Wichita State University

Banner User Services

Help Desk and Training Plan
UCATS User Services and other members of the WSU campus community participated in two SCT assessments, Help Desk and Training, which explored the university’s culture and perceptions concerning help desk and training practices.

This document outlines the proposed Banner User Services (BUS) Banner Help Desk and Training Plan for Wichita State University.

The intended audience for this document is the leadership of the WSU Banner implementation project and the UCATS Training and User Services group.

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“Banner User Services Training and Help Desk Plan”

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Revised February 28, 2005
Overview of SCT Recommendations

SCT “Help Desk Assessment”  
SCT’s “Help Desk Assessment” identified the points below that focus on training and support.

1. Track the calls via help desk management software.
2. Help Desk personnel should attend SCT application training.
3. Define the scope of Banner calls supported by the Help Desk.

Staffing recommendations and formulas were primarily based upon the number of help desk calls. At the current stage of the implementation, Banner Help Desk calls are low in number; formulas will be reviewed at a later date.

SCT “End User Training Readiness Assessment”  
SCT’s “End User Training Readiness Assessment” recommends the following:

1. Staffing recommendations include one primary position to plan, develop, coordinate and deliver training; an additional trainer or administrative support position to aid in the development and delivery of training.
2. Development of training materials is recommended. SCT offers a training material development workshop and recommends this course if functional areas will be charged with this effort.
3. Train the Trainer workshop is scheduled for April 18 and will focus on developing a solid delivery approach.
4. Purchase SCT’s Banner Fundamentals CBT; review various ways to deliver to large audiences.
5. Measure learning effectiveness through surveys or evaluations.
6. Incorporate pilot groups into training delivery and curriculum session plans.
Banner Help Desk and Training Plan

Introduction
The Banner Help Desk and Training Plan contains the recommendations of UCATS User Services based upon the findings of the SCT “Help Desk Assessment”, “End User Training Readiness Assessment”, interviews with other universities and professional experience.

Computer Help Desk
Students, faculty and staff will continue to receive desktop support by calling WSU-HELP, Option 1 or e-mailing helpdesk@wichita.edu. Calls will be tracked using the help desk management reporting system, Bridgetrack.

Banner User Services (BUS)
Banner Help Desk and Training support will be combined into Banner User Services (BUS). The Banner Help Desk may be reached by calling WSU-HELP, Option 2 or e-mailing Bannerhelp@wichita.edu. Banner Help Desk calls will also be tracked using Bridgetrack. Banner training will be tracked electronically; however specific software has not yet been identified.

Banner Help Desk summary
A flowchart identifying the levels of support and ticket processing is located in Appendix B, “Banner Help Desk Levels of Support and Ticket Processing”. The document summarizes the four levels of Banner support and how a help desk ticket moves through the support cycle. Help desk tickets are also known as work orders or calls and are used to describe a problem and track the resolution.

A crucial element for the success of Banner support is the use of Banner Functional Experts. Functional Experts are defined as individuals who are considered subject matter experts in their module or application.

Use of the Bridgetrack software system is an equally vital element of Banner help desk support. In order to track a call, a ticket must be created. This may be accomplished by the end user, Functional Experts, BUS or other members of UCATS. End users may view the status of their ticket at any time via Bridgetrack’s Web module. Functional Experts, BUS and UCATS will be able to create, update and close tickets. The success of this process is dependent upon tickets being created and updated timely.

BUS will be responsible for monitoring the health of Banner Help Desk tickets. A series of management reports will be created to report the type of calls received and processed. Tickets will be monitored to ensure they are addressed in a timely manner. Ticket resolutions will be used to build a knowledge base; a robust knowledge base is an excellent resource to resolve issues in a timely manner.

Banner help desk ticket numbers will increase and decrease throughout the year. When the various modules “go-live” and new releases are applied, the number of Banner help desk calls will spike. Password change requests are expected to be the highest call type.
Banner Help Desk and Training Plan, Continued

Banner training summary

There are four pieces of the training puzzle, pictured on Appendix C, “The Banner Training Puzzle” and will be discussed in more detail later in this document. As with the Banner Help Desk, the use of combined resources is a key factor to the success of Banner training and support.

