



CTCLINK TRAINING APPROACH

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Background

Based on lessons learned from ctcLink delivered trainings and pilot college experience, the ctcLink Project Training office revised its training approach. With the ctcLink implementation model, neither a “regional trainer” plan nor a “deployment-group-by-deployment-group” training approach could be sustained or succeed.

Instead, this revised approach allows end-users increased exposure to material through online learning paired with in-person workshops. It was determined end-users would find learning necessary materials difficult with the original training approaches.

A New Approach

A flipped classroom or hybrid model of distance learning will be introduced, in which the user completes most coursework online and also attends instructor-led workshops remotely through WebEx.

Required materials will be available through Canvas, the colleges’ online learning management system. The majority of a student’s experience will be self-paced learning, with workshops offered for topics and concepts best taught through Instructor-led Training (ILT). ILT workshops will be offered remotely through WebEx, with staff attending from their own campuses.

This training approach offers open access for all users – subject matter experts (SMEs), new employees, employees transitioning into new roles and those needing refresher training – to a majority of the training materials. Canvas courses can be accessed and completed by all users, regardless of deployment group.

Each course will offer content in various media (e.g. text, video, simulation), as well as assessments to measure comprehension.

Courses with an instructor-led component allow for a deeper understanding of a specific topic. Instructor-led (ILT) workshop attendance will be based on these priorities:

- Current deployment group in the Implementation Phases
- New employees from live ctcLink colleges
- Future deployment groups

This hybrid approach also allows a more direct avenue to courses for staff engaged in their college’s PeopleSoft (PS) implementation. These SMEs will be enrolled in both the online component as well as the ILT workshops to prepare them for the roles in the PS system.

Training Scope

The ctcLink Project will deliver training for general PeopleSoft processes as well as system functionality for all PeopleSoft pillars.

Applications to integrate online admissions, continuing education, mobile platforms or planning and budgeting are also included in the ctcLink scope of training. The Washington State Board for Community and Technical Colleges (SBCTC) will deliver training for integrated solutions such as facilities management, room scheduling, reporting/analytics and security. Each institution is

responsible for college-specific business processes, as well as third-party applications and systems training delivery.

Out of scope for ctcLink training

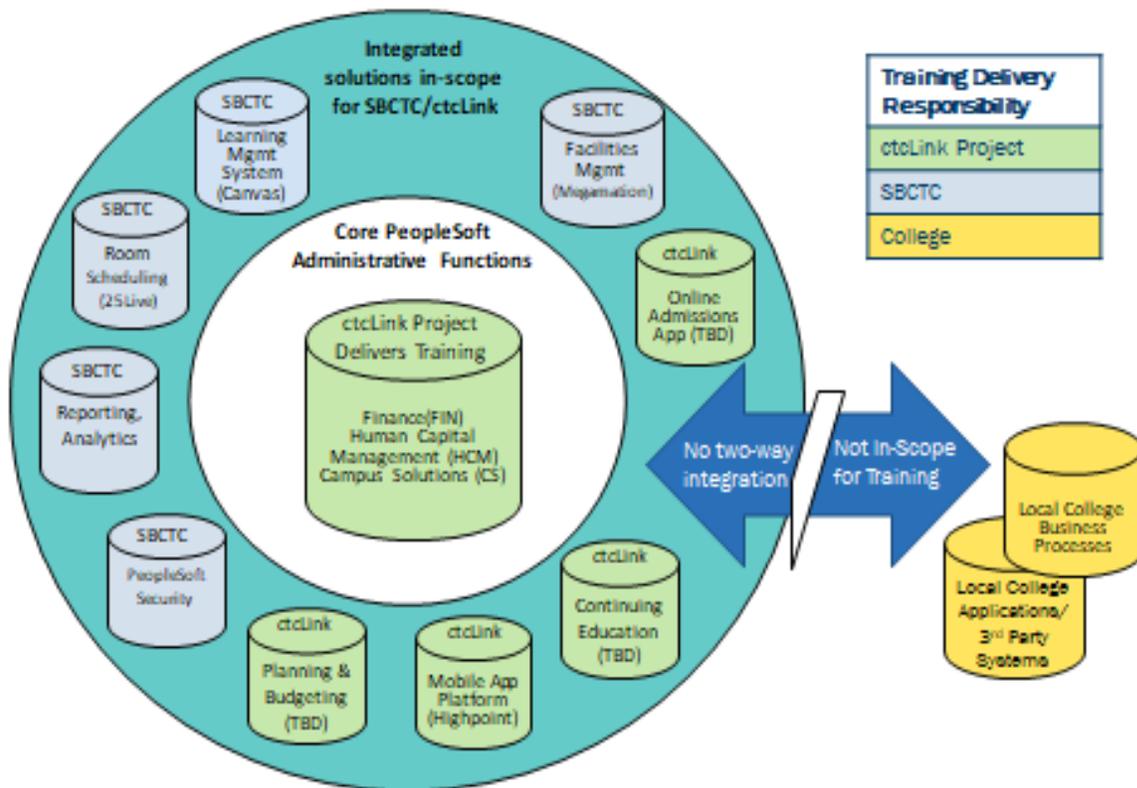
- Local business process training
- Third-party applications not part of the project implementation

