PeopleSoft Project

End User Assistance Plan

California State Polytechnic University Pomona

REVISION CONTROL

Document Title: California State Polytechnic University Pomona, Student Administration End User Assistance Plan

Author: Carin Ruiz, Vickie Cleary

REVIEW HISTORY

Date	Reviewer	Response Due	Review Instructions
4/19/2003	Vickie		Please review draft and accept or reject changes
5/6/2003	Stephanie	5/12/2003	Please review for accuracy and any additional information you feel is necessary
5/6/2003	Carol	5/12/2003	Please review for accuracy and any additional information you feel is necessary
5/6/2003	Rose	5/12/2003	Please review for accuracy and any additional information you feel is necessary
5/6/2003	Walter	5/19/2003	Please review for accuracy and any additional information you feel is necessary
5/29/2003	Carol, Walter, Rose		Review document
6/06/2003	Vickie	06/09/03	Review of updates
6/11/2003	EUA Team	6/11/2003	Review of EUA Plan 1.3.6a

APPROVAL HISTORY

Date	Approver	Action	Signature (signifies Approval)
04/21/03	Vickie Cleary	Document review/update before 1st walkthrough	
5/20/2003	Rose	Used track changes to update document	
5/21/2003	Walter	Used tracked changes to update document	
6/9/2003	Vickie	Reviewed recent upgrades, changing where appropriate.	

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1. Mission and Scope

Mission

The success of any software implementation is ultimately measured by the value it provides to the users of the system. The mission of the EUA Team is to ensure that all Cal Poly Pomona end users of the CMS Student Administration system have the documentation and ongoing end user assistance they will need to use the Student Administration software effectively in their respective roles.

Scope

The scope of work to be provided by the End User Assistance Team (note the use of this terminology is based upon the mission statement) can be summarized by the following objectives:

1. Documentation, management, and distribution of all information that will be needed for developing assistance.
2. Coordination of assistance delivery to all end users.
3. Communication of end user learning opportunities and requirements to all end users.
4. Development, distribution, and maintenance of end user materials following implementation and initial assistance.
5. Ongoing end user functional support, through ongoing updates and web versions of end user materials, FAQ's, coordination with Help Desk.

While the functional documentation delivered by this team will also be useful for programmers and system administrators, technical documentation designed to serve the specific needs of programmers and system administrators is beyond the scope of the EUA responsibilities.

2. Overview of the Component-Based End User Assistance Team

The End User Assistance Team encompasses all of the following end user support services components: (1) Training, (2) Documentation and (3) Help Desk Support. The program will educate end users in ways that are meaningful to them using a variety of tools. The End User Assistance Team will develop a performance-based training plan to ensure that all training is specific to the job tasks performed.

End users will be assigned roles by **the appropriate Implementation Manager and Module Lead** – typically coinciding with their security roles – and each role will be assigned a "Learning Track" which is compromised of a series of recommended and optional components.

The EUA team will develop a list of Learning Track component types such as the examples listed below:

- Hands-on Classroom
- One-on-one Lab
- Open Lab
- Special Topic Workshops

- Self-directed Training
- Business Process Guide
- Quick Reference Guide
- Glossaries
- Help Desk

3. End User Assistance Team

3.1 Roles and Responsibilities

To ensure effective communication, a Role and Responsibility matrix has been developed. These roles and responsibilities are described in the following table. The EUA Team consists of the following people:

Table 1: Role and Responsibility Matrix

Role	*Primary Responsibilities*	*Deliverables*
SA Implementation Council Manager (per specific module(s))	1. Coordinate the identification of end users' needs. 2. Oversight, review, and approval of end user materials. 3. Communication and management of change in each respective areas. 4. Provide oversight.	▪ List of End Users and their role(s) and responsibilities ▪ Communications with end users.
Module/Foundation Leads	1. Draft training materials utilizing templates 2. Provide documentation of your business processes utilizing standard format 3. Timely review of business process guides and end user assistance materials. 4. Coordinate and develop a training team for your area. 5. Resolution of outstanding issues and communication of decisions to training team members. 6. Train End Users.	▪ Training Courses and associated documentation ▪ Business Process Guides
Subject Matter Expert	1. Assist, as needed with development of training materials and business process guides. 2. Timely review of business process guides and end user assistance materials. 3. Serve as a member of the training team for the respective areas. 4. Serve as resources and liaisons to end user constituencies, especially during the transition from legacy systems to new SA system.	▪ Guidance ▪ Expert review
EUA Coordinator	1. Coordinate PeopleSoft training and manages training credits for the Super Core Team. 2. Provide Functional Module Leads and Functional team members with standard end user assistance tools & templates. 3. Ensure that communication	▪ EUA Schedule ▪ EUA Project Plan ▪ Training Standards ▪ Training Deliverable Templates ▪ Weekly Status Reports

	standards are followed as stated later in this plan. 4. Provide campus user training registration system coordination 5. Participate in the help desk planning and facilitates coordination of help desk training. 6. Review documentation for consistency 7. Develop and maintain module communications (web site, email, newsletters, etc) 8. CMS status monthly reporting	
Cedar	1. Assist with the identification of business processes 2. Assist with the timely review of business process guides and end user assistance materials. 3. Assist ML and SME with the development of test scripts and scenarios. 4. Knowledge Transfer to Super Core Team members as needed.	▪ List of business process guides ▪ Test scripts ▪ Procedure Guides

3.2 EUA Resources

The EUA Team is scheduled to work on EUA activities Monday through Friday using time that is not otherwise utilized for IDP sessions. Due dates for the EUA deliverables are related to their respective go-live dates.