BUS will work with various entities to develop training topics and materials and will be responsible for the scheduling and tracking of Internet Native Banner (INB) and Self Service Banner (SSB) sessions and attendees. Management reports will be created to summarize training activity. The University of North Florida (UNF) has determined it takes approximately six pre and post training support hours per one hour of delivery and six weeks to create a Banner training session, from conception to delivery. This formula will be used in the Recommendations section of this report.

The number of requests for training will fluctuate as the applications “go-live” and new releases are applied. Turnover training requests are often satisfied on demand; however, a concerted effort should be made to avoid one-on-one training.

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| Functional Experts | As defined previously, Functional Experts are considered to be subject matter experts in their module or application. There are two types of support that Functional Experts will provide, Banner Help Desk and Banner Training. Selecting the appropriate Functional Experts is critical, as noted on page 12 of the “End User Training Readiness Assessment”.

One of the duties of our Training and Help Desk Committee will be to develop a selection process for Functional Experts. Some individuals may be skilled in the preparation of training materials or provide technical support; others may be more suited to give one-on-one assistance rather than conduct classroom style training sessions. There may be more than one Functional Expert per module. Job descriptions should be reviewed and possibly revised to reflect changes to day-to-day duties and to recognize their efforts and expertise.

| Risks of using Functional Experts | Time, focus and writer inexperience are the primary risks involved with shared or borrowed resources, as noted on page 11 of SCT’s “End User Training Readiness Assessment”. While we recognize these risks, we also understand the necessity of using Functional Experts and appreciate their value to the continued success of this process.

Some areas may not have the personnel to provide Banner help desk and training support. One department may only have the personnel to provide level one Banner Help Desk support. Another area may not have the “right” person to deliver training but can provide the expertise to help create training materials. These areas will be reviewed on an individual basis.

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Banner Help Desk and Training Plan, Continued

Banner training puzzle

A visual depiction of training elements may be found in Appendix C, “The Banner Training Puzzle”. As we work through the training development process, the pieces of the training puzzle will come together to reflect the shared expertise and combined efforts of our WSU community.

Banner User Services (BUS) will work with Team Leads, Module Owners and Functional Experts to identify session curriculum and the intended audience. This will aid in the development of session materials, determine the delivery method and presenter.

1. BUS will work with Functional Experts to develop learning guides, procedural documentation and identify appropriate delivery methods. The mechanics of using Banner forms and WSU procedures will be incorporated into the training sessions and materials.

2. Functional Experts will provide Banner help desk and training to functional areas. For example, the Human Resources (HR) Functional Expert(s) will provide level one help desk support and training to other HR personnel. The mechanics of using Banner forms and WSU procedures will be incorporated into the training sessions and materials.

3. Cross Module Training is a term used to identify the training and support of one functional area’s module to another. For example, Admissions and Tuition and Fees typically require access to Financial Aid forms to provide student services. In this situation, the Financial Aid Functional Expert(s) will provide level one help desk support and training to the Admissions and Tuition and Fees departments. The mechanics of using Banner forms and WSU procedures will be incorporated into the training sessions and materials.

4. BUS will provide Banner training and help desk support to the larger WSU campus community. The mechanics of using Banner forms and WSU procedures will be incorporated into the training sessions and materials. A general rule of thumb: If the audience is outside a functional area, BUS will deliver the training. Some sessions may also require the assistance of the Functional Expert to field procedural questions.

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Interviews with other universities reveal different approaches to INB and SSB training and help desk support; common threads are listed below. See Appendix A, “University Training Information Reviewed” for school names.

1. Banner trainers concentrate on training specific forms and procedures while functional trainers focus on the numerous detailed application forms and procedures.

2. Banner trainers and help desk focus on Banner related items while the traditional Computer Help Desk provides hardware and other software support. Password change requests are sometimes shared between the two help desks and security officers.

3. Schools attempt to standardize documentation and training delivery; Banner trainers review materials and presentations prior to delivery.

4. Navigation training is delivered in different formats:
   a. Core INB users are considered primary data entry positions. A General Person or Non-person course that includes navigation and data standards are required for these users.
   b. Areas where INB access is primarily restricted to inquiry and reports incorporate navigation training into the material.

5. Some universities conduct post INB training assessments. They are often in the form of task performance reviews rather than written assessments.