In scope for ctcLink training

As illustrated in Figure 1, certain solutions and administrative functions are in scope:

- System functionality
- PeopleSoft processes
- Effective training techniques

Figure 1: ctcLink Training Scope



Role of the Colleges

Collaboration between the colleges and the ctcLink Training team is essential for this approach to succeed. The ctcLink Training team will work with colleges to implement this approach, as they have insight into their individual campus needs.

Training Lead

Each college will have a campus Training Lead to ensure coordination of College Facilitators for training sessions, logistical needs, and communication with SBCTC Training Team. This role is integral to a successful training delivery program for the college.

See [Appendix A](#) for detailed College Training Lead responsibilities.

College Training Facilitators

College Facilitators with subject matter expertise on each campus will be essential in the success of PeopleSoft training activities. College Facilitators will assist the SBCTC Training Team with analysis and validation of online Canvas training courses. College Facilitators will collaborate with the SBCTC Trainers during the ILT workshops to ensure the knowledge transfer is effective and participants are getting the maximum benefit. The SBCTC Training Team will work with the College Training Lead to identify and select College Facilitators for training.

For College Facilitators to have the greatest potential for success, they should be a subject matter expert (SME) in their respective area(s) of Finance, Student Services or Human Resources.

Because there are several courses for each subject area, their Legacy system (FMS, SMS, FAM, PPMS) expertise will dictate which courses – called modules – they will be qualified to assist with.

See [Appendix B](#) for list of over 60 total courses.

College Facilitators should have the following characteristics:

- Experience in facilitating training or strong customer service skills in subject area
- Strong communication and interpersonal skills
- Ability to commit time (outlined below) to learn the ctcLink system
- Ability to commit to learning teaching and facilitating skills
- Ability to commit to co-teaching with SBCTC Trainers
- Excellent verbal and interpersonal skills
- Willingness to learn complex technical and functional concepts
- Strong working knowledge and understanding of Legacy system

College Validation

Colleges will collaborate with SBCTC to validate training materials. College Facilitators from DG2 and DG3 colleges may assist in validating training content by piloting several Canvas courses. Once training courses are reviewed and feedback is given by these colleges, content will be updated and approved to meet established standards or outcomes.

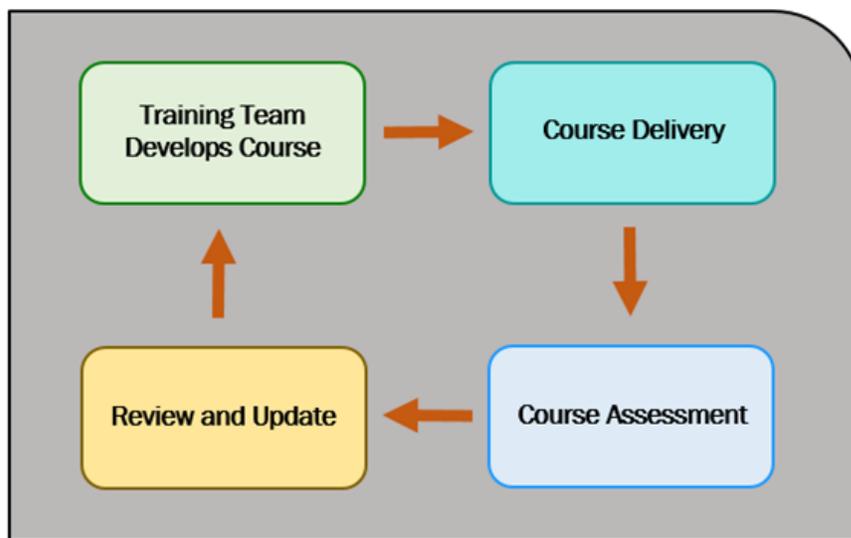
Training Phases

As depicted below (Fig. 2), the ctcLink Training Team will approach training for the ctcLink implementation in phases.

