



BigTime Consulting Company

*Using GFR99*

# Training Design

8/17/1998





## Contents

<b>Background</b> .....	<b>1</b>
Need for Training	1
Constraints	1
Recommendations	1
Overall Goals	2
Benefits	2
<b>Training Overview</b> .....	<b>3</b>
Course Description	3
Modules, Agenda, and Audiences	3
Duration	4
Audiences and Their Learning Needs	4
Overall Learning Objectives	4
Prerequisites	5
Resources	5
Training Database	5
Evaluation Plan	5
Course Maintenance Considerations	6
Learning Strategy	6
<b>Module 1: Getting Started</b> .....	<b>7</b>
Audience	7
Duration	7
Description	7
Learning Objectives	7
Lecture Points	7
Activities	7
Developers	7
<b>Module 2: General Introduction</b> .....	<b>8</b>
Audience	8
Duration	8
Description	8
Learning Objectives	8
Activities	8
Developers	8
<b>Module 3: GFR Overview</b> .....	<b>9</b>
Audience	9
Duration	9
Description	9
Learning Objectives	9
Lecture Points	9
Activities	9
Developers	9

**Module 4: Application and Data Delivery..... 10**  
Audience 10  
Duration 10  
Description 10  
Learning Objectives 10  
Lecture Points 10  
Activities 10  
Developers 10

**Module 5: Policies ..... 11**  
Audience 11  
Duration 11  
Description 11  
Learning Objectives 11  
Lecture Points 11  
Activities 11  
Developers 11

**Module 6: Report Layout and Contents..... 12**  
Audience 12  
Duration 12  
Description 12  
Learning Objectives 12  
Lecture Points 12  
Activities 12  
Suggested Prizes 14  
Developers 14

**Module 7: Organization Database ..... 15**  
Audience 15  
Duration 15  
Description 15  
Learning Objectives 15  
Lecture Points 15  
Activities 15  
Developers 15

**Module 8: Aids and the Support Database..... 16**  
Audience 16  
Duration 16  
Description 16  
Learning Objectives 16  
Lecture Points 16  
Activities 16  
Developers 16

**Module 9: Executive Reporting..... 17**  
Audience 17  
Duration 17  
Description 17  
Learning Objectives 17

Lecture Points 17  
Activities 17  
Developers 17

**Module 10: Technical Details ..... 18**

Audience 18  
Duration 18  
Description 18  
Pre-Requisite Skills 18  
Learning Objectives 18  
Lecture Points 18  
Activities 18  
Developers 18

**Module 11: GFR Data Analysis ..... 19**

Audience 19  
Duration 19  
Description 19  
Learning Objectives 19  
Lecture Points 19  
Activities 20  
Developers 20

⋮

# Using GFR99 Training Design

## Background

### Need for Training

BigTime Consulting Company (BTCC) is rolling out an updated version of the Global Financial Reporting (GFR) system. Experienced users will need to learn what is new and different; new users will need to get up to speed from the beginning.

The system has several distinct groups of users, each having somewhat different needs. These are presented in more detail under *Modules, Agenda, and Audiences* on page 3.

### Constraints

There are several constraints on the design of this training:

- The amount of time that people have available for training on GFR is short and their time is valuable. People should not be asked to sit through content that is not needed by them.
- The training will begin in about six weeks (September 21, 1998).
- Training for later new hires will be a separate project.
- The training will be delivered in locations throughout the world.
  - Care must be taken to make the training acceptable to culturally diverse audiences.
  - Some training locations will be in BTCC offices; others will be in hotels.
  - Hands-on time with PCs and access to the database through the network is infeasible.
- Only one session is planned for each location. This session will have up to 60 people in some locations.

### Recommendations

1. Develop instructor-led training in Microsoft Office 97 (Word paper materials with PowerPoint slides).
2. Include as many training activities as possible without using hands-on PC time, including games. Keep lectures to a minimum.
3. Develop job aids wherever possible.
4. Plan the topic sequence so that the various groups can leave when their needs are met.

