training are categorized by groups according to the training they need. “**Identification of End Users**” section identifies each “role” to be trained. In the “**Description of Classes**” section, the classes to be offered for the Financials rollout are listed and described.

### Identification of End-Users

Training will be presented to a variety of audience groups. The courses and materials for each group’s training will be relevant to their role. A role is a set of job responsibilities that has a specific set of processes that define how to carry out those responsibilities. For example, the “Requisition” role creates requisitions.

The users were placed in the new Financials roles by the appropriate staff at each institution. Users’ access was reviewed in the old systems, and mapped to the new roles in the PeopleSoft Financials systems. In some cases, institutions are planning to change the way work is carried out, and new people are being given new responsibilities.

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## The Roles

The processes that users must perform in PeopleSoft Financials have been categorized into the following roles.

### Purchasing/Payables

**Group 1: Requisition** – The employee with this role will create requisitions.

**Group 2: Receiving** – The employee with this role will receive goods online. He or she will help resolve problems between requisition and invoicing when discrepancies arise.

**Group 3: Requisition Approver** – An employee with this role will use PeopleSoft pages to approve requisitions that are over the campus limit set for automatic approval.

**Group 4: e-Commerce** – These users will use the e-Commerce application to buy products directly from vendors such as Boise-Cascade and Fisher Scientific.

**Group 5: Payables** – These users will enter vouchers into PeopleSoft, manage standing orders, void checks, stop payments and create manual checks.

**Group 6: Purchasing Inquiry Only** -- These users use “look up” Purchasing information PeopleSoft but do not enter or update information.

**Group 7: Campus Administration Purchasing/Payables User** – These users will perform the tasks for each institution that are not distributed, such as creating vendors, maintaining vendor data, manually source requisitions, creating express purchase orders and processing purchase orders.

**Group 8: Vendor Creation** – This user will be able to create vendors for a Business Unit.

**Group 9: Vendor Maintenance** – This user will be able to change vendor information for a Business Unit.

**Group 22: RFQ** – This role designates people who should be trained in the “Request for Quote” business process. Users with this role, except those who are also in Group 7: Campus Administration, will be trained in Request for Quote after go-live.

### General Ledger

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**Group 10: Journal Entry Excel only** – This role has been absorbed into the Online Journal Entry role. We have determined that Excel Journal Entry is another tool to use for Journal entry, but that users should be trained in Online Journal Entry as well.

**Group 11: Journal Entry Online** – An employee with this role will use PeopleSoft pages to enter, edit and submit journal entries. S/he will also have the ability to use the PeopleSoft delivered Excel interface to create journal entries.

**Group 12: Journal Approval** –An employee with this role uses PeopleSoft pages to approve and mark for post or deny journal entries submitted through Excel or online.

**Group 13: GL Inquiry** – An employee with this role will use the pages developed for this implementation that replace WebFAST, called GL Inquiry Pages.

**Group 14: Campus Accounting** – Users in this role will post journal entries, import journal entries from Excel journal creation, perform Year End Processing.

## Expenses

**Group 15: Expenses Entry** – These users enter summarized Expense data into PeopleSoft for people requiring reimbursement for travel and other expenses. There will be one or two people per institution fulfilling this role. *To be further defined.*

**Group 16: Expenses Self-Service** – On the go-live date, July 5, 2005, only SWS users will be in this role. SWS employees who travel or require other reimbursement will pilot the Expenses Self-Service functions.

## Other

**Group 17: “Forms” users** – These users use paper forms to interface with the financial systems. They are infrequent users so will fill out a form request for purchases or for journal entries.

**Group 18: Query** – Requires ability to write ad hoc reports against employee, payroll or benefits data.

**Group 19: Trainers for GL** – People designated as trainers for General Ledger will take classes in training Excel journal entries, online journal entries, GL Inquiry pages, and “How Business Will Change in the UMS.” They will then deliver this training at their campuses.

