



One state. One system.

Training Pilot Kickoff

SCO/STO Release Training



Agenda

- Training Pilot Objectives and Expectations
- Training Pilot Logistics and Schedule
- FI\$Cal Training Academy (FTA)
- UPK Overview
- Questions

Training Pilot Objectives

- Training Pilot sessions will be scheduled for 2-4 hours in duration and include:
 - A “mock delivery” of course content
 - Hands-on access to the User Productivity Kit (UPK) topic simulations
 - A debrief discussion to get feedback on the usability of training materials
- The goal of training is to test the usability of training materials in the context of a mock learning experience, this includes:
 - Validating the course objectives are met as designed through the provided or planned* content
 - Confirming the course duration, pacing, and order of topics
 - Validating the planned delivery method

Note: All topics may not be available at the time of Training Pilot.

Training Pilot Expectations

- Participant must complete required prerequisite training in the FTA prior to Training Pilot
- Participants will arrive on time and actively participate in the session
- Participants are encouraged to provide feedback throughout the session
- Participants will complete a course evaluation and participate in a session debrief at the conclusion of the “mock delivery”
- The FI\$Cal Training Team will summarize, analyze, and prioritize feedback and recommended changes to update training materials

Pilot Feedback

During Training Pilot, participants will be encouraged to focus on the following for their evaluation and feedback:

What to Focus On

- Ability to complete the training (i.e., click through the UPK topics)
- Order of topics (process flow, simple to complex)
- Course pacing and duration
- Whether stated learning objectives were met

What NOT to Focus On

- Writing style and formatting
- System and process design
- Department-specific business processes

Training Pilot Timeline

SCO / STO Release 2017	2016						2017								
	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Phase	Functional Test			User Acceptance Test							Deploy	Support			
Execute System Test												★			
Functional and Integration Test	Execution														
Execute User Acceptance Test				UAT Pass 1											
Scenario Development															
Training Material Build	Build Training Material														
Training Material Review			Review Training Material												
Pilot				Pilot w/SMEs											
Finalize Training Materials						Finalize									
System Training							TTT	End User Training							

Training Pilot Schedule

Course	Title	Date	Start Time	Expected Duration (Hours)
Kickoff	Training Pilot Kickoff	10/05/2016	10:00 AM	1
GL301	Reviewing Budget Exceptions/Managing Cash Validations	10/11/2016	1:00 PM	4
AP221	Warrant Processing	10/13/2016	1:00 PM	3
AR125	Bank Deposits	10/18/2016	1:00 PM	4
LA101	Introduction to Loan Accounting	10/20/2016	1:00 PM	4
LA102	Loan Processing	10/25/2016	1:00 PM	4
LA103	Managing Daily General Fund Cash Flow Loans	10/27/2016	1:00 PM	2
CM221	Bank Management and Reconciliation for STO	11/01/2016	1:00 PM	3
CM231	Managing Accounts Outside CTS and Report 14	11/03/2016	1:00 PM	2
CM232	Transfers for SCO	11/08/2016	1:00 PM	2
DM101	Introduction to Deal Management	11/10/2016	1:00 PM	3
GL303	SCO Transaction Requests and Month-End Closing	11/15/2016	1:00 PM	2

Training Pilot Sample Agenda

LA101: Introduction to Loan Management

Lesson Title	Duration (in mins)	Start Time	End Time	Topic Title	Format
Introduction	0:10	1:00 PM	1:10 PM	Welcome Ground Rules Learning Objectives Training Methodology Agenda	Lecture
Accessing the FISCal Training Academy	0:05	1:10 PM	1:15 PM	Starting Computers Logging into the FTA	Lecture
Lesson 1: Introduction to Loan Management	0:05	1:15 PM	1:20 PM	Course Introduction	PPT in UPK
	0:25	1:20 PM	1:45 PM	Loan Accounting Overview	PPT in UPK
Lesson 2: Establishing Loans and Configuring Participants	0:15	1:45 PM	2:00 PM	Establishing and Updating Loans	UPK in Try It!
	0:10	2:00 PM	2:10 PM	Establishing and Updating Loans	UPK in Know It?
	0:10	2:10 PM	2:20 PM	Configuring and Updating Participant Details	UPK in Try It!
Lesson 3: Managing Loans	0:10	2:20 PM	2:30 PM	Approving a Loan	UPK in Try It!
	0:15	2:30 PM	2:45 PM	Reviewing Repayment Schedule and Revising with a Scenario	UPK in Try It!
Classroom Break	0:15	2:45 PM	3:00 PM		
Lesson 4: Establishing External Loans and Using an Upload Spreadsheet	0:15	3:00 PM	3:15 PM	Establishing External Loans	PPT in UPK
	0:10	3:15 PM	3:25 PM	Establishing a Loan Using an Upload Spreadsheet	UPK in Try It!
Lesson 5: Interest Accrual	0:15	3:25 PM	3:40 PM	Running the Interest Accrual and Verifying Transactions	UPK in Try It!
	0:10	3:40 PM	3:50 PM	Running the Interest Accrual and Verifying Transactions	UPK in Know It?
Course Evaluation	0:10	3:50 PM	4:00 PM	Complete Course Evaluation in Survey Monkey	Survey Monkey
Debrief Discussion	0:30	4:00 PM	4:30 PM	Discuss Usability of Training Materials and Possible Improvements	Discussion
Optional Self Study with SME's in the room for questions and support	0:30	4:30 PM	5:00 PM	Continue to review Training Materials independently with SME support	UPK

