BEFORE WE GET STARTED
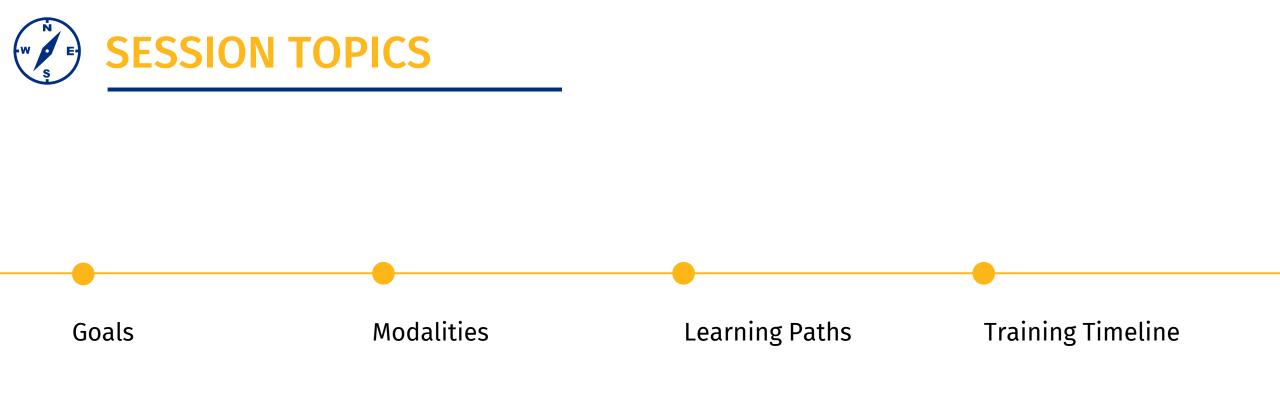
- This session will be recorded.

- The chat has been disabled, please use the Q&A function to submit questions.

- At the end of the session, time permitting, we will have a Q&A session.

- As a reminder, this preview session is not training. You will be introduced to new terms and concepts and see system sneak peeks!

SESSION TOPICS

Goals   Modalities   Learning Paths   Training Timeline

Training Program

Primary Goal

Support end users' successful transition from current state to future state by building new knowledge and skills about:

- Oracle Financials (OCF)
- Concur Travel & Expense
- Kuali Sponsored Programs
- Oracle Budget (EPM)
- Chart of Accounts (COA)
- Financial Boundary Systems

Objectives

Identify need
Identify end users needing training and the functions/ changes in business processes they need to be trained on

Design & Develop Training
Apply instructional systems design for training program development. Design training curricula to deliver the required knowledge and skills necessary to close the gap between the current and future state

Hybrid Learning Approach
Use a hybrid learning approach for the train-the-trainer model including a series of web-based trainings and workshop-oriented virtual instructor-led training (vILT)

Metrics
Establish training metrics to evaluate training completion and user competency/ confidence in the new system and supporting business processes

Learning Outcomes

Purpose: close gap between the current state and future state

High-level learning outcomes
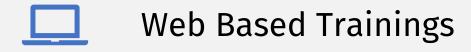
- Navigate within the appropriate financial systems
- Define changes to roles and responsibilities
- Describe changes in workflow and new business processes applicable to your role
- Execute functional tasks, queries and reports as applicable to your role
- Locate training resources and help

Specific and measurable learning objectives have been established for each ILT and WBT

Training Modalities

Web Based Trainings

Virtual Instructor-led Training Workshops

Oracle Guided Learning

Reasoning

Persona Based Learning

Objective: Meet diverse learners' needs by providing learner-centric learning paths