6. Universities generally require attendance to an instructor led INB training session. Often these sessions are a blend of navigation and form usage but some schools focus on navigation techniques.

7. SSB training documentation is often located on a school’s Web site. These functions typically do not require instructor led sessions, however many schools do offer them for the individual’s who are more comfortable with that particular delivery method.

8. Access to SSB options by faculty and staff is routinely granted and instructional materials are located on the Web site. Instructor led SSB sessions are offered but attendance is not required. “The forms make sense” was one trainer’s description of the functions. Trainer time was spent developing internal computer based tutorials (CBTs) and materials rather than conducting sessions.

9. Student SSB options typically do not require instructor led training but step by step instructions are posted on their Web site.
Delivering training at the right time in the right format to the right audience are goals of any training department. There are typically two types of training delivery methods, instructor led and self paced.

Instructor led training sessions will be held in hands-on computer labs which are ideal for the detailed instruction and presentation of INB forms and reports. The audience will consist of those needing to learn step by step how to perform specific tasks in Banner and the correlating office procedures.

Self paced training may include CBTs, workbooks and instruction sheets. This delivery method will work well for individuals that are either computer savvy or the function is considered simple or self explanatory and do not contain difficult office procedures. The key to this method’s success is clearly written materials. Self paced sessions will primarily be used for SSB functions. However, if a faculty or staff member requests an instructor led session, efforts will be made to meet their request.

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Building training curriculum is a time consuming task. SCT training workbooks and the Banner Bookshelf provide the needed information to compile learning guides; WSU procedures and screen captures of Banner forms will be incorporated into the documents whenever practical. Identifying session topics and building session curriculum will take the efforts of WIN staff including BUS, Functional Experts, Team Leads and Module Owners. This process may be started one of two ways. A determination needs to be made if we:

1. Purchase SCT Needs Assessment, Phase 2 to build training curriculum will involve the following steps.
   a. Work with appropriate WIN staff to review and refine training spreadsheets submitted with the Phase 1 assessment.
   b. SCT has predetermined the workbook location of Banner forms most likely to be included in training sessions and can quickly build a session topic list based upon the spreadsheets submitted with the Phase 1 assessment.
   c. SCT has the expertise to estimate the length of time each session will take to present.
   d. SCT will not provide completed learning guides; WSU will write each guide and incorporate internal procedures.

2. Internally built training curriculum will involve the following steps.
   a. Work with appropriate WIN staff to review and refine training spreadsheets submitted with the Phase 1 assessment.
   b. Build session topic list by identifying and locating forms in Banner workbooks and Bookshelf.
   c. Estimate length of time each session will take to present.
   d. Write each guide and incorporate internal procedures.

Following discussions with David Alexander, Bill Prather, Steve Dickerson and Becky North, the decision was made not to purchase SCT Needs Assessment, Phase 2. Becky North will work with the areas to build training curriculum.
Learning guides

Training sessions and materials at WSU will blend the delivery of Internet Native Banner (INB) and Self Service Banner (SSB) navigation, forms, reports and office procedures. Learning guides will be available on the WSU intranet Web site. Navigation will become more intuitive starting with Release 7 and the training sessions and materials will reflect this change.

For example, a finance learning guide will combine the necessary steps to create a purchase order and include INB navigation techniques and WSU procedures. Banner query learning guides will provide step by step instructions to navigate the various INB query forms. Screen captures of Banner forms will be included whenever practical into INB learning guides.

SSB learning guides and instruction sheets will incorporate screen captures and detailed step by step instructions. Documentation will include PDF documents and Camtasia videos. Instructor led sessions for faculty and staff will be offered, however, attendance will not be required. BUS will monitor student questions to determine if additional documentation or presentations are needed.

Pilot workshops

SCT and University of North Florida recommend building pilot workshops into training session plans. As noted in the SCT “End User Training Readiness Assessment”, page 17:

“Those clients who have planned pilot classroom sessions into their end user training rollout have found it to be extremely beneficial. Materials can be refined and SME/trainers have an opportunity to practice before a small, live audience. This results in a “best practice” as a whole for a successful implementation.”

This is a practice WSU will incorporate into training delivery plans.

