THE *Training* GUIDE

Spring 1999

STUDENT 2000 PROJECT TRAINING

Holly Reed, Trainer,
Student 2000 Project.

LEARNER-CENTERED ENVIRONMENT

FOCUSED ON PROVIDING PEOPLESOFT SKILLS

HANDS-ON TRAINING EXPERIENCE

INTERACTION WITH APPROACHABLE TRAINERS AND PEERS

INVESTING IN SKILLS, KNOWLEDGE, AND PRODUCTIVITY

"Through new technology and staff training, the Enterprise Systems Project will support great service to students, faculty and staff."

Enterprise Systems Project

More Mission. Better Service. Fewer Obstacles.

UNIVERSITY OF MINNESOTA

This is a publication of the Enterprise Systems Project Communications Team and the Student 2000 Training Team. For more information, contact Venoreen Browne-Boatswain at 612-625-4056 or brown239@sossgw.stu.umn.edu.

This publication is available in alternate formats.

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THE GUIDE

to preparing for the Student 2000 Project Training.

*The **Enterprise Systems Project** (ESP) is charged with redesigning the University of Minnesota's information systems, policies, and business practices. Our goal is to provide a coherent business infrastructure that supports a customer-oriented and information-rich environment.*

Much of the training in student services is centered on the PeopleSoft system, which replaces over 30 current student services and human resources data bases. The PeopleSoft system consolidates all the information into one integrated data base, increasing ease of access to data and the accuracy of information.

All users of the new system will be enrolled in introductory training through the Enterprise Systems Project. This training includes navigating within the PeopleSoft system, with additional classes for specific business processes in student services.

Training on the new system is scheduled just prior to the system implementation in each functional area. We encourage everyone to fulfill their responsibility by preparing for the training sessions before entering the classroom.

PREPARE FOR TRAINING NOW BY:

- Becoming properly informed of the new customer service technologies and practices in student services by reading the Student 2000 Project Web site.
- Fulfilling the prerequisites for training classes and tutorial. See the "Prerequisites for Training" later in this Guide.
- Completing the full training sessions as assigned.
- After training, using the new system/business practices to offer greater assistance to students, faculty, and other customers.

What's in a Name?

The Enterprise System Project, Student 2000 Project, and PeopleSoft are often used interchangeably. However, each has its separate role:

- PeopleSoft is the name of the new system's software.
- The Student 2000 Project is the group of University staff charged with implementing the new information and business systems for student services.
- The Enterprise Systems Project is the umbrella body coordinating the change efforts in Finance, Human Resources, Grants Management, and Student Administration to provide improved services to all customers of the University. The Enterprise Systems improvements include changing to a new information system, achieving Year 2000 compliance, redesigning business procedures across the University, and converting to a semester curriculum.

Who Needs to Be Trained?

If you currently use one of the major data bases (SDB, ADM, SAM, STARS) being replaced, you must attend training. Staff who have access to any current data base will receive training first. Staff who do not currently have access to a data base under their own name, but need access to PeopleSoft, may be trained at a later date. Student workers will not be formally trained (it is the responsibility of the department to internally train student workers).

When you are registered for a specific training class, please accept the invitation in a timely manner and attend all the training sessions assigned. There will be nearly 2,000 staff members enrolled in classes. Missed training classes may not easily be rescheduled. You will not have access to PeopleSoft until after training sessions are complete. Access to student information for your job will not be given if training sessions are missed.

Training Outline

The Student 2000 Project's prime objective is to redesign and upgrade the student information systems to improve service across the University. The PeopleSoft system will do this by integrating the data bases into one system accessed by many staffmembers.

The training you will receive will focus on working with PeopleSoft to use and maintain student data. Training is tailored to provide the specific type of information that you require for your duties and departmental structure.

I. Introduction to the Enterprise Systems Project

This is a prerequisite class geared to all users of the new PeopleSoft system. In the Introduction, trainees will learn about the goals and rationale of the Enterprise Systems Project and receive an overview of the PeopleSoft system and its Campus Community module.