5. After the initial rollout is complete, convert the above training to self-study (CBT or other) to serve the needs of new hires.

## Overall Goals

The training will enable new and existing users to:

- Generate standard and customized reports needed for their jobs.
- Interpret these reports correctly.
- Access the help database, review the existing help requests and their responses, and initiate a new help request.

## Benefits

As a result of successfully completing this course, BigTime Consulting Company will receive the following benefits:

- More accurate management of financial factors.
- Better prediction of future financial states.
- Earlier awareness of financial problems.

## Training Overview

### Course Description

*Using GFR99* is a multi-purpose training course that provides working knowledge to several audiences about the 1999 version of the Global Financial Reporting (GFR) system. The main segment of the training is for all users, new and experienced; it provides an overview on using the system and interpreting its reports. A separate beginning module for only new users provides them with the background information that the experienced users already have. Other separate modules for users requiring deeper understanding of the workings of the system are provided on a separate day.

### Modules, Agenda, and Audiences

#### Day One

Start Time	Topic	New User	Exp User	Prac Exec	Spec & Anyst	Devel by
8:00	1 Getting Started	X		?		DL
8:30	2 General Introduction	X	X	X	X	DL
8:45	3 GFR99 Overview	X	X	X	X	DL
9:45	(break)					
10:00	4 GFR99 Data & Application	X	X	X	X	PF
10:45	5 GFR99 Policies	X	X	X	X	DTi
11:45	(lunch)					
12:45	6 GFR99 Reports	X	X	X	X	DTTo BP
2:45	(break)					
3:00	7 GFR99 Org. Database	X	X		X	PF
3:30	8 GFR99 Support	X	X	X	X	JO
4:00	(end of day 1)					

#### Day Two

Start Time	Topic	New User	Prac Mgr	Prac Exec	SpecAn al	Devel by
8:00	9 Executive Reporting				X	PF
8:30	10 Technical Details				X	JO
9:30	11 Data Analysis				X	JO
12:00	(lunch)					
1:00	11 Data Analysis, continued				X	JO
4:00	(end of day 2)					

## Duration

The duration of *Using GFR99* course differs for the different audiences:

Audience	Duration
Practice (non-financial) Execs.	1/2 day
Practice Mgrs., Finance Mgrs., and Finance Execs.	2/3 day
New Users	3/4 day
Specialists and Analysts	2 days

## Audiences and Their Learning Needs

The upgraded version of the Global Financial Reporting (GFR) will have several groups of users:

- New users who have never seen or used GFR
- Practice managers who have used the previous version
- Practice executives who have used the previous version
- Finance executives and managers who have used the previous version
- Specialists and analysts who were designated as user support for the previous version and will serve the same role for the new version.

The learning needs of these different groups are all somewhat different:

- **New users** need to know:
  - The business and financial models on which the system was based
  - The function that the GFR system serves.
- **Practice executives** need to know
  - How to obtain executive reports
  - How to interpret executive reports.
- **Finance executives** and managers need to know the same things as practice executives plus:
  - How to obtain regular reports and how to interpret them
  - How the data was obtained and manipulated.
- **Practice managers** need to know:
  - How to obtain regular reports
  - How to interpret regular reports.
- **Support specialists and analysts** need to know:
  - How to obtain regular reports and how to interpret them
  - How to create custom reports
  - How the data was obtained and manipulated
  - How to troubleshoot data problems in the reports.

## Overall Learning Objectives

All graduates of this training will be able to:

1. Operate the GFR interface.
2. Generate standard reports appropriate for their work assignment.
3. Customize the standard reports to better meet their work needs.
4. Interpret the standard and the customized reports.
5. State and adhere to policies and procedures related to the input of data and the generation of reports.

6. Correctly code fields related to the organization database.
7. Access existing usage aids in the GFR support database and enter a new request for aid.