4. AUDIENCE ASSESSMENT* [1]

4.1 Identifying End User Roles and Information Needs

The End User Assistance Plan is based on the strategy of identifying end user roles and creating the assistance components that best meet the needs of each end user role. The three major training categories are: (1) Core Team, (2) Functional Team and (3) Campus Users. The Core Team is comprised of Functional Module Leads and Foundation Leads. As stated in the Charter, the core teams responsibilities is to facilitate coordination and communication among the functional module leads and foundation leads, inventory and evaluate need for reports and interfaces and participate in assessment activities. The second training category is the Functional Users, which includes those individuals who use the system extensively to perform the majority of their job responsibility. The third training category of Campus Users is compromised of individuals who use the system to perform some of their job responsibilities or learning activities and/or who extract information from the system relevant to their jobs and/or education.

4.1.1 Training for Core Team and SA Super Core Team

A comprehensive training program for the Core Team will be developed to ensure that all members have sufficient skills and knowledge to effectively engage in this system implementation effort. The Project Office will assess each team member to determine specific training requirements by subject and training level. PeopleSoft training will be for the project team and technical staff only. Cedar Consultants will also provide supplemental training for this group in the course of implementation

The Project Office has developed an Operational Training Plan for the Core Team members as a separate document based upon individual specific needs and the PeopleSoft curriculum and schedule. The Core Teams will be involved in testing and developing the new system. Through that testing and development, they will acquire very detailed knowledge of the system. Although testing and development are not formal methods for training or assistance, it is important to recognize that the Core Team members will acquire this knowledge through the process.

4.1.2 Training for Functional Team

Functional Users will use the system extensively to perform the majority of their job responsibilities. The Core Team members, who have received PeopleSoft training and have setup the system, will train the functional users in specific functionality that pertains to their area of specialization. In addition to training provided by specific core members, some of the functional team will also get exposure to the system through testing.

4.1.3 Training for Campus Users

Campus users will use the system and/or information from the system to carry out some of their job responsibilities or complete some of their educational activities. They will need training in only those processes and functions that pertain to that area of responsibility.

[1]Where “training” is referred to in this document, it insinuates On Campus Training

5. Developing and Distributing Documentation

5.1 Scope

As stated in Section 2, the mission of the End User Assistance Team is to ensure that all Cal Poly Pomona end users of the CMS Student Administration system have the documentation and the ongoing end user assistance needed to use the Student Administration software effectively in their respective roles.

The scope of documentation efforts required to achieve this mission can be defined by the following objectives:

1. Documentation, management, and distribution of information needed by the functional implementation teams.
2. Development, distribution, and maintenance of end user documentation.
3. Documentation, management, and distribution of all information needed for developing training.

5.2 End User Documentation Deliverables

Table 2 lists the forms of end user documentation currently planned for this project.

Table 2: Key End User Documentation Deliverables

Deliverable	Description/Purpose	Medium	Audience	Responsible
Business Process Guide	The Business Process Guides are a comprehensive set of documents that provide step-by-step instructions for all system processes performed using the SA system. The Business Process Guide is the essential reference from which all other End User Assistance components are derived.	▪ Electronic file w/web access ▪ Paper	Testing Group; Internal and external end users who need extensive information about a specific business process.	Module Leads with assistance from their Cedar Consultant
Setup Guide	Companion to the Business Process Guide that explains why the system and database tables were set up as they were.	▪ Electronic file w/web access ▪ Paper	Internal end users who may be responsible for changing the setup for a specific module or replicating it in the event of a software upgrade.	Cedar
Course Appendix to BPG	Course Appendices to the BPG and contain the information required for each course.	▪ Electronic file w/web access ▪ Paper	End Users in instructor-led classes.	Module Lead with assistance from their Cedar Consultant
Instructor Guide *Optional	Special versions of the Business Process Guides with guides and tips for instructors.	▪ Electronic file w/web access ▪ Paper	Instructors only	Module Leads with assistance from their Cedar Consultant
Quick Reference	Brief “cheat sheets” that summarize the essential steps	▪ Electronic file w/web	End Users	Module Lead

Deliverable	Description/Purpose	Medium	Audience	Responsible
Guide *Optional	of a business procedure.	access ▪ Paper		
Glossary of Terms	Definitions of key terms used to describe PeopleSoft functions or related Cal Poly Pomona business processes.	▪ Electronic file w/web access ▪ Paper	End Users	Module Lead
Frequently Asked Question List *Optional (highly recommended)	A compilation of questions (and answers) frequently asked by end users	▪ Electronic file w/web	End Users	Module Lead

5.3 Standards and Templates

To deliver quality materials to end users, all materials, regardless of module, must adhere to standard stylistic and format conventions. The EUA Coordinator will develop standards and templates for each of the deliverables listed in **Table 4**. The templates will take into account that the priority for distribution will be web-based.

