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C-TMS Training Approach and Delivery

Calidus TMS - 12.45

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Reference: Maintenance

Contents

1 C-TMS Training Approach and Delivery

This document covers the training approach and delivery for C-TMS training. This guide is internal.

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2 Training Levels

C-TMS Training is broadly offered at three levels:

- **Level 1 - Overview Level**: Aimed at just a high level run through of processes from end-to-end as more of a familiarisation session. Typically run for management level staff or people involved at a distance that needs to be aware of the application but not necessarily the hands on detail. Duration approx. 1 day.
- **Level 2 - Operator level**: Aimed at covering the operational screens in detail, focusing on the full process flow but from a user perspective i.e. covering operational functionality within the system but not the specifics of setup and maintenance and the 'how it works' behind the functionality. Duration approx. 1 week.
- **Level 3 - Implementer**: Aimed at covering the operational screens in detail and the specifics of how to fully setup and configure the system. Stepping through all necessary master data setup, system setup options, issue resolution and operational functionality.

Variations on the above may be required based on the specifics of the project and so some tailoring may be required but it should be loosely based on the agreed structure above.

Information should be issued to the trainees in advance to allow them to familiarise with the agenda and content where possible - it will make the training easier the more they know upfront!

Ensuring that users can access the URL prior to the session start will remove the risk of having to deal with any time consuming access issues at the start of the training.

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3 Preparation and Plan

3.1 Candidate Training Matrix

First thing is to identify the list of trainees who will attend. Assessing their current ability level and what level of training is required, any particular needs with agreed components to cover, this also gives a record to capture the candidate feedback - the master list is stored on the network here:

> `\\DGA1FS01OBS\Projects\Product\CTMS\Training\Management\Candidate Training Matrix.xls`

This includes a breakdown of all candidate information.

3.2 Training Plan and Agenda

Next plan out the daily training sessions based on the agreed training level what content will be required and how this will fit into the scheduled time on a day-by-day hour-by-hour basis - sample level 1, 2 and 3 plans are here:

> `\\DGA1FS01OBS\Projects\Product\CTMS\Training\Training Plans`

Plan should be produced aimed at ideally a maximum 5 or 6 candidates per session - any more should be batched into repeat training sessions.

A PowerPoint agenda should exactly match the plan and should be used to illustrate the schedule for that particular days topics - at both the start of the day to position what will be covered and for review to summarise what has been covered at the end of each day. Any uncovered areas can then be moved to the next day's plan - ensure some slack at the end of the training to cover this.

3.3 Training Content - Lesson Signoff Sheets

The lesson sign-off sheets list the summary contents of each training module and should serve as a check list for the candidate and the trainer to know what you have covered off. It also serves as a list for the candidate to mark any areas which they didn't feel comfortable with. This is cover for both the trainer and trainee to ensure they don't leave the session feeing they are missing or lacking areas of knowledge.

> `\\DGA1FS01OBS\Projects\Product\CTMS\Training\Training Lesson Sign-off`

This covers all potential system areas and so a tailored version may be required to select just those topics to be covered.

There is a full master lesson list on one of the first worksheets.

Then a worksheet for each lesson which also has a link to the associated detailed user guide which is relative to that particular area.

💡 **Note:** This may require update for any new system functionality that has been developed since the document was last modified.

3.4 Training Material - User Guides

The supporting training detail documents, or user guides, are stored in a folder structure organised by key system areas or processes:

> `\\DGA1FS01OBS\Projects\Product\CTMS\Training\User Training Guides`

With breakdown into each specific function (largely based on individual screens) within that area, for example:

> `\\DGA1FS01OBS\Projects\Product\CTMS\Training\User Training Guides\4. Planning`

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All generic and customer tailored versions are stored here.

All documents are stored on C-TMS Assist:

- C-TMS_Training_Guides

💡 **Note:** New documents may be required based on new developments.

3.5 Training Pack

Ideally a physical handout pack should be created for the trainee to reference material more easily during the training session, to use alongside hands on system use. This should include overview material, plan, and lesson list and reference material

- CALIDUS TMS and OBS Introduction
    - ♦ Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\CTMS Overview\Overview Pack\C-TMS and OBS Introduction v3.0.doc
    - ♦ Wiki: C-TMS and Aptean Introduction
- CALIDUS TMS Modular Solution Map
    - ♦ Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\CTMS Overview\Process Flows
    - ♦ Wiki: Process Flows
- CALIDUS TMS Key Concepts
    - ♦ Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\CTMS Overview\Overview Pack
    - ♦ Wiki: C-TMS Key Concepts
- CALIDUS TMS Glossary of Terms
    - ♦ Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\CTMS Overview\Overview Pack
    - ♦ Wiki: C-TMS Glossary
- CALIDUS TMS Menu Hierarchy
    - ♦ Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\CTMS Overview\Overview Pack
    - ♦ Wiki: C-TMS Menu Hierarchy
- Copy of Training Plan
- Lesson List Booklet
- Training User Guides

3.6 System Data/Scenario's setup

To support the session any necessary implementation of the training environment should be carried out in advance with configured user's setup appropriately to access the reference information, including setup to facilitate any integration between systems as applicable.

4 Training Delivery

4.1 Overview

The training should be initiated with an overview to position company and systems summary, high level process flow, tailored to the implementation, key concepts and align terminology.

- Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\CTMS Overview
- Wiki: Category:Training Overview

4.2 Lesson Delivery

The trainees should have sufficient laptop - system access and basically a 'show-and-tell' approach should be taken to illustrate the lessons based on the Training User Guide content- allowing the trainee to follow you through the process on their own machine as you articulate the functionality.

The lesson sheet should be run through in brief initially to position what needs to be achieved and understood in the lesson, with the user ticking off as they are comfortable with each function or point of knowledge covered. The trainer can use the User Guide as an indicator of functionality to cover.

4.3 Training Exercises

To allow the trainee to learn at the appropriate point after a lesson or series of topics covered they should be challenged with some hands-on exercise to attempt to complete by themselves, asking questions where necessary.

- Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\Training Exercises

4.4 Review and Q&A

At the end of the lesson, review the actions covered and move on to the next. It is important to note any issues but move on and return to these if more time is required to ensure that the day runs to schedule. At the end of the day time should be allowed to sweep through a general Q&A of anything that has arisen throughout the day.

4.5 Debrief

At the end of the full training a questionnaire should be completed to gauge confidence and improve training approach:

- Filesystem: \\DGA1FS01OBS\Projects\Product\CTMS\Training\Management\Training Debrief
    - Training Questionnaire v2.0.doc

The scoring can then be captured in the Candidate Training Matrix covered above.

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5 Category:Training Guides

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6 Category:Training Overview

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