- Development
- Delivery
- Assessment
- Review/Update

This Training Approach will include an introduction to this training concept, how it will be organized and developed, and the various dependencies involved in the success of this approach.

Figure 2: ctcLink Training Phased Approach



Training Development

Developing training is the most time-consuming phase of the training process and involves the most human and material resources. During this initial phase, the ctcLink Training Team will create new and update existing materials, create learning exercises and work with SMEs to prepare end-users to perform processes in the PeopleSoft application.

Coordination to ensure college facilitators are included in the development, analysis and testing of materials is important. This will not only help spread the workload, but also expose college facilitators to course materials, which will give them a head start on learning the system and processes.

This head start allows college facilitators an opportunity to consider their college's culture, while simultaneously ensuring materials will engage participants.

Curated content includes:

- **Course curriculum:** activities and content delivered for a particular course of study or program
- **Course outcomes:** identifies essential information and processes that are important for the learner to understand and accurately demonstrate by the conclusion of the course
- **Course assessments:** evaluations of the learner’s readiness, learning progress, or skill acquisition
- **Quick Reference Guides (QRGs):** stored in the [ctcLink Reference Center](#)
- **Videos:** for visual representation of lessons
- **Interactive exercises (simulations):** hands-on learning activities
- **Slide Deck (PowerPoints):** presentation/slide show used in lectures
- **Schedule of course offerings**
- **Additional resources (handouts):** tip sheets, navigation guides, business process maps, instructor guides
- **Canvas course build**

Upon completion of Canvas training courses, College Facilitators will pilot each course to check for quality assurance, accurate knowledge transfer and user engagement.

The SBCTC Training Team and College Facilitators will collaborate to update content and ensure feedback and suggestions are implemented.

Training Delivery

Training will be delivered through a “flipped classroom” or hybrid model of learning, where the bulk of training content is delivered online in combination with short, instructor-led training (ILT) workshops. Integrating the best aspects of online learning with aspects of traditional face-to-face instruction provides a comprehensive learning experience.

Self-Paced Training (SPT) Online

Participants will begin their training journey in topic-specific courses in the online Canvas learning management system.

Each course focuses on delivering objectives and outcomes with multiple modes of engagement, designed to accommodate diverse learning styles. Participants will choose how they interact with course materials. For example, text if they prefer reading, videos if they prefer seeing demonstrations of processes being learned, and/or interactive exercises if they learn best by hands on practice.

With a majority of the course content offered through Canvas, participants are free to learn at their own pace, which allows for greater schedule flexibility. Courses will be open and available for college staff enrollment regardless of deployment group.

This offers participants several benefits:

- Gain a head start on training activities prior to college deployment
- Introduced to content and system processes prior to ILT workshops

- Participate in topic-related Q&A discussion boards
- Refresh and reinforce training content and concepts after course completion
- Stay connected to a cohort study group

Participants will progress through Canvas course requirements with familiar elements of a face-to-face course setting: syllabus, learning objectives, discussions, activities and assessments.

Instructor-Led Training (ILT) Workshops

After online prerequisite portions of a course are completed, short instructor-led training (ILT) workshops will be offered via WebEx. These workshops will present content best delivered in an instructor-led learning environment to a specific learner study group. ILT workshops will be delivered remotely by SBCTC trainers based in Olympia with remote assistance of College Facilitators at specific college campuses.

Activities, discussions and homework will be assigned between ILT workshops to reinforce knowledge transfer.

Because most of the material will already be delivered online, ILT workshops will:

- Provide greater detail and information regarding course topics.
- Reinforce the content and processes previously delivered through the online component
- Allow participants to glean additional details and information necessary for a deeper understanding of the system

ILT sessions will contain the same content as online course, but presented in a split format. For the duration of the course, participants will meet for three to four hours in class (remote) for a session, work online on their own until the next ILT session, work online after that session, etc.

This means participants will be engaged in coursework (either in class or online) for the duration of the course.