Table 3: Timelines for Adopting Templates and Standards

*Note: The deliverable is templates and standards, not the items listed under deliverable

Template for Deliverable	Templates Due
Business Process Guide (BPG)	07/10/03
Quick Reference Guide (QRG)	07/10/03
Glossary	07/10/03
Course Appendix to BPG	07/10/03
Instructor Guide	07/10/03
Frequently Asked Question List	07/10/03
Setup Guide	Complete, delivered by Cedar

5.4 Distribution and Storage

Strategy

Through training and communication, the EUA Coordinator will emphasize that the most up-to-date and most easily accessible End User Assistance materials will be available via the Student Administration End User Assistance Link on the CPP PeopleSoft Website. Utilizing the CPP PeopleSoft website and resources, the web-based documentation library will meet the following functional requirements:

Functional Requirements for Web-based Documentation Storage and Distribution

1. Should not be able to change documentation unless authorized
2. Internal users have broad access to documentation via the share drive or website
3. Remotely accessible and available 24x7 (similar to PeopleSoft)

4. Printable output
5. Ability to retain all formatting, cross references and links
6. Response time is quick
7. Easy menu-driven access by role

Proposed Documentation Tools

Table 4: Documentation Tools

Tool	Use
Microsoft Word	Develop all documentation, using customized templates. Create HTML versions of end user materials for online viewing via CMS website.
Microsoft Visio	Any documents developed in Microsoft Visio will be converted to Microsoft Word.
Cal Poly Pomona PeopleSoft Website	The PeopleSoft Project Office is adopting an “End User Assistance” approach and is revamping the CMS Website to serve as the “hub” for End User Assistance. It is agreed that SA will serve as a prototype/model for an End User-centric web site. Documents will be available on the website in HTML format for optimal online viewing and in PDF format for optimal downloading and printing.
Adobe Distiller	End User Assistance team to convert Word documents into PDF format for web-based distribution will use adobe Distiller. PDF is the standard file form for documents on Cal Poly Pomona websites and is strongly supported by ITS.

5.5 Development Process for Documentation

The standard process for creating the first draft of any End User Documentation is shown below.

1. Identify owner as identified in Section 5.2 End User Documentation Deliverables.
2. Assign and communicate responsibility for developing, reviewing, approving, producing, and maintaining deliverable
3. Define the audiences for the deliverable (main and ancillary)
4. Understand the purpose and objective(s) for the deliverable
5. Understand when the document is due (date)
6. Determine medium for delivery within project guidelines
7. Determine anticipated life of the deliverable
8. Schedule review/approval process
9. Determine if an appropriate standard template exists for document,
   - If so, proceed in development using the standard template
   - If not, create a format to best meet the requirements for the document, have it reviewed and added to the list of standard templates.
10. Create outline of topics, including the following minimum requirements:
    - Purpose
    - Scope
    - Body
11. Populate the outline with required information, creating first draft of document

5.6 Quality Review and Approval Process for Documentation

Purpose

The process described below is a method for performing quality reviews on SA documentation so that the appropriate team members may approve high quality documentation then published to the intended audience in a timely manner.

Objectives

This Quality Review and Approval Process should provide the following:

1. An easy to follow step-by-step process for performing the quality review
2. A thorough understanding of what is expected of those team members who participate in the Documentation Quality Review and Approval process

Table 5: Review and Approval Process

#	Action	Responsibility
1	Determine who should review the document and what each reviewer should review for. Reviewers must include: 1. SME's and module leads for clarity and accuracy of process and policy. 2. Implementation Managers for clarity and policy accuracy. 3. EUA for, grammar, style consistency, format, and standards.	Author
2	Determine deadlines and logical sequence for reviewers' responses (see sequence above).	Author
3	Route the paper document to all reviewers with review instructions including: - What the reviewer should focus on - When the response is due	Author
4	Carefully review document following guidelines. Return to author by deadline.	Reviewers
5	Discuss revisions. If necessary, convene relevant reviewers to resolve conflicting opinions.	Author and Reviewers
6	Communicate to the reviewers, expressing appreciation for effort and clarifying review comments, where appropriate.	EUA Coordinator
7	Make revisions and update Document Revision History	Author
8	Repeat steps 4-8 as appropriate.	Author & reviewer(s), EUA Team
9	Route document to EUA Coordinator	EUA Coordinator

