

Training for two UK administrative healthcare bodies

Unit4 Business World (Agresso) ERP



Optimum, the specialist IT training consultancy, has delivered an extensive training package for two London Primary Care Trusts (PCT) to ensure an efficient and cost effective changeover to their new integrated finance, procurement and business management systems.

Optimum has provided five clients within the two PCTs with a complete service from course design, through to delivery for both the finance users and other operational staff, plus a range of practical training materials on the system. These included 'back-at-desk help tools' such as reference guides and quick cards for post go live support as well as ongoing new user training.

The two PCTs have worked for a number of years using a shared service arrangement and opted for a joint implementation of the finance and procurement systems. However, the five clients within the two PCT structure have their own separate systems on a shared server, reflecting their different business processes. As a result, Optimum needed to tailor the content of its courses and training materials to each of the organisations as well as training the users separately where necessary.

Project Scope

- New implementation of the Unit4 Business World (Agresso) ERP system.
- Initially developed the training programme for 100 end-users, but the materials are due to be utilised by hundreds more in the future phases.
- Provided training to two PCTs across the finance and procurement modules.
- Both classroom and WebEx 'smart client' delivery sessions completed.

Methods Used



Optimum's highly structured approach and in-built quality control means that the PCTs' training documentation will be continuously updated to reflect changes as the systems are rolled out and developed.

The training programme involved the classroom delivery of courses for about a hundred financial and management accountants, budget holders and requisitioners, so it had to be delivered in as flexible, practical and efficient a way as possible. In the future, a full roll-out to several hundred staff is envisaged and the structured approach taken by using Optimum will help this process.

Optimum wrote the course materials on a modular basis by function but then split them into specific role-based courses to reflect the new streamlined business processes and electronic workflow being introduced.

The training methods also varied to suit each user group. That included running some 'smart client' courses from Optimum's central London training centre where the users accessed the database application via a complex, specially designed, secure, remote link using Citrix technology.

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