In addition, analysts and specialists will be able to:

8. Describe the flow of data from the FS90 system into the GFR system and the manipulations it undergoes.
9. Troubleshoot data problems involving the GFR system.

## Prerequisites

There are no prerequisite skills and knowledge for day one of this course.

For day 2, users are expected to be experienced authors of SQL queries.

## Resources

The resources for this course are different for different modules.

Module	Instructors	Equipment	Facilities	Supplies
Getting Started	CFG	AV	Seating for up to 60	Participant Guide Notetaking supplies Job aids
General Introduction				
Overview				
Application				
Policies	Tech	3 linear feet of table space per person		
Reports	CFG			
Organization Database	MU and GSO/BI	AV	Seating for up to 12	
Support	CFG			
Executive Reporting	CFG, MU, and GSO/BI	1 computer per person with connection to GFR database	5 linear feet of table space per person	
Technical Details	CFG			
Troubleshooting	CFG, MU, and GSO/BI			

## Training Database

A training database is necessary so that:

- Each class can be started with the same information.
- The participants of day 2 can change the information during the exercises.

The training database must have the following characteristics:

- Enough realistic data that sample output can be generated for each standard report.
- Some erroneous data for the troubleshooters to locate and correct.

## Evaluation Plan

Two levels of evaluation are planned:

- A final determination of the value of the training (Kirkpatrick level 1). This will be done using a standard BTCC training survey.
- A final check of learning (Kirkpatrick level 2). A knowledge quiz will be developed based on the learning objectives.

## Course Maintenance Considerations

No maintenance is necessary for this version of the course; it is rollout training. However, a self-study version is planned to handle new users after the rollout training has been completed. This course will need maintenance. A separate design will be developed for this version of the training; course maintenance will be handled in that design.

## Learning Strategy

Different learning strategies are following for day one and for day two.

### *Day One*

The primary learning vehicle will be lecture and walkthrough. Sample screens will be projected by audiovisual means and sample output will be projected or distributed on paper as appropriate.

Every effort will be made to convert lectures into activities so that the interest level is elevated and retention is increased. Such activities include:

- Small group analysis and presentation of reports.
- Competitive games for locating information in the GFR output.
- Etc.

### *Day Two*

The primary learning vehicle will be lecture and walkthrough, plus practical troubleshooting of realistic situations.

## Module 1: Getting Started

### Audience

New users  
Non-financial executives (Optional)

### Duration

Approximately 30 minutes.

### Description

This module provides a high-level introduction to the GFR system, the business needs driving the system changes and basic terminology.

### Learning Objectives

Upon completion of this module, participants will be able to:

- Describe the basic features of the GFR system.
- Describe the GFR data process.
- Define terms needed to effectively use the GFR system to generate financial reports.

### Lecture Points

- Need for GFR
- Accounting Models
- GFR Data Processing Overview

### Activities

- Illustrated lecture

### Developers

- Content Expert: Lisa X.
- Training Expert: Diane X.

## Module 2: General Introduction

### Audience

All participants

### Duration

Approximately 15 minutes.

### Description

In this module, participants receive introduction to the facilitators, the course agenda, and course objectives. It also provides an opportunity to manage participant expectations.

### Learning Objectives

Does not apply

### Activities

Lecture and introductions

### Developers

- Content Expert: None needed
- Training Expert: Diane X.

## Module 3: GFR Overview

### Audience

All participants

### Duration

Approximately 60 minutes.

### Description

In this module, participants are provided with an overview of the GFR system and the GFR-generated reports.

### Learning Objectives

Upon completion of this module, participants will be able to:

- Describe the overall framework of the GFR system.
- Differentiate between the FS90 system and the GFR system.
- Describe the effects of the GFR reporting and processing changes on doing business in 1999.
- Explain the purpose of the main GFR financial reports.

### Lecture Points

- GFR System Components
- The FS90 System versus the GFR System
- Effects of the GFR Reporting and Processing Changes on Doing Business in 1999
- Main GFR Financial Reports

### Activities

- Illustrated lecture

### Developers

- Content Expert: Lisa X.
- Training Expert: Diane X.