**Group 20: Trainers for Purchasing and Payables** –Trainers designated as trainers for AP/PO will take classes in training requisitions, receiving and approval requisitions, and “How Business Will Change in the UMS.” They will then deliver this training at their campuses.

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**Group 21: Help Desk staff** – Because the Help Desks are generally called when users don't know where else to call, Help Desk staff will be trained in basic navigation and in who to call for specific issues.

## The Users

The users in each role have been identified. Each institution has provided a spreadsheet of users' names with the appropriate role for that user marked with an "x" or the word "new". The individual users will not be identified in this document. For the users to be trained in each role, use a web browser to access:

<https://erpdocs.maine.edu>

The spreadsheets are located in Financials/Phase I/Users-Roles. There may be more than one spreadsheet for an institution. The date of the spreadsheet has been added to the name. Look for the most recently dated spreadsheet.

## Description of Classes

The following training will be offered as part of the Financials Phase I implementation, which consists of General Ledger, Accounts Payable, Purchasing, Expenses and a new Chart of Accounts.

Training will be offered in three different ways, depending on the class. The abbreviation in the **Type** column in the chart below indicates that training will be taught:

- by the PeopleSoft Project staff (S),
- by the Train the Trainer model (T)

Classes	Length	Type	Audience
How Business Will Change in UMS	1.5 hrs	S/T	All Groups
Using the GL Inquiry Pages	2 hrs	T	Groups 10-13 – GL Inquiry
Online Journal Entry & Approval	4 hrs	T	Group 11 – Journal Entry Online Group 10 – Journal Entry Excel
Journal Entry using Excel	3 hrs	T	Group 11 – Journal Entry Online Group 10 – Journal Entry Excel
Accelerated Online, Excel & Approval Journal Entry	3 hrs	T	Group 14 – Campus Accounting
Requisitions and Receiving	9 hrs	T	Group 1 and 2 – Requisition and Receiving
Requisitions and Receiving – Accelerated	4 hrs	S	Group 5 – Payables Group 7 – Campus Administration

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Approving Requisitions	1.5 hrs	T	Group 3 – Requisition Approver
Using e-Commerce (postponed)	2 hrs	T	Group 4 – eCommerce
Campus Accounting	1 day	S	Group 14 – Campus Accounting
Campus Purchasing/Payables Administration (by documentation only)	1 day	S	Group 7 –Campus Administration
Accounts Payable	3 days	S	Group 5 – Payables Group 7 – Campus Administration
Creating and Maintaining Vendor Information	4 hrs	S	Groups 8 and 9 – Vendor Creation and Vendor Maintenance Group 7 Campus Administration
Travel & Expenses Self-Service	3 hrs	S	Group 16 – Expenses Self-Service (SWS only)
Entering Summary Travel & Expense Data	3 hrs	S	Group 15 – Expenses Entry
How Business Will Change for Trainers	6 hrs	S	Groups 19 and 20 – Trainers
Online Journal Entry; Excel Journal Entry; Journal Entry Approval for Trainers	1 day	S	Group 19 – Trainers for GL
Requisitioning, Receiving and Approving for Trainers	2 days	S	Group 20 – Trainers for Purchasing and Payables
GL Inquiry Pages for Trainers	4hrs	S	Group 19 – Trainers for GL
e-Commerce for Trainers (Postponed)	2 hrs	S	Group 20 – Trainers for Purchasing and Payables
Query Reporting	1 day	S	Group 18 – Query users
Help Desk Training	2 hrs	S/ T	Group 21 – Help Desk staff

## **Classes for All Employees with Financial Roles**

***How Business Will Change*** will be taught by campus Trainers and Project Enterprise trainers. This class will give an overview of how all the financial systems are changing with the PeopleSoft Financials implementation. The goal for this class is for the user to understand how the implementation will impact the day-to-day activities related to Financials. This class will teach the structure of the new Chart of Accounts and how to use the Translation Tool being provided as part of the implementation. The Translation Tool translates old FAST ten-digit accounts to their corresponding PeopleSoft ChartField Combinations.