Pre and post assessments

Pre and post learner assessment options will be reviewed; options include written or performance based evaluations. Currently, post training written evaluations are completed by INB session attendees and are used to identify areas where training materials or delivery require clarification and gauge attendee’s understanding of the material.

Distribution of Banner logons and passwords

Currently, UserIDs and Passwords for the training database are distributed in the Banner Navigation session. A distribution process for production UserIDs and Passwords will be developed in conjunction with the WIN Security Officer and other key areas.

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<th>WIN help desk and training team</th>
<th>Team members will be called upon to form small Task Forces to focus on the development of the plans or processes outlined below. The development of the Functional Expert Selection Process is time critical.</th>
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| Help Desk Task Force | 1. Banner Help Desk Service Level Agreement.  
2. Standard Operating Procedures for the Banner Help Desk. This will include the initial scope of duties for the four Banner Help Desk levels of support shown in Appendix B, “Banner Help Desk Levels of Support & Ticket Processing.” |
| Completion timeline: On or before July 1, 2005 |
2. Banner Training Functional Experts selection process. |
| Completion timeline: Finance, Admissions and Registrar’s Functional Experts are scheduled to attend SCT’s Train the Trainer session the week of April 18, 2005. Selection process to be completed as soon as possible. |
| Promotional Task Force | 1. Develop broad promotional plan to introduce Banner Help Desk and Training to the WSU community, including Banner (INB and SSB), portal and Bridgetrack’s Web module functions to faculty and staff.  
2. New employee introduction of Banner Help Desk and Training promotional plan. |
| Completion timeline: On or before July 1, 2005 |
User Services Recommendations

Training Banner trainers and support personnel to properly process help desk calls and provide training and support is strongly suggested by SCT and other universities. Recommended training includes sessions presented by User Services, SCT and Center for Management Development (CMD).

1. Help desk management software, Bridgetrack, training will be developed and presented by Users Services. UCATS and Functional Experts that will provide help desk support are the target audience.

2. Customer Service, Training and Communication Skills seminars are offered by CMD. BUS and Functional Experts providing help desk and training support and written material development will benefit from these seminars. BUS will work with CMD to develop short and long term on-site, customized seminars.

3. SCT is scheduled to be on site the week of April 18, 2005 to conduct a “Train the Trainer” workshop. BUS and the initial Functional Experts from financials, admission and registrar’s office should attend this event. Enrollment is limited to 12 participants. Upon completion, attendees will be asked to complete a learning assessment of the workshop to help determine if an additional session is deemed helpful.

4. SCT offers an additional workshop, “Developing Custom Training Materials”. BUS and the initial Functional Experts will benefit from this workshop which will be scheduled for early summer, 2005. Enrollment is limited to 12 participants. Upon completion, attendees will be asked to complete a learning assessment of the workshop to help determine if an additional session is deemed helpful or if CMD workshops and in-house expertise will provide similar results.

5. Purchase of “Banner Fundamentals” was recommended by SCT for INB end users. This navigation computer based tutorial (CBT) was reviewed by Becky North, Susan Schomacker and Kevin Crabtree. The four hour CBT is informative but covered material that is considered to be helpful but not essential for the use of Banner. The purchase of this CBT is not recommended for Release 6. BUS will review the Release 7 navigation and other SCT CBTs as they are available and make purchase recommendations.

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SCT Phase 2 Needs Assessment

Deliverables of SCT’s “Phase 2 Needs Assessment” include a curriculum map for each purchased Banner module. Courses will have a suggested duration, delivery strategy, learning objective, audience (roles) and specific topics to be covered. Further discussions regarding cost, timing and expected deliverables are necessary prior to making a purchase recommendation.

February 21, 2005 update

As previously noted, the decision was made not to purchase SCT’s “Phase 2 Needs Assessment”.

Banner User Services staffing

Identifying appropriate staffing levels is a difficult task at this stage of the implementation. The BUS positions outlined below are recommended at this time. Periodic review of help desk and training management reports will help determine the appropriate level of staffing. Ultimately, the amount of help desk and training support provided by Banner User Services will determine the amount of staffing required.

1. WIN User Services and Training Support Coordinator will plan and manage the Banner help desk operations and training development, provide help desk support and deliver training. This position is currently held by Becky North. The revised “WIN User Support and Training Coordinator” position description is located in Appendix D.

