

Training for a leading university in the south east of England

Unit4 Business World (Agresso) ERP



When the University of Surrey decided to upgrade its finance system, Lester Woollard, their finance systems manager, realised they needed the support of a professional training provider to allow the project team to focus on the implementation. Based on previous, positive experience he had no hesitation in selecting Optimum to meet their training requirements.

The importance of professional training to ensure the staff support system change was already recognised by the University when they originally implemented their Agresso ERP system in 2005. The existing application was very different and, with such a large degree of change, it was important that users would 'buy into' process change and adapt to the new system.

Optimum was selected to provide user training as part of the initial implementation project. Woollard explains: "The training of users is a key factor in ensuring the success of a new system implementation and using professional trainers to achieve this can be vital." He continues: "This worked well as part of the original implementation project so we chose a similar approach with the upgrade."

Project Scope

- Upgrade to Unit4 Business World (Agresso) ERP system.
- Outsourced to a training consultancy to allow the project team to focus on the implementation.
- Optimum and the finance system team worked in collaboration to design the training programme.
- Optimum developed a wide-range of materials, the format of which depended upon each audience.

Methods Used



RapidScope®
Planning & designing your training



Reference Guides
Comprehensive end-user manuals



Trainer Packs
Lesson plans for consistent delivery



Presentations
Demonstrations to large groups



Online Solutions
Various web-based learning options



Quick Cards
Double-sided simple process cards



eLearning
Interactive modules & passive videos



Skill the Trainer
Prepare internal team for delivery



Classroom Delivery
Hands-on training sessions



Go-Live Support
Onsite floor-walking and hypercare

“We would definitely use Optimum for our training support requirements in the future.”

Lester Woollard Finance systems manager

The University already had an idea about which areas required training support, based on their previous implementation experience, so Optimum and the finance system team worked in collaboration to design the training programme.

Various training sessions were developed including face-to-face classroom sessions to cover web requisitioning and sales order training for around 200 users. Additional sessions were also designed to cover the authorisation of web requisitions for staff where it was appropriate for their role and quick reference cards were produced to support the classroom sessions back at the desk.

eLearning content was written to train staff on web expenses, as this was to be rolled out across the whole of the University as part of the current project. For the first time, the use of web entry for expenses was to become mandatory and, to ensure a smooth introduction, support staff were on-hand as a back up at the time of go live.

The University opted to use eLearning as the training mechanism for web expenses due to the number of staff across the university and the difficulty in coordinating a training schedule with academic staff commitments.

Additional eLearning content was also created to support requisition entry and approval, and sales order processing to compliment the classroom training and ensure users retained their knowledge.

“The feedback from the classroom training sessions was very positive”, advises Lester Woollard. “The eLearning has also proved itself and is an approach we will continue to use.”

The University plans to build on their eLearning capabilities so they can manage ongoing system or business changes in-house. Using the materials produced by Optimum, refresher training sessions are held on a monthly basis ensuring the business benefits, from the system upgrade, will be maintained longer term.

Woollard explains: “We now have access to good materials that are a basis for ensuring that users have the necessary knowledge to undertake their work.”

He concludes: “We would definitely use Optimum for our training support requirements in the future.”



Optimum Technology Transfer Ltd

Saxon House, 48 Southwark Street
London SE1 1UN

UK +44 (0)20 7776 9876

US +1 877 406 6078

www.optimum.co.uk

info@optimum.co.uk