



TIA Sample  
Needs Analysis Summary Report  
and Training Program Roadmap

Submitted by TIA, Inc.

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## Introduction

This document presents the results of the Training Needs Analysis conducted for the Company ABC Finance department by TIA/Technical Information Associates during the week of October 14-18, 2002.

This document is organized in three main sections: an Executive Summary, a Situational Analysis which highlights what we learned about your current environment, and a Training Program Roadmap which describes our recommendations for proceeding.

It has been a pleasure working with you and we look forward to continuing our relationship.

## Executive Summary

TIA/Technical Information Associates, Inc. has completed this Needs Analysis to determine the documentation and training needs for the Sample Company Finance organization, and to provide ongoing support for Sample Company's use of its JD Edwards OneWorld Xe system. Sample Company, a medical technology company, implemented OneWorld in early 2002. Sample Company has been public since 1996; prior to that the company was a private company focusing on medical research. Needs Analysis focused on the Financial departments in three locations:

- Los Angeles, CA – the corporate headquarters that employs several hundred people and approximately 17 JD Edwards financial users
- Boston, MA – the main instrument manufacturing, field service, and research and development site that employs 20-25 people and approximately 5 JD Edwards financial users
- London, United Kingdom – a purchasing and sales site that employs about 60 people and approximately 10 JD Edwards financial users

The Sample Company workforce is young and growing. The Finance Department implemented the JD Edwards system in early 2002, replacing a customized financial system. The implementation of the Financial modules, specifically, Accounts Payable (AP), Accounts Receivable (AR), General Ledger (GL), and Fixed Assets (FA) was completed quickly – within six months. Minimal training was provided as part of the implementation plan, and many users did not have the opportunity to attend the JD Edwards training. Since then, each financial office has evolved individual ways of doing business and interpreted how to use the JD Edwards functions.

The Sample Company Financial business leaders want their employees to understand all appropriate JD Edwards capabilities and system functions. This will enable users to have more confidence in the system and their use of the system, and will streamline the way they perform their tasks and the way they measure success. Also, the implementation of the OneWorld system as an integrated enterprise system requires employees to understand that data and information input into one business area impacts downstream business areas.

Sample Company's financial business leaders in Santa Clara hired TIA to conduct the Use Analysis, and are championing the development of customized documentation and training for the OneWorld system. The TIA team collected information from the financial staff and from surveys completed by the financial staff at three Sample Company locations.

We identified four roles within the financial area that people fill as they execute their current business processes and procedures. These roles and the corresponding JD Edwards system activities have been mapped to each other in the Role and Task Matrix provided as Appendix A.

Based on this analysis of the current procedures being used in the JD Edwards system, the user populations and work environments, and TIA's knowledge of the system functions and features, we have made a set of recommendations to meet Sample Company's training needs. TIA categorizes our recommendations into three stages.

We refer to the first stage as “low hanging fruit” – materials that can be developed and delivered within a short timeframe, and which will allow Sample Company users to realize an immediate return on investment.

The second group of recommendations includes documentation and training deliverables that address users’ needs to both enhance and extend their use of the JD Edwards system. This stage involves greater development effort and involves creating user documentation and training courses specific to Sample Company. The final group of recommendations involves helping Sample Company establish a long-term training solution that will meet the evolving needs of your rapidly growing organization.

TIA’s immediate, “low hanging fruit” recommendations are:

- **OneWorld Basics Training Course** – This hands-on instructor-led course focuses on OneWorld navigation (such as signing on and off of OneWorld, navigating the main menu and submenus, and navigating screen types and screen features), searching for information in OneWorld, adding attachments, accessing Help, viewing error messages, customizing grids, and importing and exporting information. Course attendees will work hands-on with the system using individual computers, and will have Student Workbooks that they can refer to after training is complete.
- **“Getting the Most Out of Reports” Training Course** – This course will consist of instructor-led training that focuses on an introduction to versions, data selection, data sequences, processing options, and running sample reports. Course attendees will work hands-on with the system using individual computers, and will have Student Workbooks that they can refer to after training is complete. We understand that standardized Sample Company reports are in the process of being developed; this course is designed to familiarize students with basic report-running procedures rather than the running of custom Sample Company reports developed in a the JD Edwards Report Writer.
- **Reports-At-A-Glance Reference Guide** – Rather than an actual training class, this deliverable is a document designed as a reference tool to introduce all users to the standard set of JD Edwards financial reports. It can be available in both print and online format, and includes the following information for each report: the report name and number, the timing associated with running the report (such as weekly or monthly), a descriptive paragraph summarizing the purpose of the report, a list of the data presented in the report, and a sample printout of each report.
- **Inquiries-At-A-Glance Reference Guide** – Rather than an actual training class, this deliverable is a document designed as a reference tool to introduce all management users to conduct inquiries into the JD Edwards financial modules. It can be available in both print and online format, and includes the following information for each inquiry: the inquiry name (or work instruction name), the menu and screen path, the step-by-step procedures to review screens and select data for inquiry, and exit procedures.

The following recommendations include both strategies and deliverables that we believe will both benefit and provide the necessary ongoing support to Sample Company financial teams.

#### **Develop user documentation first**

User documentation should be developed first, then leveraged as the basis for training. This user documentation will also serve as a long-term support tool for users.

User documentation should reflect Sample Company business guidelines and should be deployed in both online and hardcopy formats. This ensures users have clear, understandable reference materials, and will be able to understand how their work affects others in the entire business process. User documentation will be task-oriented so that

students gain confidence with their daily tasks; it will also include work instructions for tasks that students are not currently using but would find helpful. In addition, Quick Reference Cards should be used to serve as memory refreshers for infrequently used functions and to showcase integration of complex business processes.

### **Use a modular approach to training**

Training should use a modular approach so that each course addresses a discrete set of business processes and procedures. Training courses should be based on defined Sample Company business procedures. Due to their modular nature, courses can be customized for different user groups. That is, users will only need to attend module areas that affect their role and related tasks. Training course outlines should be built from the task analysis matrices and from the tables of contents developed during the creation of user documentation.

### **Use leverageable training materials**

TIA recommends creating training materials that meet both short and long-term training needs. To this end, we recommend building Instructor Guides and Student Workbooks for the training courses. The user documentation will serve as texts in the training programs.

Instructor Guides will provide support for the trainers as they teach users how to use the documentation, how to complete business procedures, and how to fulfill their job responsibilities. Instructor Guides can be created depending on a trainer's expertise, such as Training Lite for experienced trainers, or a Comprehensive Instructor's Guide for trainers who may be familiar with the JD Edwards system and Affymetreix business procedures, but who are not experienced trainers. A Comprehensive Instructor's Guide would be useful for super users who are placed in a training role, as it provides complete scripts, demonstrations, and exercises documented in easy-to-follow formats. Both recommendations contain presentation materials, demonstration instructions, and exercise answers, and use Sample Company-specific scenarios for exercises. Student Workbooks will contain exercises to be completed and note-taking space. These exercises will use realistic business scenarios based on Sample Company data and test cases.

Training materials should be developed in a manner that can be easily maintained and updated. As Sample Company moves forward and begins using other areas of OneWorld, initial training materials will be modified to reflect changing business practices.

### **Create a Separate Training Environment**

TIA recommends working with CIS to establish a separate training "sandbox". This allows end users to have access to training areas, specifically a training database and server for lab time and as follow-up to reinforce learning from the formal training courses.

## Next Steps

In the coming weeks, TIA proposes to work with Sample Company on the following activities:

- Bring on an experienced team to develop and implement the "low hanging fruit" deliverables
- Refine the Training Program Roadmap, especially regarding Stage II, to include making key training program design decisions, identifying the necessary OneWorld tasks for Sample Company user roles and developing User Guide drafts based on these tasks, and building draft course outlines for training.
- Begin laying the foundation for a long-term training solution to meet the needs of your growing organization.