2. WIN User Services and Training Support Specialist will develop and deliver Banner training and help desk support. The new “WIN User Support and Training Specialist” position description is located in Appendix E.

3. Additional administrative support will be required to provide supplemental support for Banner User Services. The amount and type of duties will fluctuate throughout the year; requests will be made as needed to existing UCATS administrative support personnel.

February 21, 2005 update

Dave Alexander approved the creation of the new position described in item 2 above. Position will be advertised by March 6, 2005 with an anticipated start date on or before April 18.

Estimated timeline

Key tasks and estimated dates are identified in “Banner Help Desk and Training Timeline” located in Appendix F.

Communication

BUS will enlist the help of the WIN communications area to introduce and promote the new Banner Help Desk and Banner Training to the WSU community as noted earlier in this report. Additional promotional plans will be developed in conjunction with the WIN Help Desk and Training Team. BUS will use the WSU intranet Web site to post training schedules and materials.
### University Training Information Reviewed

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Appendix B

Banner Help Desk Levels of Support & Ticket Processing

Level 0 Support
End User Self Help
(Web, FAQs, Bookshelf, list serves, etc.)

Level 1 Support
End User Services
Ticket Opened by
End User via Help Desk Software
Or
BUS (£76-HELP)
Ticket Routed to BUS and/or Functional Expert
Ticket Researched and Updated

Level 2 Support
Routed to
UCATS Specialist
Ticket Researched and Updated

Level 3 Support
UCATS Specialist
Ticket Researched and Updated
Call opened with SCT,
Microsoft, Oracle, etc.

Outside Specialists

Banner User Services
Help Desk and Training Plan
Appendix C

The Banner Training Puzzle

Presentation Delivery Options:
- Instructor Led
- Self Paced (CBTs, Workbooks, etc.)

Cross Module Training Example:
- Presenters: Financial Aid Functional Expert
- Audience: Admissions and Tuition and Fees

INB Specific Functional Forms & Reports
- Procedures
- Presentation

Audience: WSU Campus Community
- Presenters: Banner User Services
- INB & SSB Specific Forms & Reports
- Procedures
- Presentation

Audience: Functional Areas
- Presenters: Functional Experts
- INB Functional Forms & Reports
- Procedures
- Presentation

Audience: Functional
- Presenters: Functional Areas
Appendix D

WIN User Support and Training Coordinator Position Description

Wichita State University

Position Description

Division: Academic Affairs
College: Computing Center
Department: University Computing and Telecommunications Services
Position Title: WIN User Support and Training Coordinator
Position Code: N/A  Position Number: 3030

Part A: Position Requirements

Primary Function:
Provide the Wichita State University Information Network with the coordination of user application training and help desk support and to implement, maintain and improve the communication of application issues with users, the University Computing department, and external vendors.

Key Duties:

- Plans, develops, implements and conducts the delivery and procurement of instructor-led and online educational/training initiatives for university staff and faculty. Conducts needs analyses to provide university-wide training solutions. Interfaces with departments to develop educational solutions for customers and to ensure effectiveness of university-wide training efforts. Manages administrative ERP training processes including course development and scheduling, records, facilities and reports. Manages training personnel and directs activity; ensures training personnel are a good fit for the role. This responsibility area is 40% of total for this position.

- Create and maintain mission, services and quarterly objectives for the ERP Help Desk. This includes obtaining input from Wichita State University community and other technology based groups. Measure and report on ERP Help Desk performance to ensure all Service Level Agreements are met and objectives are achieved. Manage day-to-day functions of the ERP Help Desk, ensuring that priorities are followed and procedures are working; evaluate and improve on an on-going basis. Assigns ERP Help Desk personnel and directs activity; ensures ERP Help Desk personnel are a good fit for the role. This responsibility area is 40% of total for this position.

- Manage ERP help desk and training personnel, including day to day work assignments. This responsibility area is 10% of the total for this position.

- Supply content to the Wichita State University Information Network web site. This would include training schedules, syllabus of the training modules from the vendor, progress reports, FAQs for the users, and other valuable information. This responsibility area is 5% of total for this position.

