

**U. S. Department of Energy
(DOE)**

**CUSTOMER
INFORMATION TECHNOLOGY (IT)
SUPPORT SYSTEM
(CITSS)**

Final Training Plan

December 1997

**U. S. DEPARTMENT OF ENERGY
Office of the Chief Information Officer
and Headquarters Collaboration Group**

Change Control Page

The change control page will be used to record information for controlling and tracking modifications made to this document.

Revision Date: mm/dd/yy

Author: Author Name

a. Section(s):
Page Number(s):
Summary of Change(s):

b. Section(s)
Page Number(s):
Summary of Change(s):

c. Section(s):
Page Number(s):
Summary of Change(s):

d. Section(s):
Page Number(s):
Summary of Change(s):

Revision Date: mm/dd/yy

Author: Author Name

Section(s):
Page Number(s):
Summary of Change(s):

Revision Date: mm/dd/yy

Author: Author Name

a. Section(s):
Page Number(s):
Summary of Change(s):

b. Section(s):
Page Number(s):
Summary of Change(s):

Title Page

Document Name: Customer IT Support System
Final Training Plan

Publication Date: December 24, 1997

Revision Date: N/A

Contract Number: DE-AC01-95AD34277

Project Number: Task #: 25-044-07-7-07
CDSI #: 4012

Prepared by: Brian Field

Approval: Patrick Hargett, HR-441

THIS IS A WORKING DOCUMENT THAT WILL BE UPDATED AS THE PROJECT PROGRESSES. COMMENTS RECEIVED FROM THE CITSS PROJECT TEAM, CUSTOMERS, AND STAKEHOLDERS SHOULD ONLY BE CIRCULATED AFTER COORDINATION WITH THE PROJECT MANAGER.

CITSS Final Training Plan

Table of Contents

1. INTRODUCTION	1-1
1.1 Background	1-1
1.2 Scope	1-1
2. TECHNICAL TRAINING PROGRAM	2-1
2.1 Intended Audience	2-1
2.2 Objectives	2-1
2.3 Content	2-1
2.4 Delivery Method	2-2
2.5 Materials	2-2
2.6 Duration	2-2
2.7 Size	2-2
2.8 Schedule	2-3
2.9 Facilities	2-3
2.10 Evaluations	2-3
2.11 Updates	2-3
2.12 Staffing	2-3
2.13 Funding	2-4
2.14 Training Update	2-4
3. END USER TRAINING PROGRAM	3-1
3.1 Intended Audience	3-1
3.2 Objectives	3-1
3.3 Content	3-1
3.4 Delivery Method	3-1
3.5 Materials	3-2
3.6 Duration	3-2
3.7 Size	3-2
3.8 Schedule	3-2
3.9 Facilities	3-2
3.10 Evaluations	3-3
3.11 Updates	3-3
3.12 Staffing	3-3
3.13 Funding	3-3

1.1 Background

The Department of Energy's (DOE) Office of the Chief Information Officer (CIO) is implementing the Headquarters-wide Customer Information Technology Support System (CITSS) in order to provide improved and more customer centric support services to their customers. A component of this system is the Applix Enterprise Help Desk software. Training must be made available to the staff who will implement the system and to those who will use it to successfully complete their jobs. This document describes the approach that will be used to train the technical staff on the Applix Enterprise Help Desk software. It also describes the approach that will be used to train the members of the pilot groups support organizations. Finally, it will detail the methodology that will be used to prepare for training the remaining support team members and Federal staff as the system is implemented Headquarters-wide.

1.2 Scope

The document is divided into 2 major sections: Technical Training Program, and End User Training Program. The Technical Training Program and End User Training Program sections will address the following areas:

- Intended Audience
- Objectives
- Content
- Delivery Method
- Materials
- Duration
- Size
- Schedule
- Facilities
- Evaluations
- Updates
- Staffing
- Funding

2.1 Intended Audience

The Technical Training Program is intended for staff who will assist with the installation, configuration, and maintenance of CITSS. These staff will include the personnel assigned to tasks such as Applix screen development, notification and escalation rule implementation, report development and maintenance, data base development and maintenance, and mainframe system integration. They may also provide day to day administration and maintenance for CITSS and it's components.

2.2 Objectives

The objective of the training is for the student to gain enough knowledge and hands-on experience to customize an Applix Enterprise application package (i.e. CITSS) to meet DOE's needs.

2.3 Content

The following is a detailed view of the areas presented in each of the training sessions. Each session is scheduled to last ½ day.

Session Number	Agenda Items
1	Introduction to Applix Enterprise Product Installation & Setup Workcenter Module
2	Workcenter Workshop Data Dictionary Module Data Dictionary Workshop
3	Form Design Form Design Workshop
4	Query Design Query Design Workshop
5	Workshop - "Design a Time and Materials Billing Module"
6	Chart Design and Generation WorkFlow Logic Overview WorkFlow Logic Workshop

7	Notifications WorkFlow Debugger WorkFlow Browser Escalation
8	Keyword Index Server Application Administrator Functions Virtual Incident Processing Overview
9	Calendar Maintenance Data Tree Overview Management/Engineering Roundtable
10	Reporting Wrap-up/Summary

2.4 Delivery Method

The training will entail classroom instruction, with a one-to-one relationship between attendees and computer workstations. A lecture will be presented on each topic. Following the lecture, each student will complete hands on exercises to assist with their learning, where the exercises are discussed among the entire class upon their completion.