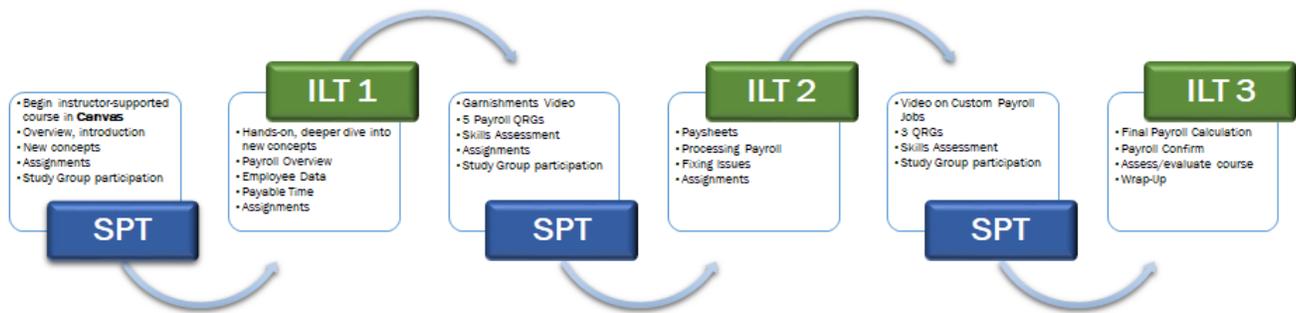
Workshops will be short in duration — a few hours per workshop session — offered on a continuous basis, with all of the offerings listed in a course catalog published and updated regularly. Frequency of workshop offerings will be based on topic demand, dictated by college need.

Learner Study Groups

In addition to the self-paced Canvas courses and ILT workshops, participants will be actively involved in discussions and activities through Learner Study Groups. Each Learner Study Group will allow for continued student engagement through collaboration and discussion of course topics, as well as completing various activities, assignments and assessments.

Figure 3: Training Approach Example

Figure 3 illustrates how student begins with Self-Paced Training (SPT) which is then reinforced with Instructor Led Training (ILT) and Study Group participation.



Assessments

To evaluate training effectiveness and determine whether participants possess the skill level needed to work within the PS environment successfully, participants will be assessed.

Assessments based on course outcomes and objectives will be created with the guidance of Project Functional Analysts. Two types of assessments evaluate a participant's level of knowledge transfer:

- **Objective-based:** question and answer, objective-based assessments require the learner to demonstrate understanding of learning objectives through multiple-choice, true-false and matching type test questions
- **Performance-based:** hands-on, performance-based assessments require the learners to demonstrate a series of tasks.

Assessments will be delivered through several types of activities including interactive exercises, question and answer quizzes, group discussions or navigating the system and sharing results.

During the self-paced training (SPT) component of the course, at the conclusion of each module, participants will demonstrate their comprehension of module content, by completing short question and answer quizzes in Canvas. Quizzes are not timed and students will have multiple attempts to earn a passing score of 80% or higher required for all module quizzes. Once a quiz is complete, participants may begin work in the next module.

During the ILT component of the course, participants will demonstrate comprehensive knowledge and skills by completing performance-based, hands-on activities. These activities may include interactive exercises or running a particular process by navigating through the system and sharing outcomes. A passing score of 80% or higher is required for all performance-based assessments.

A cumulative score of 80% or higher is required to pass the course. Participants who may benefit from remedial activities and information are encouraged to repeat challenging modules or attend additional ILT workshops to aid in knowledge transfer.

All assessment results will be monitored and maintained through the Canvas gradebook. Module

quizzes will be automatically graded using the built-in SpeedGrader tool, providing real-time scoring, feedback and progress tracking. SBCTC course trainers/facilitators will grade and score performance-based activities based on established rubrics.

Review and Update of Materials

The ctLink Training Team will review and update material based on updates from Oracle, updates to the system, and updates through collaboration with the Project and Support Functional Analysts.

Working with Learner Study Groups will allow the SBCTC Training Team to follow participants to determine which processes are working and which are not. Information and suggestions gathered by the study groups' efforts will also aid in material review and updates.

Long-Term Sustainability

With a majority of training content available online, the open course accessibility, as well as the quality assurance of training content performed by College Facilitators, significant long-term sustainability will be achieved.

Once training courses have been developed and released, they will be repeated through each deployment group and beyond. Content will be readily available through open access Canvas courses and recurrent ILT workshops. Training materials will continue to be updated with the latest PeopleSoft versions and delivered accordingly.