6. Developing and Delivering Training

6.1 Scope

In keeping with the mission of the End User Assistance, to ensure that all Cal Poly Pomona end users of the CMS Student Administration system have the documentation and training they will need to use the Student Administration software effectively in their respective roles, the scope of training efforts can be defined by the following objectives:

1. Communicate with end user organizational units and role-based constituencies to determine their training needs
2. Apply hands-on classroom, one-on-one lab, or self-directed training methods as appropriate to meet specific learning needs.
3. Apply a just-in-time schedule for training

6.2 Deliverables

The information gathering sessions revealed strong consensus on the following principles with regard to delivery of end user assistance:

1. Training will be designed in modular units based on major business processes, so that course content will be relevant and targeted at small, highly focused groups of end users.
2. Initial training efforts will focus on hands-on, instructor-led classes.
3. Business Process Guides, Quick Reference Guides, Glossaries, Open Labs, Special Topic Workshops, and Help Desk will supplement hands-on, instructor-led training.

Defining Course Delivery Media

Objectives

End User courses should be developed and delivered via media that meet the following objectives for the end user and the campus:

1. Designed for ease of use to end user
2. Adaptable to the needs of various internal and external roles
3. Easy to maintain in a post-implementation environment
4. Proven technology
5. Able to deploy by required Go Live date with existing resources

Strategy

Strategy will be based on what the Module Lead along with the EUA Team feels is appropriate for a specific audience taking into consideration cost and resource.

Functional Requirements for Instructor-led Courses

1. Understandable
2. Paced appropriately
3. Physically comfortable
4. Audible (not too loud, not too soft)
5. Relevant for audience
6. Fun
7. Interesting

6.3 Course Registration

Objectives for Core Users

1. Module Leads will identify course requirements, required attendee list, and course dates
2. EUA Coordinator will schedule PeopleSoft courses, instructors, and facilities
3. EUA Coordinator will set and enforce course prerequisites and eligibility
4. EUA Coordinator will register learners and maintain enrollment and completion records

Objectives for Campus Users

1. Module Leads will identify course requirements, required attendee list, and course dates
2. EUA Coordinator will schedule all courses, instructors, and facilities
3. EUA Coordinator will register staff in course based on their security role
4. EUA Coordinator will maintain enrollment and completion records

Strategy

Although there are two different types of users the strategy is similar, to provide a service to end-users that is informative and simple.

6.4 Technical Environment

Objectives for Technical Environment

1. EUA Coordinator will provide the hardware, software, and network environment to enable trainers to set up hands on courses and walk through procedures for testing and validation of training scenarios.
2. EUA Coordinator will enable participants in hands-on courses to access relevant functions and training data, including the ability to run reports, queries, and all processes that the end-users will need to utilize.
3. EUA Coordinator will set standards as to how the module leads will give information to the DBA's as to what type of setup will be needed for their training session.

6.5 Training Facilities

Preferred training room(s) has been identified for the use of training.

The configurations for the rooms are:

Room	Contact	Notes
C5-15	Gee-gee	Runs on XP, cannot support 2-tiered
P-27		
Student Labs		

In the event that the above rooms are unavailable, other rooms have been identified and will need at least two weeks advance reservation of the rooms.[2]

Room	Capacity
13B	24
13C	24

[2]***Ongoing implementation activities will have priority over the trailers.**

7. COMMUNICATION PLAN

End User Assistance communication will be managed using the information matrices below. The matrices will contain detailed information for every item requiring communication to the project audience. One matrix will address communication intended for general project audiences that will be updated an maintained by the EUA, and the other matrices will address communication intended for module-specific audiences that will be updated and maintained by SME and/or the SA Council Representative. The matrices will be reviewed and updated on a regular basis throughout the life of the project.

7.1 General Audience Communication

What		Who	How	When		Responsible
Topic	Description	Audience	Delivery	Due Date	Frequency	
Introduction of EUA Plan	Distribution of the EUA Plan with introduction email attached	Chairs, Project Team Members	Email		One Time	Carin Ruiz
Introduction of EUA Plan	Presentation of EUA Plan, including question & answer session	Implementation Council	Vocal		One Time	Carin Ruiz
EUA Status Report	Explanation of task accomplishments & issue and upcoming deliverables	Project Team	Electronic file on drive	Ongoing, Mondays	Weekly	Carin Ruiz
Project Plan Updates	EUA specific task updates to the project plan	Project Team	Electronic File	Ongoing, Wednesdays	Weekly	Carin Ruiz

7.2 Admissions Communication

What		Who	How	When		Responsible
Topic	Description	Audience	Delivery	Due Date	Frequency	
Invitation	Inviting Staff to Training	Staff	Electronic	Week before training	As training occurs	Pachune
Training Reminder	Reminder about training	Staff	Electronic	Day before training occurs	As training occurs	Pachune