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*Using the GL Inquiry Pages* will be taught to anyone who will have access to the GL Inquiry Pages (formerly WebFAST). This class will be offered via demo or hands-on.

## General Ledger Classes

*Online Journal Entry & Approval* will be taught by campus Trainers. This class is for employees who will enter, edit and submit online journal entries. It will provide more in-depth Chart of Accounts training than offered in “How Business Will Change.” This class is also for Journal Entry Approvers and will cover the Approval process via Workflow, as well.

*Journal Entry using Excel* will be taught by campus Trainers. This class is primarily for employees who will only use PeopleSoft delivered Excel-based tool to create journal entries, but employees who will enter Journals online should attend, as well. They will be taught how to create journal entries using a PeopleSoft delivered Excel-based tool, and how to upload the spreadsheets to PeopleSoft.

*Campus Accounting* is for accounting department employees who will post journal entries, import journal entries, and enter budget data.

## Purchasing and Accounts Payables Classes

*Requisitioning and Receiving* will be taught by campus trainers and will instruct users in how to create and modify requisitions, how to receive goods, how to create a Request for Quote online, as well as any inquiry pages or reports they will need. The class will include an overview of Purchasing and how the Requisition, Purchase Order and eventually the Invoice all fit together in the PeopleSoft system. An accelerated version, with less hands-on, will be offered for the Campus Purchasing and Payables Administration staff. This class will be divided into three 3-hour classes: REQ 100, REQ 200, and REQ 300.

*Approving Requisitions* will be taught by campus trainers. This class will provide an overview of Purchasing and how to create requisitions. It will teach Requisition Approvers how to approve requisitions.

*Using e-Commerce (Postponed)* will be taught by campus trainers. This class will teach users of e-Commerce how to use the new e-Commerce web that will be used for purchasing through Boise and Fisher.

*Campus Purchasing/Payables Administration (documentation only)* will teach those people who work in the Accounts Payable and Purchasing departments how to do tasks central to Accounts Payable and Purchasing such as express purchase orders, processing purchase orders, and 1099 processing. The users in this group must take *Requisitions and Receiving-- Accelerated, Accounts Payable and Vendor Creation and Maintenance*.

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***Accounts Payable*** will teach employees in the Accounts Payable and Purchasing departments how to do tasks central to Accounts Payable and Purchasing such as creating and maintaining vendors, stop payment, void checks, and manual checks. This class is **3** days long and will be broken into two sections: AP 100 which will be two days, and AP 200 which will be **1 day**. These users must also take *Requisitions and Receiving--Accelerated*.

***Creating and Maintaining Vendor Information*** will teach those identified as having “Vendor Create” and “Vendor Maintain” roles how to add new vendors or modify the existing vendors. This class must also be taken by the Campus Purchasing/Payables Administration users.

## **Expenses Classes**

***Entering Summary Expense Data*** **TBD**

***Travel & Expenses Self-Service*** will be taught to employees at System-wide Services, which was identified as the pilot campus for the full implementation of Expenses. Employees who travel and must report travel expenses will be taught how to use the Self-Service component of Expenses.

## **Train the Trainer Classes**

***How Business Will Change for Trainers*** will be taught to those people identified as campus trainers who will be delivering this class at their campuses. It will also include instruction on being an effective trainer.

***Online Journal Entry, Excel Journal Entry and Approval for Trainers*** will be taught to those people identified as campus trainers. This class will include instruction on entering, editing and submitting journal entries, creating journal entries using Excel, approving journals and hints and tips for training the materials.

***Requisition, Receiving and Approval for Trainers*** will be taught to those people identified as campus trainers. This class will teach the trainers how to create and maintain requisitions, approve requisitions and create RFQs. It will include instruction on delivering the class as well as instruction on training.

***GL Inquiry Pages for Trainers*** will be taught to campus trainers. This class will instruct the trainers how to use the GL Inquiry pages, and instruction on delivering the class.