2.5 Materials

Each student will receive the following course materials:

- Application Administrator Training Guide
- Concepts and Planning Guide
- Concepts and Planning Guide Specifications
- Concepts and Planning Guide Additional Modules

2.6 Duration

The training will take place over the course of 5 consecutive work days (Monday - Friday) and will be scheduled from 8:30 - 5:00 each day.

2.7 Size

Up to 10 students may attend the training per session.

2.8 Schedule

This training will be scheduled immediately following the purchase of the Applix Enterprise Help Desk software. We anticipate that this training will be conducted in early October.

2.9 Facilities

The training will be conducted at CDSI Headquarters in Rockville, MD, DOE's Quince Orchard site, or Applix, Inc.'s Washington area office in Vienna, VA. The site will be dependent on the purchase date of the software and the availability of the training centers at the sites.

The CDSI and Applix sites have adequate room for 10 hands on students and adequate projection equipment for demonstrations and course exercises. The DOE site can accommodate 5 students with adequate equipment.

2.10 Evaluations

A course evaluation form will be given to each student upon the completion of the training session. The form will be designed to gather feedback on the instructor, the course outline and content, and the course materials. The feedback will be used to update and/or improve future training sessions.

2.11 Updates

Since the technical training will be provided by Applix, Inc., their staff are responsible for updating the training course and materials as required. Updates will be provided should there be significant changes to the Applix Enterprise Help Desk product or if the course evaluations dictate changes.

2.12 Staffing

Applix, Inc. staff will provide the instruction for the course. Their in-depth knowledge of Applix Enterprise, and it's associated COTS packages, makes them the best available trainers. Costs for Applix, Inc. training services will be covered through CDSI's task assignment with the Office of the CIO.

Some CDSI technical assistance may be required if the training sessions are held in CDSI's Corporate offices in Rockville, MD in order to configure the PC's in the training room. This support will be minimal and will require 1 person for approximately 1 day.

CITSS Final Training Plan

2.13 Funding

The cost for the Applix instructor, approximately \$4,000, will be funded through CDSI's task assignment with the Office of the CIO. There is no additional per person cost for the course.

2.14 Training Update

This training session took place on October 27 - 29, 1997 at the Quince Orchard facility. Five support personnel attended the training. The cost of the training was \$1,875, which was the cost of the Applix trainer. All topics in Section 2.3 of this document were covered, with special attention placed on Notifications, Escalations, and WorkFlow.

3.1 Intended Audience

The End User Training Program is intended for CITSS end users and managers. Initially, this group will consist of contractor technical support personnel, but will expand to Federal customers as the functionality of the system is expanded.

3.2 Objectives

The objective of this training program is to familiarize the end user with CITSS so they will be able to use it in their day-to-day jobs immediately.

3.3 Content

An end user's guide is under development and will be used to conduct the training. The end user's guide will be abbreviated and will briefly detail the functions of the system. The following topics will be covered in detail:

- Logging a Call
- Performing Caller Maintenance
- Assigning/Referring a Call
- Searching the Knowledge Base
- Using the White Board
- Using the Incident & Resolution Trees
- Closing a Call
- Reporting

The course will be based on DOE's specific implementation, but Applix, Inc's. user training course materials will be used as a guide.

3.4 Delivery Method

The training will entail classroom instruction, with a one-to-one relationship between attendees and computer workstations. A lecture will be presented on each topic. Following the lecture, each student will complete hands on exercises to assist with their learning, where the exercises are discussed among the entire class upon their completion.

3.5 Materials

Each student will receive a an end user's guide at the session. The end user's guide will be based on the user's training guide used by Applix, Inc. However, it will be tailored with DOE specific information, screens, and processes.

3.6 Duration

We anticipate that the course will run for ½ day. This estimate may change as the system and training materials are developed. The course will be offered twice on each scheduled training day. This will allow support teams to rotate their staffs through the training so that the impact is minimal to our customers.

3.7 Size

Up to 10 students may attend the training per session.

3.8 Schedule

The training schedule is as follows:

Group	Training Date
ER AOSS Support (G'tn)	1/29/98
EE AOSS Support (Fors)	2/5/98
HR Support (G'tn)	2/11/98
HR Support (Fors)	2/12/98
NN-50 AOSS Support (G'tn)	2/19/98

Training is scheduled for the week prior to the start of the pilot period for the support group.

3.9 Facilities

The training will be conducted in one of the training rooms available at DOE Headquarters in Germantown, MD or Washington, DC.

All sites have adequate room for 10 hands on students and adequate projection equipment for demonstrations and course exercises.

3.10 Evaluations

A course evaluation form will be given to each student upon the completion of the training session. The form will be designed to gather feedback on the instructor, the course outline and content, and the course materials. The feedback will be used to update and/or improve future training sessions.

3.11 Updates

Updates will be provided when there are scheduled maintenance releases of CITSS or if the course evaluations dictate changes.

3.12 Staffing

CDSI staff will provide the instruction for the course.

Some CDSI technical assistance will be required to configure the PC's in the training rooms. This support will be minimal and will require 1 person for approximately 1 day.

3.13 Funding

There is no additional per person cost for the course. Funding for the CDSI trainer will be provided through the task assignment. There is no cost associated with the use of the DOE training facilities.