7.3 Student Records Communication

What		Who	How	When		Responsible
Topic	Description	Audience	Delivery	Due Date	Frequency	
Weekly Commu	Weekly Heads Up Note	Records Staff	Electronic	Fridays	Weekly	Nancy and Tim

nications						
Invitation	Inviting Staff to Training	Staff	Electronic	Week before training	As training occurs	Carin and Nancy
Training Reminder	Reminder about training	Staff	Electronic	Day before training occurs	As training occurs	

7.4 Academic Advising Communication

What		Who	How	When		Responsible
Topic	Description	Audience	Delivery	Due Date	Frequency	
Staff Communications	Announcements regarding training dates, BPG's and other related EUA activities	Records Staff	Announcement	Monthly Meeting	Monthly	Jennifer and Jason
Invitation	Inviting Staff to Training	Staff	Electronic	Week before training	As training occurs	Jennifer and Jason
Training Reminder	Reminder about training	Staff	Electronic	Day before training occurs	As training occurs	Jennifer and Jason

7.5 Student Financials Communication

What		Who	How	When		Responsible
Topic	Description	Audience	Delivery	Due Date	Frequency	
Status Meeting	Announce due dates of training	SF Staff	Announcements		Weekly	Sheryl and Reed
Calendar	Detailed training calendar	SF Staff	Web	3 weeks prior to training		Sheryl
Signup Sheet	Sheet to signup for training	SF Staff	Paper	2 weeks prior to training		Sheryl

7.6 Financial Aid Communication

What		Who	How	When		Responsible
Topic	Description	Audience	Delivery	Due Date	Frequency	
Training Schedule	Spreadsheet of scheduled training classes	Financial Aid Managers	E-Mail	9/18/03	Once	Bob Hughes
Training Topics	Binder containing dividers for each topic	All FA Staff	Physical Media	10/13/03	Once	Virginia Gutierrez
Training Reminders	Voice Mail Reminder during training week	All FA Staff	Voice Mail	Tuesday of training week	Bi-weekly (or when training is scheduled)	Bob Hughes
Status Update	Updates to topics, training schedule	All FA Staff	Staff Meeting Announcements		Alternate Thursdays	Bob Hughes
Revised Training Schedule	Updated training schedule	All FA Staff	E-Mail	1/6/04	Once	Bob Hughes

8. End User Assistance Evaluation Process

To evaluate the effectiveness of the training program, an evaluation process will be established and followed.

8.1 Learner Evaluation

To determine the effectiveness and efficiency of a course and the associated documentation, audience evaluations will occur for all “External” course deliveries. An assistance-evaluation form will be distributed at the end of each course session to survey the learners’ opinions about:

1. Course Content
2. Pace
3. Instructor’s knowledge
4. Assistance Materials
5. Training Facility
6. General comments about the sessions

These evaluations will be reviewed and tracked after each session and are used to improve the instructor-led delivery. Where applicable, course materials & delivery may be revised to the learners’ needs.

9. Post-Implementation End User Assistance

9.1 Managing Change to End User Assistance Deliverables

Purpose

The process described below is a method for maintaining SA documentation[3] so that the level of quality and utility for end users consistently meets expectations. The EUA Coordinator will monitor and control the process. It is the responsibility of the Module Lead to update and maintain their area of responsibility to accurately reflect the business.

Objectives

This documentation maintenance process should provide the following:

1. A general understanding of how documents will be updated
2. A general understanding of how documents will be retired
3. A general understanding of how changes to documentation will be communicated
4. A general understanding of how training courses will be updated
5. A general understanding of how training courses will be retired
6. A general understanding of how changes to training courses will be communicated

Process Name	General Process
Document Updates	Updates to documents shall be made on an as-needed basis by the author named in the Revision Control sheet. Each time a document is updated, information about the actions taken will be entered into the appropriate fields in the Revision Control section of the document.
Retiring Documents	1. When documents are no longer useful to the prescribed audience, they should be retired. When a document is retired, the date and reason for the action should be entered into the Revision Control section of the document. 2. Electronic copies of retired documents should be placed in the archive folder and stored there for at least three years before destroying them. 3. If a retired document was stored on a web site, the web site should be updated to communicate the action to viewers.
Communicating Documentation Change	It is important to communicate any document change to the audience so that expectations are appropriately managed and met. Accordingly, the author should provide timely communication to her/his audience when change occurs. The communication should be delivered within 24 hours (before or after) of the change. Email is the preferred medium for communication.
Training Course Updates	Periodic changes to the system or business processes may impose change to existing course content and/or delivery methodologies. When these changes occur, the Trainer
Retiring Courses	Business processes and system changes may render a specific training course useless. When this occurs, the course will be retired. When a course is retired, the training registration database should be updated so that references to the course (in the learning track, the schedule, etc.) are removed.
Communicating Course Change	It is important to communicate change course changes to the audience so that expectations are appropriately managed and met. Accordingly, the author should provide timely communication to her/his audience when change occurs. The communication should be delivered within 24 hours

[3] Documentation refers to anything that will be used for future training

	(before or after) of the change. Email is the preferred media for communication.

