

MEMORANDUM

DATE: March 11, 1993
TO: Financial Affairs Advisory Committee
FROM: Colleen Briney and David Hyatt
SUBJECT: Financial Affairs Advisory Group BASIS Meeting
March 8, 1993 Minutes

This meeting involved discussion of the:

- BASIS progress report
- BASIS documentation
- Training Sessions
- Computer ids

The meeting was attended by Colleen Briney, David Hyatt, Katie Hill, Bill Moody, Paul Bixby, David Wimberly, Sandy Twiggs, Craig Brown, Jo Grippe, Deanna Nickel, Phyllis Shaw, Steve Ewens, Tom Dorre, Tina Lester, Lisa Danley, Jim Bronaugh, Jerome Rose, Nancy Whittaker, Ralph Treat, Larrie Stolfi, Chris Syphers, Yvonne Carrell, Glenn Grippe, Susan Adkins, Susan Cromwell, Karen Hendrix, Earlene Baker, Richard Shull, and Tom Rufer. Bonnie Green, Bill Heiny, Laura Dalton, John Stokes, and William Rains were not in attendance. Please contact me of any errors or omissions in this report.

BASIS progress report

Tom Dorre reported the BASIS Steering Committee will be meeting March 11 to finalize the implementation dates for BASIS modules. The actual implementation time table will be presented later.

BASIS documentation

David Hyatt identified the objectives for discussing the documentation issue. They are as follows:

1. Identify what types of documentation are needed for BASIS:
 - a. System documentation
 - b. University Business Policies and Procedures
 - c. User documentation
 - d. Training materials and tutorials
2. Define method for developing the documentation
3. Identify who (what departments) will develop and maintain the documentation.

As a result of using the BIS manual as a starting point the following ideas were presented and discussed:

Format for documentation

1. On-line field "PF1 help" is useful except when the terms or list of commands that are displayed are not well defined or understood by the user.
2. A comprehensive list of terminology and command definitions should be included in the documentation.

3. If hard copy documentation is written in plain English, it can be used as a self-study tool or as a resource to refresh the memories of those who will use the system occasionally. If documentation is not written well, then the user will resort to writing his own. It was noted that even a training manual where the user makes his own annotations during a training session is not always useful. Often times when the user gets back to his department and actually tries to use the system his notes and the manual don't help or work. In this case, the user needs a person he can telephone to get help.

4. Users need a manual which describes the system in terms of "how to process a requisition, an interdepartmental invoice etc.". A cookbook (step by step) approach to the system is useful.

5. Design a manual that is broken down into modules.

6. A quick and easy reference guide will be useful for circumstances where the skilled user in the department is absent and departmental personnel are left to learn how to survive on their own.

7. A table of contents is not sufficient. Documentation should include an in-depth index.

8. Because BASIS I and BASIS II screens and PF keys will be similar in format the documentation for all these applications should also have the same format. This will save the users from the added effort of reading different documentation formats.

9. The documentation has to be geared for users and an environment where:

- there is a high turnover in clerical staff

- the system is used infrequently and therefore a user cannot rely upon memory or experience to use the system

- the user has little computer skills (e.g. have difficulty using the help facilities or understanding how to even exit the help facility once they get in).

- faculty and chairpersons use the system after 5 o'clock.

- the user won't bother to read the documentation and gets himself in trouble.

- the user need explanations on how to "tab" from field to field.

- the user needs an explanation of what the screens look like and what they will look like if one makes a data entry error.

- there is different computer hardware in use (e.g. keyboards and access methods).

- the current log-on procedures discourages users today from even going on to learn how to use the systems we currently have in place.

Availability and Maintenance of Documentation

1. Documentation should be made available in a central location (the Bookstore or Computing Services) for all computer systems at the U of A.

2. Documentation should be developed centrally so that updating can be done efficiently. It is an enormous task to ensure that everyone's documentation is up to date.

3. It was proposed that documentation be maintained on-line where updates can be downloaded and printed at the user's site. It was noted that some folks will have to be trained on how to download and print and it may be easier and cheaper just to make the printed updates available.

4. Printing Services has the capability of printing documentation and making it available to the campus. In addition, User Services is making on-line documentation available with the added feature of keyword searches.

5. Users could be notified of new updates to documentation via e-mail, UArk Information or at log-on.

6. It was noted that the University Business Policies and Procedures manual is updated every biennium. The manual needs a better index.

7. Craig Brown mentioned that there are several alternatives for the current system which would allow direct accessing of documentation materials from a PC application.

Development of Documentation

1. Write the documentation and then observe a naive user attempt to use it. As the user raises questions change the documentation to meet those needs.

2. The Business Affairs and Financial Affairs personnel need to identify the most commonly asked questions and make sure these concepts are included in the documentation. It was noted, however, that until the BASIS systems are tested, the staff in Business Affairs and Financial Affairs will not know what new questions or commonly encountered problems will need to be included in the documentation.

Training Sessions

1. In light of the high employee turnover it was suggested:

- The BASIS manual be made available to employees at orientation session and employees are registered for training sessions at that time.

- Some departments cannot afford for a new employee be absent for time intensive training sessions.

2. With BASIS, new employees will need basic levels of computer training. Before they can be enrolled in the BASIS training sessions they would need to master a set level of skills. The University will need to develop a checklist of prerequisites for system training sessions.

3. The "Train the Trainer" concept involves the use of employees at the college or departmental level who have the expertise to train others within the department. The Agri Division said a problem with the Trainer concept is the fact that there is such a great demand due to turn-over and the use of increasing number of systems that there is not enough time to do the training. The training need has been overwhelming. The Trainer is usually an employee that has a regular set of responsibilities that cannot be attended to due to the demand of training. David Hyatt suggested that the demands placed upon this person would probably escalate because that person would have to become very familiar with the jobs of the people being trained. In addition, this person would tend to be relied upon as a troubleshooter. People fitting this description (a trainer) are probably already working extra now to keep up with regular duties, and additional training duties may overburden them.

4. User Services is planning to provide on-location training sessions called "Do you know your workstation?" These sessions help the users understand their hardware and how to use it (sign-on methods etc.).

Computer ids

1. The process and time frame for obtaining computer ids and access to computer systems will need to be improved.

2. Departments will need computer ids for their part time hourly workers during interim periods. The departments of Arkansas Union, Anthropology and Research and Sponsored Program were in favor of a proposal to make departmental heads responsible for managing temporary computer ids and access to computer applications via the desk concept.

3. It was stated that Computing Services and Human Resources were unsuccessful in getting employee computer ids deactivated at the time an employee is terminated. The procedure has never been implemented.

April 19 Agenda

The next Financial Affairs Advisory Group BASIS meeting is scheduled for Monday, April 19 2-4 PM in ARKU 311S. Please let us know if you have any BASIS issues you would like to discuss. An agenda for the April meeting will be sent later.