Appendix A

Training Lead

The college ctcLink Training Lead is responsible for coordination and logistics of training activities at the college. This role will:

- Act as liaison between the ctcLink SBCTC Training Team and the college campus
- Ensure that College Training Facilitators are scheduled for each session on campus and the appropriate personnel participate in all deployment group-training activities
- Plan and manage local logistics including, but not limited to, securing training labs, IT support, as well as produce and disseminate training materials
- Convey and distribute training information to college staff, making sure the campus stays up-to-date with training efforts led by both SBCTC and at the local level

This role is necessary early in the deployment schedule, through the duration of the implementation, and post Go-Live. This is a long-term position, as the need to coordinate with the ERP Support team regarding training will be ongoing to keep staff up-to-date with any system updates and future training opportunities.

Organizational Placement Recommendation

Recommended to be part of the campus eLearning team, which allows the Training Lead to work within the Canvas system to leverage its delivery capacity for teaching.

Skills Needed

- Subject matter expert in Finance, Student Services or Human Resources (experience in areas of the value chain that are relevant to their area of expertise) in the college business processes
- Outstanding communication skills, with the ability to communicate ERP security-related concepts to both a highly technical audience and to business-oriented leaders
- Strong working knowledge and understanding of previous system(s)
- Experience in facilitating training and/or strong customer service skills in subject area
- Strong communication, verbal, interpersonal or organizational skills
- Ability to commit to learning teaching and facilitating skills
- Willingness to learn complex technical and functional concepts

Training

Required Training

- ctcLink SBCTC training courses

Recommended Training

- Core Microsoft, Excel
- Analytical and research skills courses
- Customer service and training skills courses

Optional Training

- Oracle University training - <https://education.oracle.com/home>

Appendix B

ctcLink PeopleSoft Course List

Fundamentals - Global Configuration

- PeopleSoft Fundamentals
- PeopleSoft Pillar Fundamentals
- Cross-Pillar Global Design Adoption
- Campus Solutions Global Design Adoption
- Finance Global Design Adoption
- Financial Aid Global Design Adoption
- Human Capital Management Global Design Adoption
- Student Financials Global Design Adoption

Campus Solutions (CS)

- Academic Structure
- Curriculum Management: Course Catalog
- Curriculum Management: Class Scheduling
- Campus Community [Bio/Demo]
- Academic Advisement Tools
- Academic Advisement Rules
- Admissions
- Recruiting/Prospect Management
- Student Records: Beginning of Term Processes
- Student Records: Enrollment Processes
- Student Records: End of Term Processes
- Manage 3Cs
- Credential Evaluation
- Continuing Education
- Special Student Populations: International, Basic Education for Adults (BEaA), Dept of Corrections (DOC), Apprenticeship
- Special Student Populations: High School Programs
- Special Student Populations: Veterans
- Student Self-Service (Student Center, Student Services Center)
- Faculty Self-Service

- Advisor Self-Service

CS Financial Aid (FA)

- FA: ISIR Processing
- FA: Managing 3Cs and Processing FA Applications
- FA: Awarding Financial Aid and SAP
- FA: Authorizing and Disbursing Financial Aid
- FA: Processing Loans
- FA: Processing R2T4
- FA: Satisfactory Academic Progress for FA
- FA: Financial Aid Reporting (SNG, FISAP, URR)
- FA Reconciliation, Including Work-Study (FA-SF-GL)
- FA: Dual Processing Financial Aid Applications
- FA: Dual Processing Financial Aid Disburse and Reconcile

CS Student Financials (SF)

- SF: Accounts Receivables
- SF: Tuition Calculation
- SF: Payment Plans
- SF: Third-party Contracts
- SF: Collections
- SF: Refunds
- SF: Cashiering
- SF: Term Rollover
- SF: GL Interface

Human Capital Management (HCM)

- Absence Management
- Benefits
- Faculty Workload (FWL)
- HCM Core
- Payroll
- Talent Acquisition Manager (TAM)
- Time and Labor
- HCM: Manager Self-Service
- HCM: Employee Self-Service

Finance (FIN)

- GL200 General Ledger
- GL201 Year-End Close
- KK600 Commitment Control
- EX500 Travel & Expenses
- PU300 Purchasing
- PU301 Procure to Pay to GL
- Accounts Payable including 1099 Withholding
- GR400 Grants
- GR401 Grants and Non-Grant Billing to GL
- CN300 Contracts
- AR350 Accounts Receivable
- CM300 Cash Management and Treasury
- AM501 Asset Management
- BI300 Billing
- PC401 Project Costing



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Washington State Board for Community and Technical Colleges