9.2 Archive & Retrieval Process for End User Assistance Deliverables

UNDER CONSTRUCTION –

9.3 Coordinating End User Assistance and Help Desk

The Help Desk will assist with basic information and distribute response to functional and business process questions. This is the same structure that was used for the implementation of the Finance and Human Resource Systems and the CMS Help Desk structure. The Help Desk will be the point of contact to resolve end users problems related to system access and basic navigation. If the users have questions regarding the application functionality and/or the business process, the Help Desk will refer them to the SME or the SA Implementation Council Representative for further assistance. If the SME cannot assist the end user, it will then involve the CMS support resources.

Objectives

1. Train the Help Desk staff in customer service, hardware and desktop applications
2. Accept, document, and track service calls
3. Route trouble tickets to the appropriate subject matter expert for resolution
4. Validate satisfactory resolutions of each trouble ticket
5. With the support of the campus community, analyze utilization patterns as a basis for continued improvement of business process, system enhancements, training and documentation

Help Desk Needs

The Help Desk will have two different types of users, Functional Users and the Campus Users.

Help Desk for Functional Users

Type of End Users	Sources of Help		
	Campus Help Desk	FML	Website
Technical	▪ Security ▪ Logon ▪ Navigation		▪ System Status ▪ Navigation ▪ Availability of Help Desk
Software	▪ Diagnosis of software problems ▪ Software status	▪ Detail on what we need to do ▪ Effects on daily processes	▪ Update/refresh information
Process	▪ Referral of process issue ▪ Identify Training Needs & FAQs	▪ Specific Detail Questions	▪ Online guides/steps ▪ Where to go… "If this happens."

Help Desk for Campus Users

Type of End Users	Sources of Help		
	Campus Help Desk	FML	Website
Technical	▪ Printing Issues ▪ Min Hardware Requests ▪ Security ▪ Network Issues		
Software	▪ Navigation ▪ System Error Message	▪ (F) Applying Holds ▪ (S) Registration Assistance	▪ Navigation ▪ (S) Registration Assistance
Process	▪ How to Logon		▪ How to Logon

Help Desk Resources

The following resources exist to support Help Desk processes for the SA Implementation at Cal Poly Pomona.

1. A centralized help desk function in I&IT Support.
2. Software (Helpline) to log and track help desk calls, which is accessible to those entering and beginning assigned trouble tickets.
3. Technicians and Subject Matter Experts (SMEs) within the various departments and colleges.
4. I&IT technical staff to address campus-wide technical and software issues associated with SA.
5. A process for the Project Management Team to review recurring help desk calls during the implementation to ensure that recurring issues are escalated as necessary.

APPENDICES

APPENDIX 1.0 Quality Assurance & Control

Document Plan for SA End User Assistance *(title of document goes here)*

Document Purpose

Document Audience

Internal Audience	External Audience

Document Objectives

Document Media

- ❑ Paper
- ❑ MS Word file on server
- ❑ Pdf file on Web
- ❑ Other:

Document Reviewers

Reviewer	Reviewer Role	Review For:
	(Subject Matter Expert)	(Clarity, accuracy, test documentation)
	(Subject Matter Expert)	(Clarity, accuracy, test documentation)
	(Subject Matter Expert)	(Clarity, accuracy, test documentation)
	(Module Lead)	(Clarity, accuracy, test documentation)
	(Implementation Chair)	(Clarity, accuracy, test documentation)
	(EUA Coordinator)	(Editorial review)

Approval Process

Approver	Approver Role
	(Module Lead)
	(Implementation Chair)
	(EUA Coordinator Lead)

Quality Review Checklist

Content Reviewers' Checklist:

- ☐ Content accurately reflects business processes, policies, and other topics
- ☐ Process was tested and achieved positive results
- ☐ Document flows well and is easy to read and comprehend
- ☐ Document achieves purpose and objectives

Editorial Reviewers' Checklist (EUA Coordinator)

- ☐ Document flows well and is easy to read and comprehend
- ☐ Grammar check complete
- ☐ Font check complete
- ☐ Acronym check complete
- ☐ Numbering check complete
- ☐ Project Logo correct
- ☐ Headers and footers correct
- ☐ Document printed correctly on paper
- ☐ Document appeared correctly when viewed in pdf format

Additional Comments:

Documentation Review & Approval Form

Document Title:

Author:

REVIEW HISTORY

Date	Reviewer	Response Due	Review Instructions

APPROVAL HISTORY

Date	Approver	Action or Signature (signifies Approval)

Appendix 2.0 Electronic Format Analysis

Electronic Document Format: PDF vs. HTML

*STILL UNDER REVIEW BY EUA TEAM

Business Need
End user documentation, such as Business Process Guides and Quick Reference Guides, must be easy to update, easy for end users to access, and easy to use. It has been determined that an SA End User Assistance section of the CAL POLY POMONA CMS website will be the best available tool for storing, organizing, and distributing these documents electronically. At issue is which electronic format(s) will best meet these business needs: (1) HTML (Hypertext Markup Language), (2) PDF (Portable Document Format), or (3) a combination of both.