***e-Commerce for Trainers*** (**Postponed**) will be taught to campus trainers. This class will instruct the trainers in the use of e-Commerce and instruction on delivering the class.

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## Courses of Study

For many roles there will be more than one class required. The following outlines the classes required for each role.

### Purchasing/Payables Courses of Study

<b>Group 1: Requisitions and Group 2: Receiving</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Requisitions and Receiving:</b>		
<b>Req 100</b>	3 hrs	Overview of purchasing, navigation, creating requisitions
<b>Req 200</b>	3 hrs	Receiving, Reporting, Inquiry pages, Chart of Accounts
<b>Req 300</b>	3 hrs	Purchase types, ship-to address, comments, scheduling and distributions

<b>Group 3: Requisition Approver</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Approving Requisitions</b>	1.5 hrs	Anatomy of a Requisition, Approving Requisition, Reconciliation Workbench, inquiry pages

<b>Group 4: e-Commerce</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Using e-Commerce</b>	2 hrs	Chart of accounts, using e-Commerce website, purchasing through Boise, purchasing through Fisher

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<b>Group 5: Payables</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Requisitions and Receiving—Accelerated</b>	4 hrs	Overview of purchasing process, navigation, creating requisitions, chart of accounts, approving requisitions, inquiry pages
<b>Accounts Payable:</b>		
<b>AP 100</b>	2 days	Overview of payables, navigation, creating vouchers, speedcharts
<b>AP 200</b>	1 day	Control groups, void check, stop payment, manual checks, matching, security, inquiry pages, reporting

<b>Group 6: Purchasing Inquiry Only</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Requisitions and Receiving Subset</b>	2 hrs	Instruction in “read only” use of Purchasing as well as an overview.

<b>Group 7: Campus Administration-Purchasing/Payables</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Requisitions and Receiving--Accelerated</b>	4 hrs	Overview of purchasing process, navigation, creating requisitions, chart of accounts, approving requisitions, inquiry pages
<b>Accounts Payable:</b>		
<b>AP 100</b>	2 days	Overview of payables, navigation, creating vouchers, speedcharts
<b>AP 200</b>	1 day	Control groups, void check, stop payment, manual checks, matching, security, inquiry pages, reporting, worklist
<b>Vendor Creation and Maintenance</b>	4 hrs	Creating vendors, maintaining vendors, vendor conversations, duplicate vendor reports

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<b>Group 8: Vendor Creation and Group 9: Vendor Maintenance</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Vendor Creation and Maintenance</b>	4 hrs	Creating vendors, maintaining vendors, vendor conversations, duplicate vendor reports

## General Ledger Courses

<b>Group 10 and 11: Journal Entry</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials
<b>Online JE &amp; Approval</b>	4 hrs	Chart of Accounts, PeopleSoft navigation; Entering, editing & submitting online journal entries; Copying journal entries; JE Approval via Worklist/workflow
<b>Journal Entry using Excel</b>	3 hrs	Preparing desktop to use Excel journal entry, creating Excel journal entries and uploading excel entries
<b>Using GL Inquiry Pages</b>	2 hrs	Chart of Accounts, instruction on using this tool that replaces WebFAST.

<b>Group 12: Journal Approval</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Online JE &amp; Approval</b>	4 hrs	Chart of Accounts, PeopleSoft navigation; Entering, editing & submitting online journal entries; Copying journal entries; JE Approval via Worklist/workflow
<b>Using GL Inquiry Pages - Demo</b>	2 hrs	Chart of Accounts, instruction on using this tool which replaces WebFAST.

<b>Group 13: GL Inquiry</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Using GL Inquiry Pages</b>	2 hrs	Chart of Accounts, instruction on using this tool which replaces WebFAST.