- Supply needed support for the portal integration from all users, including students, employees, web visitors, and alumni. This responsibility area is 5% of total for this position.

Responsibility Level
The WIN User Support and Training Coordinator will have a moderate degree of discretion in all aspects of assigned duties and will be responsible in the implementation, maintenance, and improvement of the communication of WIN training, vendor efficiencies, application errors, unknown solutions to user issues, and follow-up processes of reported issues.
Appendix D, Continued

Special Assignments:
Attend technical support conferences, seminars, or training sessions as requested the Manager of Academic Computing.
Attend vendor training to evaluate and improve the effectiveness of the communication and instruction between the user and the trainer.
Attend all requested ERP meetings regarding training and software effectiveness.

Organizational Relationships:
This position is accountable to the Manager of Academic Computing for the performance of assigned responsibilities.

Performance Standards:
Performance in this position is considered good when:

- Vendor training is considered successful and coordinated within the timelines dictated from the main project schedule.
- Communication from initiation, follow-up, and completion between UCATS and the person reporting the problem is effective and efficient.
- Content of web contributions is clear and within the structure of the existing site.
- When no letters or memorandums expressing concerns or dissatisfaction of training processes or environment or the effectiveness of the communication of application errors and issues are received by University Computing and/or the managers to which this position is responsible.

Part B: Position Qualifications

Required Qualifications
- Bachelors’ degree with coursework in information technology, computer science, or an equivalent academic area. Equivalencies will be allowed and computed as: for every year of experience in an equivalent profession equals one year of college coursework.
- Two years experience in training and instruction to adult learners regarding information technology.
- Superior skills in communications in written, verbal, and technological mediums.
- Successful experience with diverse populations in a professional environment.
- Proficiencies in desktop computer applications.

Preferred Qualifications
- Experience with the implementation processes of an Enterprise Resource Planning or ERP.
- Experience in reading and interpreting instructions from a project management source.
- Experience in working in a team, project-directed environment.
Appendix E

WIN User Support and Training Specialist Position Description

Wichita State University
Position Description

Division: Academic Affairs
College: Computing Center
Department: University Computing and Telecommunications Services
Position Title: WIN User Support and Training Specialist
Position Code: N/A Position Number:

Part A: Position Requirements

Primary Function:
Provide the Wichita State University Information Network with training and help desk support for the administrative software system. This includes the development and delivery of training materials, telephone support and processing help desk calls.

Key Duties:
Training delivery:
- Reviewing course objectives and content prior to delivery
- Sending out or communicating preparatory material in advance
- Garnering adequate classroom participation
- Using effective platform skills
- Managing classroom dynamics to create an optimal learning environment
- Disseminating information in appropriate sequence
- Employing appropriate questioning techniques

Training assessment and evaluation:
- Conducting pre- and post-training assessments of skills and knowledge
- Evaluating trainee performance
- Evaluating course content and materials
- Evaluating trainer (self) performance
- Completing training needs assessments
- Providing feedback to track training issues and coordinate on-going training efforts

Training monitoring and coaching:
- Providing one-on-one coaching sessions to staff
- Setting goals for coaching and one-on-one training sessions

Help Desk Support:
- Provide accurate and creative solutions to user problems of moderate nature to ensure productivity
- Acquire and maintain current knowledge of relevant product offerings and support policies in order to provide technically accurate solutions to Wichita State University
- Participate in team projects that enhance the quality or efficiency of help desk service
- Assist in special product-related issues as needed
- Possess business and technical writing skills
Appendix E, Continued

Core Help Desk functions:
• Logs and tracks calls and maintains history records and related problem documentation
• Interviews users to collect appropriate information to resolve user problems
• Handles problem recognition, research, isolation, resolution and follow up steps for basic user inquiries
• Handles resolution of less complex problems immediately, while more complex problems are assigned to a higher level of support
• Recommends actions to resolve on-going help desk calls
• Involve use of help desk management database
• Prepares standard reports and Help Desk status reports

Responsibility Level
The WIN User Support and Training Specialist will have a moderate degree of discretion in all aspects of assigned duties and will be responsible in the maintenance and improvement of training and help desk support to the University.