II. Business Process Classes

These classes provide specific training in the separate functions in student administration that will require access to PeopleSoft. Based on your job duties, you may take one or several of the business processes classes listed below.

Course Catalog and Class Schedule Production

Training for Course and Class (A-96, CTAD, etc.) has been completed. Some view-only training will be provided in March 1999. Class length is four hours.

Change of Program (formerly IUT)

Training for Change of Program has been completed.

Pre-registration

Topics include adding/removing holds (Service Indicators) and tracking flags (Student Groups) from a student record, creating magic numbers (Class Permission numbers), and more. Training will begin in January and continue through March 1999. Prospective trainees mostly include those with access to Student Data base screens 11, 57, 58, 59, 60, and 61. Class length is four hours.

Registration

Topics of this class include how to register a student, special registrations, and quick admits (similar to current UC and summer-only registrations), etc. Training will continue through May 1999. Prospective trainees mostly include those with access to Student data base screens 50 and 56, as well as those who register students for extension classes.

Post-registration

Topics include entering/changing grades, academic standing, transcript production, certification letter production, and more. Training will begin in May or June 1999. Prospective trainees include OTR staff, some advisers, and other collegiate/department staff.

Student Records Class 4

Unnamed as of yet, this class is tentatively slated to begin in November 1999. The topics include honors and awards, repeat checking, and student milestones.

Admissions Recruitment

The Admissions Recruitment Module is geared to individuals who work directly with the admissions recruitment process. The following topics are addressed: Adding prospective students, extracurricular activities, self reported class ranks and test scores, communicating with a prospective student, adding and maintaining external organizations, planning, scheduling and viewing events, and recruitment territory management. Class length is eight hours.

Application Processing I

This training is for staff who enter information on application processing, such as orientation support for undergraduate, graduate, and professional students. The following topics are addressed: Adding applicants and new programs, adding legal agents, adding previous college information, sending letters, residency, test scores, missing information, and publications. Class length is eight hours.

Admissions View Access

View Access training is intended for those individuals who will refer to PeopleSoft but will not input data on a regular basis. Topics to be addressed: Viewing application, test summary, education summary and application progression, residency information, communication, checklist summary, service indicators, student groups, and application fees. Class length is four hours.

Financial Aid Overview 1

This class is for current users of the SAM system. Topics to be addressed include: Financial aid menu groups, ISIR information/ correction panels, Financial Aid Term, Student Budgets, and the three C's (Communications, Checklists, Comments). Class length is four hours.

Financial Aid Details 1

This class is intended for staff working in the Financial Aid offices on all campuses. This is job-specific training regarding the functions introduced in Financial Aid Overview 1, which is a prerequisite to this class. Class length is four hours.

Financial Aid Overview 2

This class is intended for those with current access to the SAM system. The following processes will be covered in this session: Packaging, Service Indicators, and FAN letters. Classes begin in April 1999.

Financial Aid Details 2

This class is for staff working in the Financial Aid offices on all campuses. This is job-specific training regarding the functions introduced in Financial Aid Overview 2, which is a prerequisite to this class. Class length is about four hours. Classes begin in April 1999.

Financial Aid Overview 3

This class is intended for those with current access to the SAM system. The following process will be covered in this session: Disbursement, Loans and Repayment. Class length is about four hours. Classes begin in June 1999.

Financial Aid Details 3

This class is intended for staff working in the Financial Aid offices on all campuses. This is job-specific training regarding the functions introduced in Financial Aid Overview 3, which is a prerequisite to this class. Class length is four hours. Classes begin in July 1999.

Financial Aid View Access

This class is intended for staff with view-only access to the Financial Aid module. Class length is about four hours. Classes begin in August 1999.