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<b>Group 14: Campus Accounting</b>		
<b>Classes Required</b>		
Class	Length	Description
<b>How Business Will Change</b>	1.5 hrs	Overview of how various tools and business will change as we implement PS Financials.
<b>Online JE &amp; Approval</b>	4 hrs	Chart of Accounts, PeopleSoft navigation; Entering, editing & submitting online journal entries; Copying journal entries; Worklist/workflow
<b>-OR-</b>		
<b>Accelerated Online &amp; Approval JE</b>	3 hrs	Combination of Excel & Online journal entry, Editing & Submitting journal entries and Approval
<b>Campus Accounting</b>	1 day	Posting journal entries, importing journal entries, standard journals, reporting
<b>Using GL Inquiry Pages</b>	2 hrs	Chart of Accounts, instruction on using this tool which replaces WebFAST.

## Class Enrollments

### How Business Will Change in UMS All Groups

Campus	Number Identified
UMA	131
UMF	150
UMFK	49
UMPI	66
UMM	54
UM	920
USM	494
SWS	65
UCO	38

### General Ledger Inquiry Pages Group 13

This group of people will have inquiry access to pages developed for the Financials implementation. These pages replace WebFAST. Below is a chart indicating the number of users per campus that have been identified as needing training in the General Ledger Inquiry Pages. These numbers may vary slightly as users are identified or are removed closer to go-live. For a list of users by name, see Financials/Phase I/Users-Roles/ at <https://erpdocs.maine.edu>. Each campus has a spreadsheet of users by roles. This website is password protected. Contact the Training Team if you have questions about specific users.

Campus	Number Identified
UMA	125
UMF	149
UMFK	46
UMPI	65
UMM	38
UM	631
USM	479
SWS	63
UCO	40

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## General Ledger Users Groups 10-12, 14

These users will enter journal entries online or using Excel. The following chart identifies the users at each campus in each role/class. These numbers may vary slightly as users are identified or are removed closer to go-live. For a list of users by name, see Financials/Phase I/Users-Roles/ at <https://erpdocs.maine.edu>. Each campus has a spreadsheet of users by roles. This website is password protected. Contact the Training Team if you have questions about specific users.

Campus	Excel Only	Online JE	JE Approval	Campus Accounting
UMA	30	5	4	3
UMF	37	7	3	3
UMFK	4	4	3	2
UMPI	7	6	6	2
UMM	5	3	2	2
UM		40	40	2
USM	4	27	27	8
SWS	30	8	6	6
UCO		3	3	3

## Purchasing Users Groups 1-9

Purchasing Users are those who create requisitions, receive goods, approve requisitions or view Purchasing data. The numbers in the chart below may vary slightly as users are identified or are removed closer to go-live. For a list of users by name, see Financials/Phase I/Users-Roles/ at <https://erpdocs.maine.edu>. Each campus has a spreadsheet of users by roles. This website is password protected. Contact the Training Team if you have questions about specific users.

Campus	Requisitions & Receiving	Requisition Approval	Payables	Vendor Creation	Vendor Maintenance	Campus Administration	e-Commerce
UMA	68	4	9	5	5	6	
UMF	57	21	7	4	4	3	
UMFK	24	17	2	1	1	3	
UMPI	32	2	3	5	5	2	32
UMM	46	27	6	4	4	3	
UM	286	6	21	12	24	3	226
USM	70	27	17	4	4	2	70
SWS	7	4	3	1	1	1	
UCO	35	3	3	4	4	3	

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## Training the Trainers

### Trainers for “How Business Will Change in UMS”

The following UMS employees have been identified as trainers for the “How Business Will Change in UMS” class.