- Persona Based Learning Paths

- Web-based Trainings

- Instructor-led Workshops

1 **Smaller Units** - reduce cognitive overload; increase knowledge retention

2 **Asynchronous** - Web-based trainings (WBTs) can be completed at any time with a clear and consistent message to broad audience.
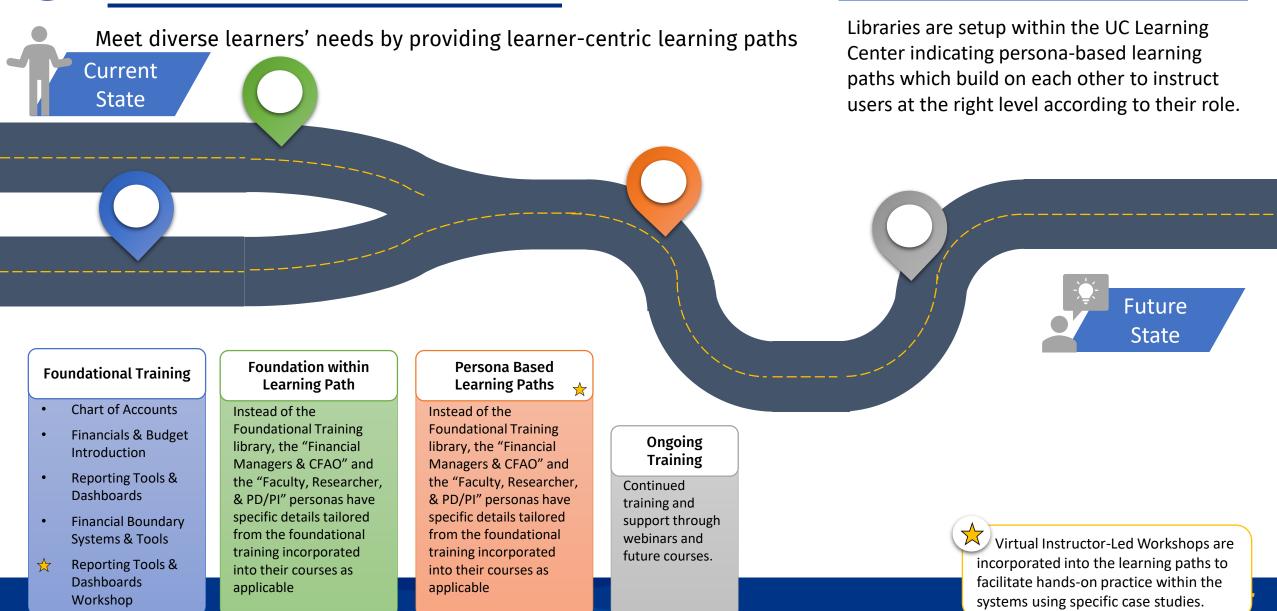
Some are also prerequisites for instructor-led workshops

3 **Synchronous** - Workshops with targeted case studies to build on WBTs. Practice, live questions, and troubleshooting with support.

Learning Paths

Learning Paths

Meet diverse learners' needs by providing learner-centric learning paths

How it Works

Libraries are setup within the UC Learning Center indicating persona-based learning paths which build on each other to instruct users at the right level according to their role.

Future State

Foundational Training

- Chart of Accounts
- Financials & Budget Introduction
- Reporting Tools & Dashboards
- Financial Boundary Systems & Tools
- ⭐ Reporting Tools & Dashboards Workshop

Foundation within Learning Path

Instead of the Foundational Training library, the "Financial Managers & CFAO" and the "Faculty, Researcher, & PD/PI" personas have specific details tailored from the foundational training incorporated into their courses as applicable

Persona Based Learning Paths ⭐

Instead of the Foundational Training library, the "Financial Managers & CFAO" and the "Faculty, Researcher, & PD/PI" personas have specific details tailored from the foundational training incorporated into their courses as applicable

Ongoing Training

Continued training and support through webinars and future courses.

⭐ Virtual Instructor-Led Workshops are incorporated into the learning paths to facilitate hands-on practice within the systems using specific case studies.

Training Metrics

Training metrics are established to evaluate the training program's effectiveness and learner engagement.

Training metrics help inform in many areas, including knowledge and skills development, end user readiness and user satisfaction.