Student Financials Overview and Inquiry

This class is intended for those individuals who have current STARS access and use screens 03 and 06. Topics to be addressed: viewing student accounts, account status and transaction summary; overview of processes including tuition calculation, billing, and refunding. Class length is about four hours. Classes begin June 1999.

Transaction Posting I

This class is intended for those individuals with STARS access who use screens 08 and 41. Topics to be addressed include quick post and group posting. Class length is four hours. Classes begin June 1999.

Transaction Posting II

Batch posting is for users who are responsible for reconciling transactions generated from an external source. Class length is four hours. Classes begin June 1999.

Third Party Billing Contracts

This class is designed for users who accept authorizations for billing to a third party. Class length is four hours. Classes begin June 1999.

Item Type Setup

This class is designed for a limited number of users who will have the capability to set up item types. Class length is four hours. Classes begin June 1999.

Refunding

This class is targeted for users who have the authorization to process refunds. Topics will include both on-line and batch refunds. Class length is four hours. Classes begin June 1999.

Advising

This class is designed for staff who perform student advising functions. Sessions will cover viewing and/or updating of advising-relevant information from several student system areas. Classes begin April 1999.

Course View Access

This class is intended for staff working with course catalog and class schedule information at department or college levels. Some topics to be addressed: View Course Catalog, Class Schedule, Instructor Schedules, Course Guide, and Class Roster. Class length is four hours.

III. Classes via the Internet

Select Student Records training classes will be available on the Internet beginning in Spring of 1999.

Prerequisites to Training

Windows 95

To prepare for training, competency in Windows 95 is required. PeopleSoft is based on a Windows environment, and users of PeopleSoft need to have an operational knowledge of Windows 95. All campuses have departments (usually the offices of information technology or equivalent) which offer Windows training.

PeopleSoft 7.0 Tutorial

This tutorial teaches basic navigation in the PeopleSoft system. The tutorial is written in an easy step-by-step process with review questions to test your knowledge of the navigation process. Practicing navigation prior to attending training makes the navigation of the system in class much easier. The tutorial can be reached from the Student 2000 Training Home Page at **http://www.umn.edu/esptrain/**.

Campus Community Overview

This tutorial provides basic overview of Campus community, the warehouse of all student and staff demographic records. Training also provides the user with various new terminology and review questions to reinforce operational knowledge. The Campus Community tutorial can also be reached from the **http://www.umn.edu/esptrain/**.

Workstation

Your workstation needs to be adequate in order to run PeopleSoft at your desk after training is complete. Please see your department administrator to ensure that all requirements are met.

- **Hardware:** PeopleSoft may require installation on your computer and wiring in your office. Each department will manage how the new system will be integrated into existing technology. However, your own computer may need to be upgraded to run the system. For more information see Enterprise technology specifications at **http://www1.umn.edu/enterprise/technology/psreqs.html** or **http://www1.umn.edu/enterprise/technology/techFAQ.html**

- **Security Access:** The trainer for the functional area will contact training participants regarding the date, time, and location of the training sessions. All individuals attending training must sign an OIT Access Request form, and a production ID and password will be assigned later and mailed directly to the user. The process for installing PeopleSoft on computers and assigning individual staff members to training is coordinated by your department administrators and Student 2000 staff.

The Training Experience

The Class

Training classes offer hands-on, personal instruction on how to use and navigate the PeopleSoft system by knowledgeable instructors from each functional area. Classes are small; each computer lab is equipped with ten to twenty-five computer workstations. The instructor projects a computer screen overhead for all to see, while trainees follow on their own computers. A training manual is provided for each class that closely follows the instruction. Trainees keep the manuals to use as a reference and refresher once they return to their office.

The Instructors

A pair of instructors teach most training sessions. While one instructor facilitates the class session and guides people through the PeopleSoft via the overhead projection, a second instructor is available "on the ground" to help individuals one-on-one. Instructors represent all functional areas within Student Administration and are assigned to classes according to their areas of expertise.