Institution	Name
Augusta	Carol O'Donnell, Kim Dulac, Priscilla Costello
Farmington	Sharon Nadeau
Fort Kent	Tamara Mitchell, Jeanita Theriault, Nicki Ouellette
Machias	Joan Getchell, Tom Potter
Orono	Claire Strickland, Suzanne Paonessa, David Scheidt, Bob Eslin, Kate Van Dine
Presque Isle	Charlie Bonin, Lida Pinkham, Eldon Levesque
Southern Maine	Donna Somma, Marty Berry, Jennifer Crichton, David Crumb, Nancy Pratt, Cindy Quinn
SWS	Kitty Armstrong, Bobbi Jeffrey-Gant
University College Outreach	Judy Jewell, Ruth Turcotte

### Trainers for “GL Inquiry Pages”

Institution	Name
Augusta	Carol O'Donnell, Kim Dulac, Priscilla Costello, Sheila Vigue, Dick Campbell
Farmington	Sharon Nadeau
Fort Kent	Tamara Mitchell, Jeanita Theriault, Nicki Ouellette
Machias	Tom Potter
Orono	Claire Strickland, Suzanne Paonessa
Presque Isle	Eldon Levesque, Lida Pinkham, Charlie Bonin
Southern Maine	Larry Waxler, Donna Somma, Marty Berry, Jennifer Crichton, David Crumb, Nancy Pratt
SWS	Project training staff
University College Outreach	Judy Jewell, Ruth Turcotte

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## Trainers for Journal Entry Online, Excel and Approval

Institution	Name
Augusta	Carol O'Donnell, Kim Dulac, Priscilla Costello, Sheila Vigue, Dick Campbell
Farmington	Sharon Nadeau
Fort Kent	Tamara Mitchell, Jeanita Theriault, Nicki Ouellette
Machias	Tom Potter
Orono	Claire Strickland, Suzanne Paonessa
Presque Isle	Eldon Levesque, Lida Pinkham, Charlie Bonin
Southern Maine	Larry Waxler, Marty Berry, Jennifer Crichton, David Crumb, Nancy Pratt, Virginia Johnson, Holly Spencer
SWS	Project training staff
University College Outreach	Judy Jewell, Ruth Turcotte

## Trainers for Requisitions and Receiving, Approving Requisitions, e-Commerce

Institution	Name
Augusta	Carol O'Donnell, Kim Dulac, Priscilla Costello
Farmington	Sharon Nadeau
Fort Kent	Tamara Mitchell, Jeanita Theriault, Nicki Ouellette
Machias	Joan Getchell
Orono	Bob Eslin, Kate Van Dine, Rick Guthrie, Anne-Marie Nadeau, Paula Taylor, Hal Wells, Paul Kosobud, Cindy Carusi
Presque Isle	Eldon Levesque, Lida Pinkham, Charlie Bonin
Southern Maine	George Higgins, Gregg Allen, Bonnie Cole, Sarah Hopkins
SWS	Project training staff
University College Outreach	Judy Jewell, Ruth Turcotte

The Train the Trainer process encompasses:

- Learn PeopleSoft fundamentals by attending in-house instruction.
- Participate in User Acceptance Testing.
- Identify users on your campus requiring training.
- Schedule classroom space on your campus.
- Schedule people into specific training times.
- Practice the presentation.
- Deliver the training.

Each of the above items is a step-by-step process with the end result that each participant becomes a system "expert".

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## Training Schedule

Training delivery focuses on end-user roles and responsibilities. To be as effective as possible, training will be delivered as close to actual go-live date as permissible. This ensures that the training is delivered “just-in-time.” Just-in-time” training facilitates maximum retention. Ideally, upon the successful completion of a course, end-users will return to their work areas with access to the PeopleSoft system.

Courses are designed to effectively train the required number of users. The length of time for each course is determined in great part by the size of the audience and availability of instructors. By delivering training in groups, UMS will be able to concentrate the training where it is needed most, when it is needed most. Following is a brief description of the training schedule approach.