## Module 4: Application and Data Delivery

### Audience

All participants

### Duration

Approximately 45 minutes.

### Description

In this module, participants are

### Learning Objectives

Upon completion of this module, participants will be able to:

- Recognize the changes to the user interface.
- Generate and filter standard reports.
- Create scripts to facilitate monthly reporting.
- Recognize the benefits of the new data delivery system and the impact on the end-user

### Lecture Points

- Running GFR
- Navigating in GFR
- Generating Standard Reports
- Customizing (Filtering) Standard Reports
- Automating Reports (Scripting)

### Activities

- Demonstration (perhaps using canned screens)

### Developers

- Content Expert: Lisa X.
- Training Expert: Paula X.

## Module 5: Policies

### Audience

All participants

### Duration

Approximately 60 minutes.

### Description

In this module, participants are

### Learning Objectives

Upon completion of this module, participants will be able to:

- Describe revisions to policy due to changes in FS90, changes to GFR processing and reporting, and the FY 1999 planning process.
- Describe new policy requirements as a result of implementing the new FY 1999 economic model which will drive our business.

### Lecture Points

- Revisions to existing policy
- New policies created

### Activities

In this module, participants will break into groups to discuss the major differences between the old and the new policy. Participants will provide an assessment of these changes in terms of the benefits and potential issues related to the changes. The sequence of events follows:

- **Preparation:** (10 minutes) The instructor will announce pre-determined groups. Each group will be made up of individuals from the same Business Organization. The policies assigned to each group will be critical to that Business Organization. Groups will be provided a list of the revisions. Instructions will be given. Each group will be given blank transparencies and a marker.
- **Small Group Discussion** (20 minutes): Discussion within the group will focus on the reasoning behind the revisions and an assessment of the changes (i.e., What are the benefits to this change? Are there any potential issues that could arise?) The discussion points will be written on the transparencies to be turned back in to the instructor.
- **Debriefing** (30 minutes): The instructor will use the transparencies created by the groups to cover the revisions and additions to policy. To encourage interaction, the instructor will ask the group members to highlight their findings, adding to the discussion if any important points were missed.

### Developers

- Content Expert: Lisa X.
- Training Expert: Paula X.

## Module 6: Report Layout and Contents

### Audience

All participants

### Duration

Approximately 120 minutes.

### Description

In this module, participants learn in detail about the GFR reports. The first section is an activity that helps participants describe key information about each report. The second section is an activity that gives them the opportunity to use the report to answer questions.

### Learning Objectives

Upon completion of this module, participants will be able to:

- Describe each of the GFR reports including the key information on the GFR reports, who uses each report, and how it is used.
- Identify the columns and line items on each of the key reports.
- Use the reports to make value judgments about the data.

### Lecture Points

The following reports constitute the main “lecture” points.

- Pro Forma Earnings Summary
- Pro Forma Earnings Detail by Payroll/Nonpayroll
- Pro Forma Earnings Detail by Type of Work
- BPM Contract Report
- Cost Recovery
- Cost Detail – Payroll and Nonpayroll
- Payroll Detail
- Direct Non-Payroll Detail
- Market Utilization Project Detail
- Client Activity Log
- Sales and Backlog
- Inventory and Receivables

### Activities

#### 1. What is this report?

In this activity, participants describe the key information for each of the reports produced by the GFR application. Participants are divided into 12 or fewer groups with 2 or more people in a group. Each group is assigned a report(s) to research and describe to the rest of the group. The goal of the activity is for each group to be able to explain the highlights of the report in 2 minutes or less.

