



TRAIN

How do institutions support their communities to begin using a new system? While training is a component, there is much more to this process. Has the system been designed in an intuitive fashion that allows staff to feel comfortable quickly using the system? Is the new system the only change, or are there significant business process changes as well? How have the changes been communicated to create a positive environment for change?

Fundamentally, how has the institution managed this change and prepared its staff for success?



TRAIN COLORADO STATE UNIVERSITY

The CSU project team developed a thorough strategy to engage the campus in the Kuali implementation. This included broad participation in Kuali Days, use of the rSmart Proof of Concept experience that allowed early use of the system, and the creation of an inspiring and comprehensive communication plan.

Colorado State's approach to training supported the strategy for engaging the campus community. Controller Lynn Johnson led the training efforts. Ms. Johnson explains, "We were very pleased with the results of our training process. We were able to cultivate Kuali experts throughout our user community as they became trainers. Our campus trained our campus."

The training approach included three discrete segments: an overview of the system and plans, a detailed presentation of the functionality, and a hands-on lab experience.

The full user community participated in the project kick-off. Campus administrative leaders presented the Kuali Financial System to the com-

munity, including the case for change, the benefits of the system and the plan for moving to the Kuali Financial System. Then they oriented users, describing what to expect from the new system – what was changing and what was staying the same.

Members of the central finance organization and the campus finance users developed the presentation portion of the training. One subcommittee was formed for each eDoc or major process within the Kuali Financial System. Subcommittees worked with the new system, identified the changes from the prior system, and captured this content in a PowerPoint presentation. They delivered this information to user groups in a presentation and discussion setting.

"Our users found it very helpful to separate learning about the system from using the system. It allowed them to orient themselves before diving into transactions," explains Ms. Johnson.

Finally, the training teams provided a hands-on lab experience. Having already received a



broad understanding from the presentation sessions, users were able to complete transactions and gain live experience with the system.

The value of the three-stage training was evident. “When we got into the lab, there were a few users who clearly had not attended any of the previous sessions and we had a moment of panic, but they were few,” says Ms. Johnson. “Most of the staff had a good understanding of the system and found it easy to navigate. We were able to focus on those who were coming late into the process and bring them up to speed.”

Keys to Success

The CSU team believes that others implementing the Kualo Financial System, particularly those institutions migrating from FRS, could easily leverage both the team's training approach and training materials.

The training presentations are all openly available at kuali.colostate.edu



TRAIN

SAN JOAQUIN DELTA COLLEGE

The training process for San Joaquin Delta College was tightly coupled with implementation planning and communication efforts.

When Delta convened its Kualo implementation team, the group required a common understanding of the system. rSmart provided a broad training to the members of the project team. This training described the system design, the key components, and the match to higher education financial processes. This training provided the team with a common and broad knowledge base of the Kualo Financial System and allowed the team to focus on specific elements of implementation planning.

The change that Delta sought through its implementation was more than simply a new finance system. President Raúl Rodríguez and Dr. Jon C. Stephens, Vice President of Business Services, sought fundamental changes in the college's business processes, for the purpose of creating more empowered and distributed financial management. With this goal in mind, the project team developed a fiscal officer training and certification process in order to support the effectiveness of fiscal officers. Training sessions provided the case for change to the decentralized approach. Fiscal officers learned new processes,

new responsibilities, and how the Kualo Financial System would support their success.

Training the Delta functional users on the Kualo Financial System was a community endeavor, leveraging the strengths of Delta's functional and technical Kualo experts, the rSmart team and contributors from around the Kualo community. Experts from Indiana University and Michigan State University participated in training Delta College's financial system users.

Time for the training was compressed as the timing of the Kualo Financial System release caused Delta College's go-live date to be very tight. Users gained significant experience and training on the Kualo Financial System through the testing process. The rSmart team developed test plans and scripts and completed initial testing to address system issues and defects. rSmart trained Delta's functional leads on the system and test plans, and then engaged that group in testing and training. Maria Bernadino, Director of Purchasing, was a leader in this process: "The testing experience provided hands-on training and created comfort with the system. Our users felt very comfortable navigating their work using the new system. While our timeline was rushed, it was an efficient way to learn the system."



Training Development and Delivery Owners

Training Activities	Delta Experts	rSmart Team	Kuali Community
Define outline for user training	X	X	
Assign training topics to experts		X	
Prepare trainers		X	
Develop training materials	X	X	X
Present training to users	X	X	X



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rSmart has found that institutions benefit from training on the Kualu Financial System at a variety of different points in the evaluation and implementation process.

There is benefit in providing early, broad training to project leaders. Whether the group is a formally sanctioned project team or a group of early advocates, the team can make better decisions about the path forward with a broad and common understanding of the Kualu Financial System.

As part of the initial Proof of Concept evaluation, rSmart trains users in the basic functions of the system. This allows users to have a hands-on experience with the system, using their own data. The opportunity to navigate and experience the system builds confidence and excitement across the user base.

rSmart has contributed to end-user training in a variety of ways. Both San Joaquin Delta and Colorado State benefited from having lead users actively engage in training the broader user community. These lead users are often juggling many responsibilities, and rSmart can support them and set them up for success in their training role.

At each point in the evaluation and implementation process, rSmart will assist by providing the training needed for confidence and success.