## Schedule of Training Classes

Tasks	Date	Comments
How Business Will Change in UMS Train the Trainer	Aug 4, 2004	Board of Trustees Conference Room
How Business Will Change in UMS	Beginning Aug 16, 2004	Scheduled by campuses
Journal Entry Online, Excel and Approval for Trainers	Dec.9 (Augusta) Dec.20-21 (Orono)  April 7 (Augusta)	8:30am – 4:30pm Katz Library, Room 212  Time & place TBD
Requisitions, Receiving and Requisition Approval for Trainers	Dec. 7-8 (Orono) Dec.14-15 (Augusta)	9:00am-4:00pm 228 Merrill 8:30am-1:30pm 212 Katz
GL Inquiry Pages for Trainers	Jan. 24 (Orono)	1:30pm – 4:00pm 228 Merrill Hall
* e-Commerce Training for Trainers	<b>Postponed</b>	
Requisitions and Receiving—Accelerated	Jan. 4 (Orono) Jan. 7 (Orono) Jan. 28 (USM) Feb. 4 (BSB)	9am-1pm 228 Merrill 9am-1pm 228 Merrill 9am-1pm 518Glickman, Port. <b>SNOW Day</b>
Accounts Payable AP 100	Jan. 11-12 (Augusta) Jan. 13-14 (Orono) Feb. 22-23 (BSB)+  Apr. 12-13 (USM)	8:30am-4:30pm 255 StuTech* 8:30am-4:30pm 228 Merrill 8:30am-4:30pm BSB  8:30am-4:30pm, 219 Bailey, Gorham +BSB is Bangor Savings Bank *StuTech is Student Tech Center
AP 200 – Not required. Cancelled		
Journal Entry and Excel, Approval -- Accelerated	Jan. 5 (Orono)	9:00am – 12:00pm 228 Merrill Hall
Campus Accounting	Jan. 25 (Texas Ave. )	10:00am – 4:00pm 65 Texas Ave., Meeting Room
*Campus Purchasing/Payables Administration	<b>Documentation only</b>	

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Vendor Creation and Maintenance	Jan. 4 (Orono) Jan. 5 (Augusta) Apr. 26 (USM) May 3 (Orono) May 4 (SWS at Orono)	8:30am-12:30pm 111 DPCorbett 8:30am-12:30pm 253 Student Tech Center 8:30am-12:30pm 219 Bailey, Gorham 8:30am-12:30pm 228 Merrill 8:30am-12:30pm 228 Merrill
Journal Entry using Excel	Beginning April, 2005	Scheduled by campuses
Journal Entry Online & Approval	Beginning April, 2005	Scheduled by campuses
Requisitions and Receiving	Beginning April, 2005	Scheduled by campuses
Approving Requisitions	Beginning April, 2005	Scheduled by campuses
* e-Commerce	<b>Postponed</b>	
GL Inquiry Pages, Demo and Hands on	Beginning April Mar 25 (Hands on) Apr 26 SWS (Demo) Apr 28 SWS (Demo) May 3 (Hands on)	Scheduled by campuses 9am-noon, Bangor Savings Bank 9am-11am, Board of Trustees conf. room 10am-noon, Board of Trustees conf. room BSB
Travel & Expenses Administration	May 18	9:30am-12:30pm, 318 Boardman, UM
Travel & Expenses Self-Service (Demo)	May 16 (SWS) May 19 (SWS) June 8	10am-noon, 107 Maine BOT conf. room 10am-noon, 107 Maine Ave. BOT conf. room 9am-11am, Large conf. room, UMA Student Center
Travel & Expenses Self-Service (Hands on)	May 25	1pm-3pm, BSB
Requisitions and Receiving (SWS)	May 25-26	9am-4pm first day, 9am-noon second day, 318 Boardman, UM
Requisition Approval (SWS)	May 26	1pm-4pm, 318 Boardman, UM
Help Desk Training	Beginning June 14, 2005	
SWS Inquiries	Jun. 15	8:30am-12:30pm, 228 Merrill, UM
SWS Reports (Demo)	Jun 22	BOT conf. room
SWS Online JE & Approval (2 sessions)	May 23 May 24	1pm-4pm, 318 Boardman, UM 9am-noon, 318 Boardman, UM
SWS Excel JE	May 24	1pm-4pm, 318 Boardman, UM