Assumptions
1. Original documentation will be created in Microsoft Word and then converted into one or both of these electronic formats.
2. The great majority of end users already have an appropriate version of Adobe Acrobat Reader installed on their computers. This is necessary for accessing PDF documents.

Decision Factors
In deciding among the three options presented, the following factors must be considered:

Conversion: What is the effort involved in converting from MS Word and how clean is the conversion? What additional manual steps are involved? Are critical formats, numbering, links, and cross-references retained?

Maintenance: How complex is it to post and update documents? Who can post and update, and what are the dependencies? Are there access or security issues?

Online use: What is the user's experience with each of these formats when using the documents online?

Use in print: What is the user's experience with each of these formats when printing the documents and using hard copy?

Option 1 – HTML Format
Conversion
Authors must follow specific format procedures for page breaks, bookmarks, etc. in MS Word in order for their documents to be viewed correctly in HTML. Once the author has finished creating or modifying the document using Word, he/she would simply choose the "Save As Web Page" option. Word creates the HTML format (web page) along with a separate folder, which contains any images that were included in the document

All hyperlinks and bookmarks are retained. However, headers, footers, and pagination of original document are lost, so Table of Contents and cross-references to page numbers are invalid. A more sophisticated web-authoring tool, such as Adobe's FrameMaker Professional would be needed to produce more user-friendly HTML documents.

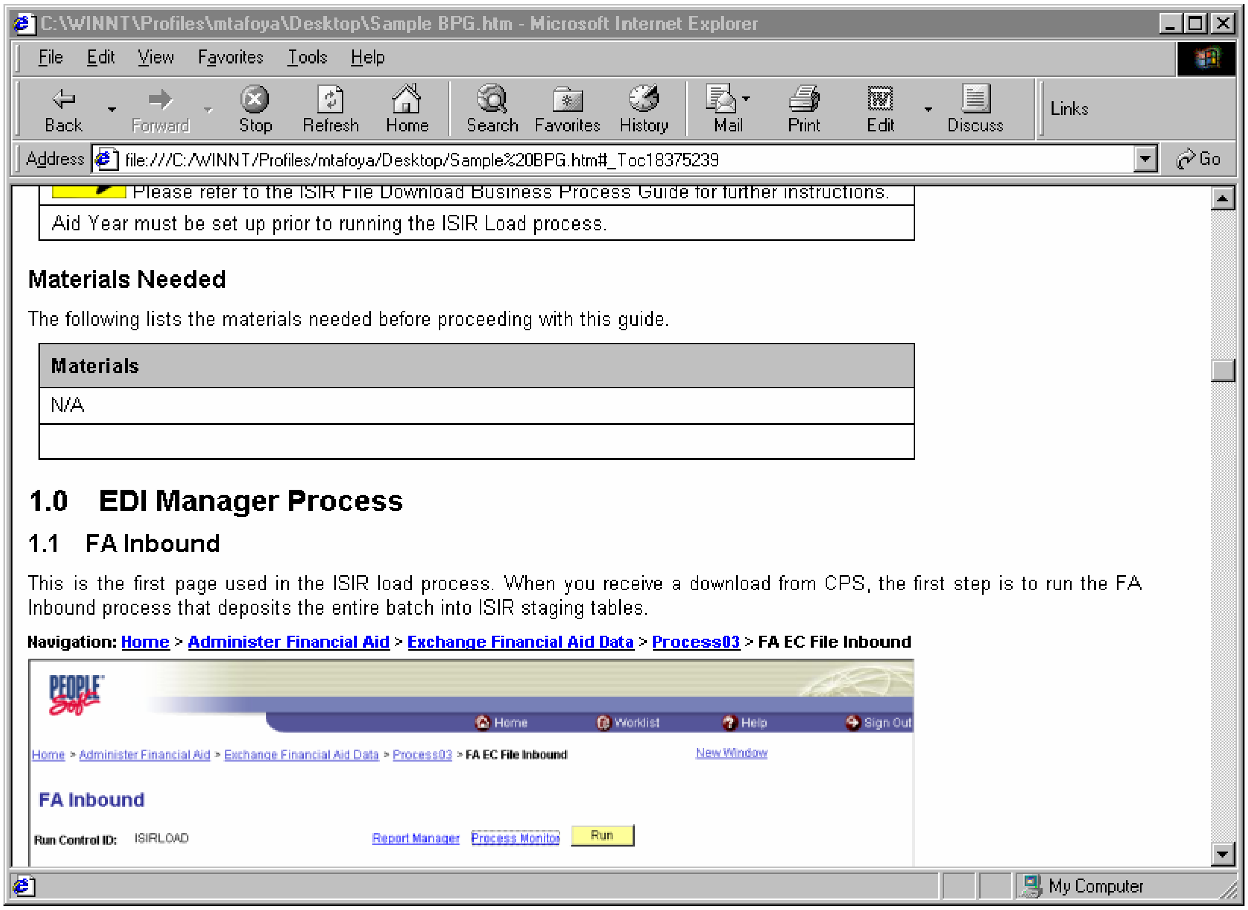
Maintenance
Both the HTML file and the graphics folder must be saved or updated and provided to the Webmaster, who will post the document online. A more sophisticated web-authoring tool, such as Adobe's FrameMaker Professional would be needed to maintain more user-friendly HTML documents.