Special Assignments
Attend technical support conferences, seminars or training sessions as requested by supervisor. Attend vendor training to evaluate and improve the effectiveness of the communication and instruction between the user and trainer. Attend all requested meetings regarding training and help desk.

Organizational Relationships
This position is accountable to WIN User Support and Training Coordinator for the performance of assigned responsibilities.

Performance Standards
Performance in this position is considered good when:
• ERP training is considered successful and coordinated within the timelines dictated from the main project schedule.
• Communication from initiation, follow-up and completion between UCATS and the person reporting the problem is effective and efficient.
• Content of Web contributions is clear and within the structure of the existing site.
• When no letters or memorandums expressing concerns or dissatisfaction of training processes or environment or the effectiveness of the communication of application errors and issues are received by University Computing and/or managers to which this position is responsible.

Part B: Position Qualifications

Required Qualifications
• Four year degree with coursework in business, information technology computer science or an equivalent academic area.
• Two years experience in training and instruction to adult learners regarding information technology.
• Superior written, verbal and listening skills.
• An aptitude for providing positive customer service and constructively handle unexpected problems.
• Proficiencies in desktop computer applications.
• Successful experience with diverse populations in a professional environment.

Preferred Qualifications
• Experience with the implementation processes of an Enterprise Resource Planning or ERP
• Experience in working in a team, project-directed environment.
## Appendix F  Banner Help Desk and Training Timeline

Updated February 21, 2005

<table>
<thead>
<tr>
<th>Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Resource Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Decisions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Needs Assessment, Phase 2</td>
<td>02/21/2005</td>
<td>Do not purchase Phase 2</td>
<td>Dave Alexander, User Services</td>
<td></td>
</tr>
<tr>
<td>Approve Banner User Services Help Desk and Training Plan</td>
<td></td>
<td>Plan reviewed, approved</td>
<td>Dave Alexander, User Services</td>
<td></td>
</tr>
<tr>
<td>BUS Position</td>
<td>39 days</td>
<td>2/14/2005</td>
<td>4/7/2005</td>
<td></td>
</tr>
<tr>
<td>Fill WIN User Support and Training Specialist position</td>
<td>39 days</td>
<td>2/14/2005</td>
<td>4/7/2005</td>
<td>User Services</td>
</tr>
<tr>
<td>Functional Experts</td>
<td>40 days?</td>
<td>2/14/2005</td>
<td>4/8/2005</td>
<td></td>
</tr>
<tr>
<td>Identify Functional Expert candidates</td>
<td>30 days?</td>
<td>2/14/2005</td>
<td>3/25/2005</td>
<td>BUS, Team Leads, Module Owners</td>
</tr>
<tr>
<td>Bridgetrack Help Desk Software</td>
<td>56 days?</td>
<td>2/14/2005</td>
<td>5/2/2005</td>
<td></td>
</tr>
<tr>
<td>Bridgetrack setup and testing</td>
<td>30 days?</td>
<td>2/14/2005</td>
<td>3/25/2005</td>
<td>User Services</td>
</tr>
<tr>
<td>Bridgetrack training: help desk staff</td>
<td>40 days?</td>
<td>2/14/2005</td>
<td>4/8/2005</td>
<td>User Services</td>
</tr>
<tr>
<td>Bridgetrack training</td>
<td>56 days?</td>
<td>2/14/2005</td>
<td>5/2/2005</td>
<td>UCATS, FE Finance</td>
</tr>
<tr>
<td>Bridgetrack Go-Live</td>
<td>56 days?</td>
<td>2/14/2005</td>
<td>5/2/2005</td>
<td>FE Finance, UCATS</td>
</tr>
<tr>
<td>CMD Sessions</td>
<td>111 days</td>
<td>5/12/2005</td>
<td>9/13/2005</td>
<td>(Reviewing options)</td>
</tr>
<tr>
<td>Training: Train the Trainer</td>
<td>1 day</td>
<td>10/13/2005</td>
<td>10/13/2005</td>
<td>BUS</td>
</tr>
<tr>
<td>Training Impact: How Do you Measure It?</td>
<td>1 day</td>
<td>5/12/2005</td>
<td>5/12/2005</td>
<td>BUS</td>
</tr>
<tr>
<td>Training: Making Training Stick</td>
<td>1 day</td>
<td>7/12/2005</td>
<td>7/12/2005</td>
<td>BUS</td>
</tr>
<tr>
<td>Training: How to Conduct a Useful Needs Assessment</td>
<td>1 day</td>
<td>9/13/2005</td>
<td>9/13/2005</td>
<td>BUS</td>
</tr>
<tr>
<td>Customer Service: Enhancing your Customer and Quality Service Skills</td>
<td>1 day</td>
<td>7/19/2005</td>
<td>7/19/2005</td>
<td>BUS, FE Finance, FE Registrar, FE Admission</td>
</tr>
<tr>
<td>SCT Application, Consulting</td>
<td>470 days?</td>
<td>2/14/2005</td>
<td>12/1/2006</td>
<td>BUS, Functional Experts</td>
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<tr>
<td>SCT ongoing application training and consulting</td>
<td>470 days?</td>
<td>2/14/2005</td>
<td>12/1/2006</td>
<td>BUS, Functional Experts</td>
</tr>
</tbody>
</table>

