

Query Manager Training Program

Data, Information and Knowledge Management



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Executive Summary

OMES ISD-Enterprise Business Services (EBS) is tasked with developing and providing innovative and cost-saving training for all PeopleSoft Enterprise users statewide for the modules currently implemented by the State of Oklahoma. The *Query Manager Training Program* offers agency partners a cost effective way to train employees in the art of building successful and valid queries.

Business Problem and Solution

OMES ISD implements and supports PeopleSoft Enterprise systems for the State of Oklahoma. On any given day, there are in excess of 20,000 users at more than 150 state agencies, boards and commissions using these systems, which include financial and human capital management modules. One of the most complicated functions agencies face is designing queries that can pull information from the millions of tasks performed in the system.

Queries are custom reports that must be carefully crafted to include only the information needed. This information is used to provide statistical information to the governor, the state legislature, oversight boards and the public. The individuals employed at various agencies who have the access and ability to build those reports are known as Query Managers.

Due to the complicated and technical nature of the skills required to be a successful Query Manager, many agencies relied on subject matter experts (SMEs) at OMES to build their queries. Because the number of requests far outnumbered the staff available to assist with the queries, OMES ISD-EBS offered Query Manager training to interested agency partners. The People Soft vendor, Oracle, was contracted to come to Oklahoma to teach a nearly week-long course at a cost of \$750 per person. This cost was passed on to the partner agencies.

Once training was completed, attendees were required to:

1. Build three successful and valid queries based on instructions from OMES ISD SMEs.
2. Submit queries to SMEs.
3. Wait for the SMEs' evaluations.

As of January 2013, approximately 60 people had received training, but less than half had attempted to complete the additional requirements listed above. Of those who attempted to complete the requirements, less than half "passed" and were granted security access as Query Managers.

In addition to the low success rate, those who attended the training complained that the information provided was not relevant to the State of Oklahoma or to their specific job functions.

Because the vendor offers this training around the world, they provide a standard curriculum that is used in all trainings. The estimated cost of customizing training for the State of Oklahoma was in excess of \$20,000 for *each* of the four modules we wanted to offer. This did not include the cost of bringing a trainer to Oklahoma to conduct the training.

Relevance and cost were the two biggest problems at that time, but OMES ISD had another problem; agency partners wanted the ability to build queries on their own. By March 2013, there were 32 people from seven agencies on the waiting list for query manager training; some had been on the list for more than two years.

In January 2013, OMES ISD hired a training coordinator with education and instructional design experience and tasked that employee with finding a solution to the problem.

Using a local consultant already working for OMES ISD and staff SMEs, a customized, relevant curriculum for Query Manager was developed for four separate modules: Accounts Receivable (AR)/Billing, Procurement, Financials, and Grants, Projects and Costing (GPC). Each training module adhered to the following criteria:

- Classes were limited to one day.
- Class size was limited to 15 students (in most cases).
- Tuition was \$350 per person to cover the cost of the consultant teacher and material development.
- A generic manual on the basics of query building was developed and then paired with topic-specific appendices, exercises and tests.
- Each student was required to build at least one successful and valid query during the class to pass and receive the proper security access.
- Classes were scheduled twice a year, in the spring and fall.

In the fall of 2013, at the request of end-users, an additional module was developed for Human Capital Management (HCM).

Spring 2013:

AR/Billing – 1 class

Procurement – 2 classes

Financials – 2 classes

GPC – 1 class

Fall 2013:

AR/Billing – 1 class

Procurement – 1 class

Financials – 1 class

GPC – 1 class

HCM – 1 class

Significance

This project has been extremely beneficial to our agency partners. Course evaluations were provided at the conclusion of each training session and all attendees responded.

Approximately six weeks after the training date, all participants received a follow-up survey. Response rates ranged from 32% in the spring to 25% in the fall. The intent of the survey was not only to gather information on the learners' satisfaction with the course, but also to gauge whether or not they were able to take their new knowledge and skills back to their offices and use them. In education, this is known as "knowledge transfer" and it is one of the key goals of workforce education.

As of December 1, 2013:

- 109 new Query Managers had been trained;
- 22 additional agencies could independently query information; and
- Enrollments for spring 2014 classes were strong.