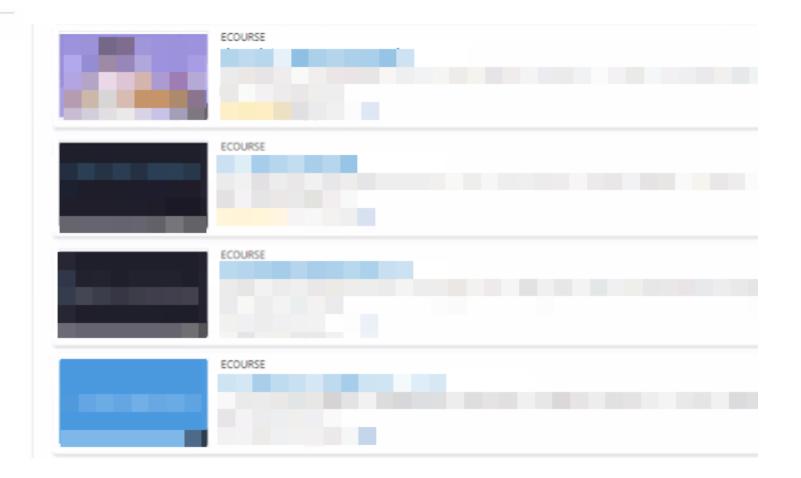Potential training metrics for each course include:

- Percent completion

- Average learner assessment score

- Retake rate for learner assessments

- Confidence with system

- Oracle production, user performance data (e.g., error rates)

UC Learning Center

Training Plan

Foundational Training ①

WBT
- Oracle: Budget & Financial Systems Introduction
- Oracle: UCR Chart of Accounts
- Reporting Tools & Dashboards
- Oracle: Financial Boundary Systems & Tools

ILT
- Oracle: Reporting Tools & Dashboards Workshop

Dept. Requestor/Transactor ②

WBT
- Oracle: Buying and Paying
- Concur: Travel Reimbursements
- Concur: Non-Travel Reimbursements
- ePay: Reimbursement Requests

ILT
- Oracle: Buying and Paying Workshop

Department Analyst ②

WBT
- Oracle: General Ledger & Budget
- Oracle: Project Portfolio Management for Contracts & Grants
- Oracle: Budget Development

ILT
- Oracle: Budget Workshop
- Oracle: Project Portfolio Management for Contracts & Grants Workshop

Financial Managers & CFAO

WBT
- Oracle: Financial Management
- Reporting Tools & Dashboards
- Oracle: Financial Approvals
- Oracle: Budget Development

ILT
- Oracle: Financial Management Workshop
- Oracle: Financial Management Reporting Workshop

Faculty, Researcher & PD/PI

- UCR Finance and Research Systems for Academics
- Oracle for Academics
- Kuali & Oracle: Contracts & Grants for Academics
- Concur for Academics
- Kuali: Research Systems & Tools
- Contracts & Grants for Academics Workshop
- UCR Finance and Research Systems for Academics Workshop

Other Sub-Libraries

Specialized Processes & Programs
- SAA Training
- PCard Training
- Travel & Entertainment Card
- PCI DSS Security Awareness Training (SAT)
- Cash Handling: The Basics
- Enterprise Accountability Online
- Foundation Gift Fund Details Report Overview
- Advanced Financial Reporting

Legacy Library
- Introduction to the Full Accounting Unit (FAU) Online
- Purchasing: SAA for eBuy
- SAA/EACS Training
- PIWRS: Annual Certification Online Tutorial
- PIWRS: Monthly Expenditure and Payroll Review Tutorial
- PIWRS: Principal Investigator Web Reporting System Tutorial

UC RIVERSIDE | Impact23

Why Rise360?

- Web app for fully-responsive courses

- Courses can be created and adjusted quickly

- Removes risk of large SCORM file corruption

- Review links create the opportunity for broad levels of feedback easily

- Compatible with the UC Learning Center

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Web Based Training Demo

Workshop Structure

Day-in-the-Life Examples
- Trainees will perform practice exercises or work through situations
- Case studies were curated from questions, use cases, and topics
- Available on the UC Learning Center

Hands-on Training Best Practices
- This is your time to practice in the system, it's okay to ask for clarifications
- Share relevant gotchas, common mistakes or questions with the group