Training Pilot Logistics

- Timing
 - Sessions will begin at 1:00 p.m.
 - First five minutes will be getting participants signed into computers
 - After each session, participants will have the opportunity to continue to go through the training independently
- Location
 - All Training Pilot sessions will be held in the Tanzanite room at the FI\$Cal Project site
 - Participants must check in with Security at the Main Entrance from Evergreen Street to sign-in and receive a Visitor's sticker

FI\$Cal Training Academy (FTA)

- Web-based Learning Management System (LMS)
- Delivers, manages and tracks training for end users
- The FS101 and FS102 courses in the FTA are the general FI\$Cal introductory and navigation courses
- Training Pilot participants:
 - Should have received their FTA User ID and Password via email
 - Need to complete prerequisite courses prior to Training Pilot, i.e. FS101, FS102, and any additional courses identified in the session invitation
- Training Pilot courses will be delivered outside of the FTA
- The FTA will be used for Train the Trainer and End User Training

UPK Overview

See It!

Watch a walkthrough of the procedure

Try It!

Complete the simulation by following directions

Know It?

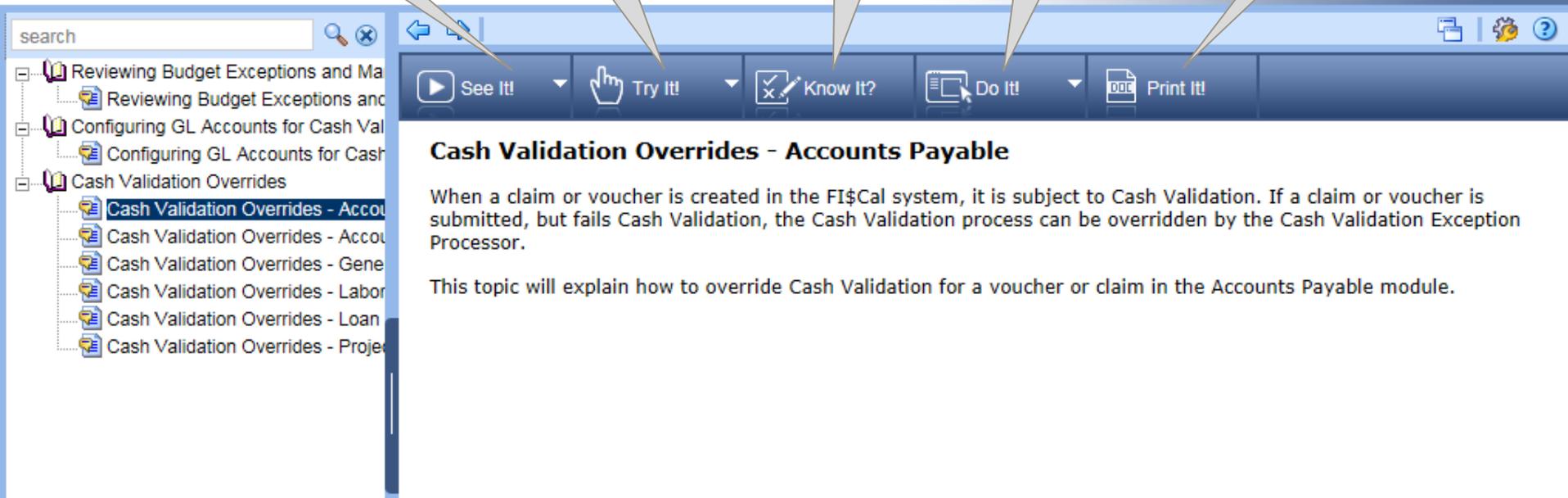
Complete the simulation without directions

Do It!

Complete the task in a production environment

Print It!

Print the steps in Job-Aid format

The screenshot shows the FI\$Cal system interface. On the left is a navigation tree with a search bar at the top. The tree includes categories like 'Reviewing Budget Exceptions and Ma...', 'Configuring GL Accounts for Cash Val...', and 'Cash Validation Overrides'. Under 'Cash Validation Overrides', 'Cash Validation Overrides - Accou...' is selected. At the top right of the interface is a toolbar with five buttons: 'See It!' (play icon), 'Try It!' (hand icon), 'Know It?' (checkbox icon), 'Do It!' (document icon), and 'Print It!' (document icon). Below the toolbar, the main content area displays the title 'Cash Validation Overrides - Accounts Payable' and a paragraph of text explaining the cash validation process and how to override it.

Cash Validation Overrides - Accounts Payable

When a claim or voucher is created in the FI\$Cal system, it is subject to Cash Validation. If a claim or voucher is submitted, but fails Cash Validation, the Cash Validation process can be overridden by the Cash Validation Exception Processor.

This topic will explain how to override Cash Validation for a voucher or claim in the Accounts Payable module.

Questions



FI\$Cal Information:

<http://www.fiscal.ca.gov/>

or e-mail the FI\$Cal CMO Team at:

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