Performance Measures

Evaluations completed immediately following each training session resulted in high ratings for the overall course, the materials and the instructor.

COURSE EVALUATION (N=109); SCALE: 1 TO 4					
Overall Course	GPC	AR/Billing	Procurement	Financials	HCM
Spring 2013	3.9	3.9	3.9	3.8	N/A
Fall 2013	4.0	3.83	4.0	3.66	3.87
Materials/Presentation/Test					
Spring 2013	4.0	3.9	3.9	3.6	N/A
Fall 2013	3.83	3.8	4.0	3.55	3.7

Learner comments were also very encouraging:

"I can't wait to write queries."

"Much better than the ORACLE training class."

"A very useful class."

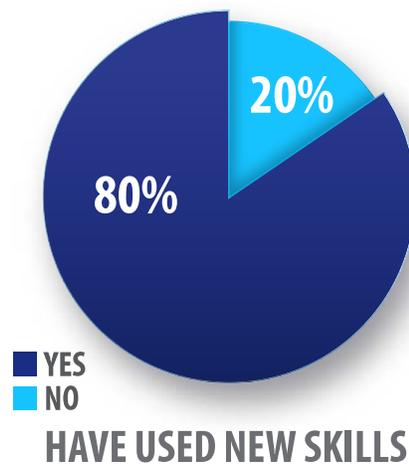
"Loved this class – ready to run Queries!"

“This class was really good. I feel I learned a lot.”

“I appreciated the difficulty level of the exercises as there were basic ones and others that were more challenging. Excellent information provided.”

“Training specific format was much more useful than the previous setup that was generic.”

The follow-up surveys indicated that respondents learned something new and useful to their job. Additionally, 80% indicated they had used their new skills to build or edit queries.



Costs

Although the merits of this project stand on their own, the cost savings realized by developing our own customized training program were tremendous. OMES ISD has estimated the cost of hiring a vendor to develop these same training modules would have been a minimum of \$100,000. Additionally, it would have cost tens of thousands of dollars more to bring in an instructor to teach each of the classes.

The use of an existing, long-term contractor, as well as our own resources, resulted in huge cost savings for the State of Oklahoma.

Additionally, our partner agencies were more than willing to pay for these training sessions. This was especially true for the fall classes, when news spread by word-of-mouth that the classes were well worth the cost for customized training that could be used upon leaving the classroom. Furthermore, the cost of \$350 represented a huge savings from the \$750 previously charged for this type of training.

Benefits

Prior to the development of the *Query Manager Training Program*, the best our partner agencies could expect was an expensive, generic, multi-day training event. These types of training programs frequently required homework assignments that sometimes took months for trainees to complete. Once completed, these assignments had to be evaluated by OMES-ISD SMEs. The process was unusually lengthy because of the time learners had to set aside to complete their assignments and the amount of time SMEs needed to evaluate their work.

The *Query Manager Training Program* resulted in immediate benefits, not only to OMES, but also to our agency partners that required access to PeopleSoft systems.

Project highlights include:

Efficiency: Learners from our agency partners no longer needed to set aside an entire work week for training and then find additional time to complete the “homework” queries. Now, they spend one day in training. Also, learners can practice what they learned, and demonstrate their abilities before leaving the classroom. To date, no one has failed to meet course requirements and obtain security access as a Query Manager.

Low Development Start-up Costs: Compared to the development costs of hiring a vendor to customize this training, OMES ISD was able to develop its own training courses cost effectively at about \$20,000. Additionally, OMES ISD was able to pass the savings on to agency partners. It is anticipated that the end-user cost of the class, currently \$350, will be reduced in the next fiscal year because project start-up costs have been satisfied.

Easy Access: The use of available resources for development and training allows OMES ISD to adjust class materials, times, and locations as needed. Ownership of the materials has also allowed for the correction, adjustment or addition of information to the curriculum without the need to renegotiate with a vendor.

Availability: By establishing a set class schedule, learners and their agencies know when classes are offered so they can plan their training schedule based on their needs. They also know that if demand dictates additional classes are needed, they can be added to the current class schedule.

End-User Satisfaction: Performance measures for this project indicate that end-users are extremely pleased, and more importantly, can successfully use what they learned. Ultimately, this is the most important goal of any workforce education initiative.