Below is the sequence of events for the activity:

1. The instructor assigns groups, hands out a packet of resources to each group (see resources listed below), assigns each group a report(s), and reviews the instructions with the groups. (about 10 minutes)
2. The instructor writes the
3. The following questions on the whiteboard or flipchart in order to assist the groups in defining their report:
  - Who uses the report?
  - What data populates the reports?
  - What are the main items of the report?
  - How is the report used?
4. Participants work in their groups to prepare a flipchart or transparency with the highlights of the report and designate a spokesperson to explain their findings. (about 15 minutes)
5. Each group's spokesperson presents the highlights of the report in 2 minutes or less. (about 30 minutes). The instructor adds any additional key information for each report before introducing the next group.
6. The instructor debriefs the entire activity using the debrief questions listed at the end or uses another debriefing method. (about 5 minutes)

#### **Resources for Activity 1**

The following resources are necessary for the participant to complete the activity:

- GFR User Report Requirements (needs refining)
- Printed reports (need reports with actual data)
- GFR Reports job aid (to be developed)
- Flipchart or transparencies to use for the presentation.

#### *2. How to Use the Reports?*

During this section of the module, participants in small groups compete in a contest to review each of the reports and answer questions about the data they contain. The goal of the activity is for each group to try to answer as many questions correctly as possible during the assigned time. The groups will be the same groups as in activity 1. Each group receives a set of 36 questions about the reports (3 questions per report) and a job aid that defines every line of every report.

1. Below is the sequence of events for the activity:
2. The instructor hands out the job aid and a packet of questions to each group and reviews the instructions with the groups. (about 5 minutes)
3. Participants work in groups to answer the questions by reviewing the reports. Each group consolidates their answers onto 1 answer sheet. (about 25 minutes)
4. The instructor reads and briefly explains the answer to each question. (about 30 minutes).

**Resources for Activity 2**

The following resources are necessary for the participant to complete the activity:

- GFR User Report Requirements (needs refining) [job aid]
- Printed reports (need reports with actual data).

**Sample Questions**

Note: We will work with content experts to identify specific questions. A couple of sample questions are listed below:

- Pro Forma Earning Detail by Payroll/Nonpayroll Report
  - What percentage of delivery capability are solution centers?
  - How much is the actual load relief for human resources?

**Debriefing**

The debriefing includes reading the answer to the question, briefly explaining the answer and answering any questions. For example, the answer to sample question 1 above might be:

- XXX % - This answer is found by looking at line 21.7, sub-column % in the TOTAL column.

**Suggested Prizes**

BigTime Consulting Company gear, candy, or gift certificates

**Developers**

- Content Expert: Lisa X.
- Training Expert: Diane X.

## Module 7: Organization Database

### Audience

All participants

### Duration

Approximately 45 minutes.

### Description

In this module, participants are

### Learning Objectives

Upon completion of this module, participants will be able to:

- Describe how Organization Data in FS90 impacts GFR reports.
- Identify the elements which make up the Organization Database: GMU/LMU, Jobs, and Projects.
- Define the function of each parameter associated with an Organization Database element.
- Describe the effect of inputting incorrect codes (i.e. Business Organization Finance Teams).
- Select from a job aid the valid codes that may be used to define a specified parameter.

### Lecture Points

- How Organization Data in FS90 Impacts GFR Reports
- Organization Database Elements
  - GMU/LMU
  - Jobs
  - Projects
- Coding
- Coding Examples
  - Correct
  - Incorrect

### Activities

- Lecture / demonstration
- Exercise (or game): Coding Correctly
  - Participants determine whether the codes are correct for a given example. If incorrect, they supply the correct code.

### Developers

- Content Expert: Lisa X.
- Training Expert: Paula X.

## Module 8: Aids and the Support Database

### Audience

All participants

### Duration

Approximately 30 minutes.

### Description

In this module, participants are

### Learning Objectives

Upon completion of this module, participants will be able to:

1. State where to obtain help for different types of problems: GFR, FS90, office tools, etc.
2. Access the GFR support database.
3. Locate specified topics in the GFR support database: answers to previous help questions, calendar of GFR releases, report layouts and descriptions, copies of training materials, etc.
4. Post a new question/request to the GFR support database.