Online Use

Once the document has been posted online, end-users can access it by clicking a hyperlink and view it as a web page. Either Internet Explorer or Netscape Navigator can be used to view these web pages. The end user needs no additional software to view them. Quality of screen shots (the primary form of graphics in our end user documentation) is not diminished. They are as sharp as in the MS Word original.

However, it is difficult to navigate in a large HTML document that has been converted from MS Word. Without other web authoring tools, Table of Contents would have to be created and updated manually. Also, there would not be a “document map” or other navigation aid available to assist the user.

The following image illustrates how a section of a Business Process Guide will look to end-users when viewed through a browser:



Use in Print

The HTML document prints clearly, but as with the online version, page numbers, cross-references, and TOC would be invalid.

The following pages provide a printed sample of a Business Process Guide in HTML format.

Option 2 – PDF Format

Portable Document Format (PDF) is the format used to view documents in Adobe Acrobat. Although PDF is a commonly used format on the Internet, with a number of user-friendly features, it is proprietary to Adobe.

Conversion

Authors must follow specific format procedures for page breaks, bookmarks, etc. in MS Word in order for their documents to be viewed correctly in PDF format. In order to save the MS Word document as a PDF file and retain all hyperlinks, bookmarks, and cross-references, the author must have Adobe Acrobat PDF Maker version 5.0. CAL POLY POMONA has licenses to this software for all members of the SA End User Assistance team. With this software installed, Word provides a new button on the toolbar to enable converting to PDF format. Once the owner has finished creating or modifying the document in Word, he/she would simply click the "Convert to Adobe PDF" button. The Table of Contents, hyperlinks, pagination, and hyperlinks are retained exactly as they appeared in the original MS Word document.

Maintenance

The updated PDF file must be provided to the Webmaster, who will post the document online. A single file contains an entire document – both text and graphics.

Online Use

The end-user must have version __ or later of the free Adobe Acrobat Reader software on his/her computer in order to view PDF documents online. For those who do not, a link will be provided from the CMS website to the Adobe website, from which the software can be downloaded in a few minutes. Once they have the software, they will be able to click any of the links on the CMS website to view the available PDF documents. The document will actually open in the Internet browser.

The PDF format provides a number of navigation aids to the online viewer, including hyperlinks and bookmarks. The bookmarks reflect all headings in the document, and can be shown along the left side of the document, much like the "Document Map" feature in MS Word. The bookmark list can be collapsed or expanded to the user's desired level of detail.

One drawback to the PDF format is that screenshots, the primary graphic used in our documentation, appear fuzzy unless they are viewed at about 180-200% of actual size. This is a known condition that Adobe acknowledges. Its only recommendation is to view them at the magnified size.

The following image illustrates how a section of a Business Process Guide will look to end-users when viewed online in PDF:

Use in Print

A printed copy of a PDF document looks essentially the same as a printed copy of an MS Word document. Table of Contents and pagination are retained per the original document. Screenshots may be just slightly fuzzier, but print more clearly than they appear online. The following pages provide a printed sample of a Business Process Guide in PDF.

Summary of Pros and Cons

HTML		**PDF**	
Pros	Cons	Pros	Cons
• Screenshots are sharp on line • Viewer needs no	• TOC and page references are invalid – both online and in print	• Both online and print retain valid TOC, bookmarks, hyperlinks,	• Screenshots are fuzzy online unless magnified • Screenshots not quite

additional software except browser	• No navigational aid in large documents	page references • Collapsible bookmark list enhances navigation	as clear in print as HTML • Requires Acrobat Reader software (free) to access

Recommendation

Because the advantages of online navigation and accurate pagination outweigh our concerns about the clarity of PDF screenshots in the online view, the EUA team recommends that PDF be adopted as the standard format for saving and distributing end user documentation. We do not feel that it is possible to take advantage of the HTML format without the adoption of other authoring tools.

We do recommend that user satisfaction with the PDF format be carefully monitored and that HTML authoring tools be explored as a possible means to a future upgrade of end user documentation.