Breakout Room Functionality
- While in a breakout room, you can communicate with others who have also joined that room
- Identify who will share questions/comments with the whole group once you return to the main session
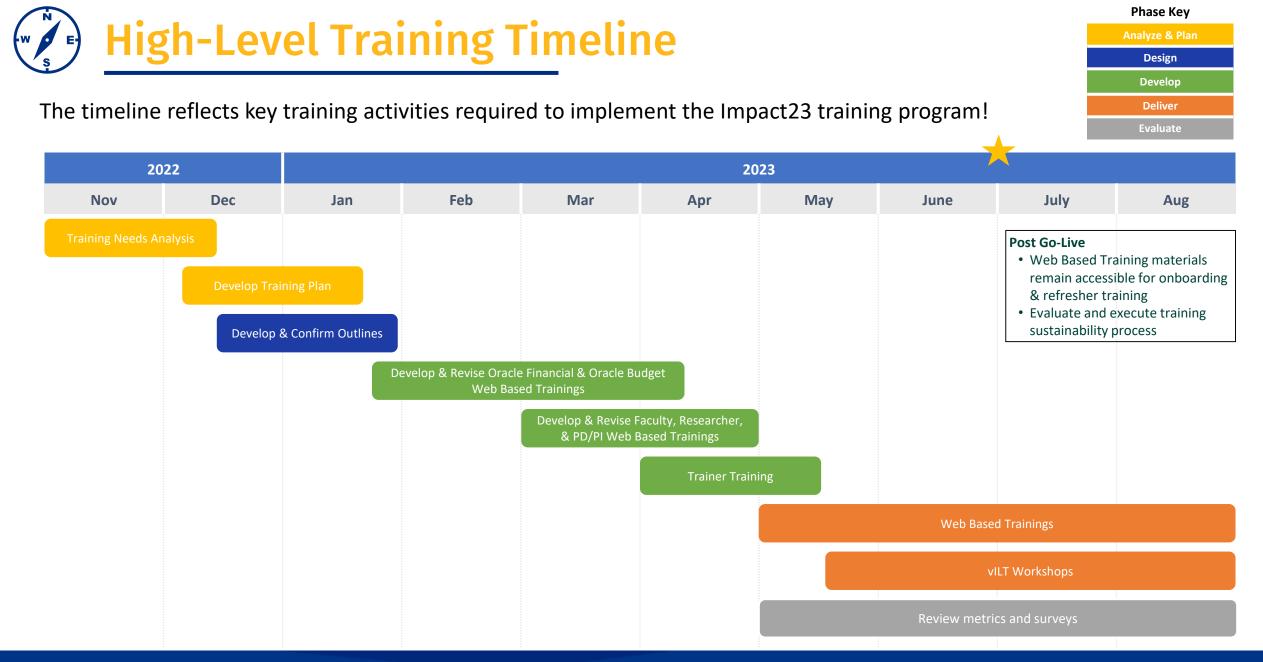- Provide feedback to the instructors directly or in the survey at the end of the course

Workshop Structure

https://youtu.be/1zXhCJE_oJg

Training Timeline

High-Level Training Timeline

The timeline reflects key training activities required to implement the Impact23 training program!

2022		2023							
Nov	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**June**	**July**	**Aug**

- Training Needs Analysis
- Develop Training Plan
- Develop & Confirm Outlines
- Develop & Revise Oracle Financial & Oracle Budget Web Based Trainings
- Develop & Revise Faculty, Researcher, & PD/PI Web Based Trainings
- Trainer Training
- Web Based Trainings
- vILT Workshops
- Review metrics and surveys

Post Go-Live
- Web Based Training materials remain accessible for onboarding & refresher training
- Evaluate and execute training sustainability process

IMPACT23 SUMMIT

Take Action

Take Action

Keep an eye out for April's Impact23 Newsletter!
- Web-based trainings
- Workshop dates

Web-Based trainings will be available to complete any time anywhere!

For most workshops, two sessions will be held in May, June and July, and then one session per month through the end of stabilization.

Reminder: Web-based trainings are pre-requisites for the workshops!

IMPACT23 SUMMIT