### Lecture Points

- Where to Get Help
  - Job Aid
- The GFR Support Database
  - Accessing
  - Understanding the Contents and Organization
  - Navigating and Opening Documents
  - Searching by Keyword
  - Posting a New Question/Request

### Activities

- Lecture / demonstration (perhaps using canned screen copies).
- Game: Whom to Call
  - Participants work in small groups to determine the support category for a series of support questions, then select the person to call for support. The group with the most right in 5 minutes will a token prize.

### Developers

- Content Expert: Lisa X., Matt X., Marty X., or Daryl X.
- Training Expert: Jerry Oehler

## Module 9: Executive Reporting

### Audience

All participants

### Duration

Approximately 30 minutes.

### Description

In this module, participants are

### Learning Objectives

Upon completion of this module, participants will be able to use a job aid to:

- Access and print summary level reports.
- Select report parameters.
- Print reports.

### Lecture Points

- Accessing Summary Level Reports
- Selecting Report Parameters
- Printing Summary Level Reports

### Activities

- Lecture / demonstration
- Exercise (or game): Selecting Report Parameters
  - Participants select the correct report parameters for a given reporting need.

### Developers

- Content Expert: Lisa X.
- Training Expert: Paula X.

## Module 10: Technical Details

### Audience

Specialists and analysts

### Duration

Approximately 1 hour

### Description

In this module, participants are shown where the data in the GFR reports comes from and how it gets there. Starting with the FS90 inputs, the flow of data is traced through the FS90 system to its mainframe database tables, into the GFR system and its tables, and into the various GFR reports.

### Pre-Requisite Skills

- Use SQL to directly access data in the GFR system.

### Learning Objectives

Upon completion of this module, participants will be able to:

- Describe the flow of data into the FS90 system and into which mainframe database table each type of data is placed.
- Describe the flow of data from the FS90 system to the GFR system.
- Describe the data manipulations in the GFR system and into which GFR table each type of data is placed.
- Interpret the GFR tables and data dictionary, and use them to look up codes.

### Lecture Points

- FS90 Inputs
- FS90 Mainframe Database Tables
- GFR Data Retrieval, Processing, and Tables
- GFR Reports

### Activities

- Lecture / demonstration

### Developers

- Content Expert: Lisa X., Matt X., Marty X., or Daryl X.
- Training Expert: Jerry Oehler

## Module 11: GFR Data Analysis

### Audience

Specialists and analysts

### Duration

Approximately 5 hours.

### Description

In this module, participants learn to trace data both forward and backward in the FS90 and GFR systems in order to verify whether it is correct and where it came from. Participants are shown specific examples of simple and then complex data flows and, for each example, work similar exercises to develop skill at tracing data in all situations. As a result of these skills, participants will be able to report to the responsible parties whether a given datum is correct or the reason that it is incorrect.

### Learning Objectives

Upon completion of this module, participants will be able to:

- Analyze apparently erroneous data to determine whether it is truly erroneous or correct.
- Determine the cause of erroneous data, such as: incorrect coding of fields, incorrect data entry, incorrect data manipulation by the FS90 system, and incorrect data manipulation by the GFR system.

### Lecture Points

- Simple Data Processing Situations
  - Time Distribution
    - ◆ Example
    - ◆ Exercise
  - Project Accounting
    - ◆ Example
    - ◆ Exercise
  - Client Accounting
    - ◆ Example
    - ◆ Exercise
  - General Accounting
    - ◆ Example
    - ◆ Exercise
- Complex Data Processing Situations:
  - Over/Under Absorption
    - ◆ Example
    - ◆ Exercise
  - Redistribution
    - ◆ Example
    - ◆ Exercise
  - Loading

- ◆ Example
- ◆ Exercise

## Activities

- Lecture / demonstration (processing examples)
- Hands-on computer exercise (processing exercises)

## Developers

- Content Expert: Lisa X., Matt X., Marty X.,  
or Daryl X.
- Training Expert: Jerry Oehler