Training Locations

Training classes are currently held at two locations on the Twin Cities campus and one each at the Duluth, Crookston and Morris campuses.

Twin Cities Training Labs:

- 2221 University Avenue S.E. Room 300, on the Minneapolis East Bank Campus (at Huron Ave., east of Williams Arena). Parking is available in the University Huron Avenue Lot, just north of the building. Do not park in the 2221 Building parking lot in the rear; it is reserved parking and your car will be towed. Please bring your parking tickets to the training classroom for validation.

- West Bank Office Building Room 531, near the Minneapolis West Bank (west of 35W). Parking is available in the attached parking ramp. Parking validation will be providing after the training session. Please bring your parking tickets to the training classroom for validation.

Duluth Training Lab:

CPD Labs, Room 42 in the Campus Center Wedge. The CPD Lab has 20 stations.

Crookston Training Lab:

Dowell 102. The lab has 25 stations.

Morris Training Lab:

Behmler Hall, Room 39. The lab has 10 stations.

Life after Training

After you complete a training session, it is important to keep practicing with PeopleSoft and to immediately begin thinking of how your job routine will change due to the new system changes.

Updated versions of manuals will be available to keep current with any changes in PeopleSoft. Also, updates on current training-related issues will be posted on this website on a regular basis.

The challenge of acquiring new skills and knowledge is a part of all jobs. Learning these skills demands increased flexibility in the workplace to practice and become comfortable with the new system. While the classroom will provide basic knowledge, the limited time spent in a classroom will not allow trainees to achieve full mastery of the system operations. An effort must be made by everyone to practice the skills, and supervisors must be supportive and patient as staff members develop expertise. Trainers are always available to help along the way.

Practice, Practice, Practice

The HETPLY data base will be available to you at your desk immediately following your business process training. It is not real production data, but it mirrors the training data base, and it can be used to practice what you have learned in training. You are strongly encouraged to use the data base to run through the practice exercises provided in the Training Manual. The information in HETPLY can be updated and viewed, but it is refreshed (replaced with new data) every evening.

Important web sites:

Student 2000 Project web site:

http://www.umn.edu/s2000/

An overview of the Student 2000 Project, from its beginnings in 1995 to this week's developments.

Training web site:

http://www.umn.edu/esptrain/

The Training website not only offers information about preparing for the changes ahead but also serves as a resource after training. This is your source for updates on training issues, access to current training manuals, help desks, and other resources for Human Resources and Student .

Glossary web site:

http://www.umn.edu/glossary/

The glossary contains descriptions of the technical, computer, academic, and business terminology (and acronyms) related to the Enterprise Systems Project.

Enterprise Systems Project web site:

http://www.umn.edu/enterprise/

The ESP site provides an overview of the entire project and links to the Human Resources Management System (HRMS), Student 2000 Project, Grants Management, Financial Systems, Help! Desk, and technical infrastructure projects. Check here for desktop and network requirements for running PeopleSoft.

Human Resources Management System:

http://www.umn.edu/ohr/hrms/

The HRMS web page provides an overview of the systems and business changes pertaining to human resources.

The Help! Desk:

http://www.umn.edu/enterprise/help/

A great help to users. This site describes services available to users with questions and technical and/or performance problems. A list of Frequently Asked Questions covers everything you'll want to know.

Student 2000 Project Training Contacts List

http://www.umn.edu/esptrain/

	Financial Aid	Admissions	Student Financials	Student Records
More Information	http://www.umn.edu/esptrain/			
Project Director	Roberta Armstrong r-arms@tc.umn.edu 612-625-6674			
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Security & Access	**Departments will be contacted for initial access. For password problems, go to the Help Desk at www.umn.edu/enterprise/help** 612-624-0555			
Current Applications Support	**Mark Powell** m-powe@tc.umn.edu 612-625-4056			
Technology Changes & Installation Information	**The Help Desk** www.umn.edu/enterprise/help 612-624-0555			