Continued on next page
### Appendix F, Continued

<table>
<thead>
<tr>
<th>Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Resource Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Train the Trainer workshop</td>
<td>5 days</td>
<td>4/18/2005</td>
<td>4/22/2005</td>
<td>BUS, FE Finance, FE Admission, FE Registrar</td>
</tr>
<tr>
<td>Developing Custom Training Materials workshop (June?)</td>
<td>3 days</td>
<td>TBD</td>
<td>TBD</td>
<td>BUS, FE Finance, FE Admission, FE Registrar</td>
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<tr>
<td>Train the Trainer workshop (Oct or Nov)</td>
<td>5 days</td>
<td>TBD</td>
<td>TBD</td>
<td>BUS, FE Human Resources, FE Advance, FE Financial Aid</td>
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<tr>
<td>Developing Custom Training Materials workshop (July or August)</td>
<td>3 days</td>
<td>TBD</td>
<td>TBD</td>
<td>BUS, FE Human Resources, FE Advance, FE Financial Aid</td>
</tr>
<tr>
<td>Banner Curriculum Development</td>
<td>415 days?</td>
<td>5/2/2005</td>
<td>12/1/2006</td>
<td>BUS, FE Finance</td>
</tr>
<tr>
<td>Finance curriculum dev &amp; pilot group testing</td>
<td>22.5 days?</td>
<td>5/2/2005</td>
<td>6/1/2005</td>
<td>BUS, FE Finance</td>
</tr>
<tr>
<td>SSB Finance curriculum dev &amp; pilot group testing</td>
<td>45 days?</td>
<td>5/2/2005</td>
<td>7/1/2005</td>
<td>BUS, FE Finance</td>
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<tr>
<td>LCMS curriculum dev &amp; pilot group testing</td>
<td>22.5 days?</td>
<td>5/2/2005</td>
<td>6/1/2005</td>
<td>BUS, FE Communications</td>
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<tr>
<td>Luminis curriculum dev and pilot group testing</td>
<td>45 days?</td>
<td>5/31/2005</td>
<td>8/1/2005</td>
<td>BUS, Functional Experts</td>
</tr>
<tr>
<td>Admission curriculum dev &amp; pilot group testing</td>
<td>45 days?</td>
<td>7/1/2005</td>
<td>9/1/2005</td>
<td>BUS, FE Admission</td>
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<tr>
<td>Registrar Schedule curriculum dev &amp; pilot group testing</td>
<td>45 days?</td>
<td>8/2/2005</td>
<td>10/3/2005</td>
<td>BUS, FE Registrar</td>
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<tr>
<td>Registrar curriculum dev &amp; pilot group testing</td>
<td>46 days?</td>
<td>1/30/2006</td>
<td>4/3/2006</td>
<td>BUS, FE Registrar</td>
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<tr>
<td>HR curriculum dev &amp; pilot group testing</td>
<td>45 days?</td>
<td>5/2/2006</td>
<td>7/3/2006</td>
<td>BUS, FE Human Resources</td>
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<tr>
<td>Advancement curriculum dev &amp; pilot group testing</td>
<td>45 days?</td>
<td>10/2/2006</td>
<td>12/1/2006</td>
<td>BUS, FE Advancement</td>
</tr>
</tbody>
</table>