



APS

Virtual Summit

Building an Infrastructure for Supporting
Your APS Users

Your Facilitators



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- 1 Zoom Features
- 2 The 3 Levels of Support
- 3 Introduction to Train the Trainer Model
- 4 Self-Service Resources

Zoom Features

Leverage the **Chat** and **Raise Hand** features to submit questions/comments or volunteer to speak.

The screenshot displays a Zoom meeting interface. The main window shows a presentation slide with the EAB logo and the text "EAB Virtual Meetings 2020". A small video thumbnail of a "Meeting Host" is visible in the bottom right corner of the main window. The bottom toolbar contains icons for Mute, Stop Video, Invite, Participants (with a '2' indicator), Share, Chat, and Record. The "Participants" icon is highlighted with a yellow box. To the right, the "Participants" panel shows two participants: "Test Participant (Me)" and "Meeting Host (Host)". Below the participant list are icons for "Raise Hand", "yes", "no", "go slower", "go faster", and "more". The "Zoom Group Chat" section is also visible. A text input field at the bottom of the chat window is highlighted with a yellow box.

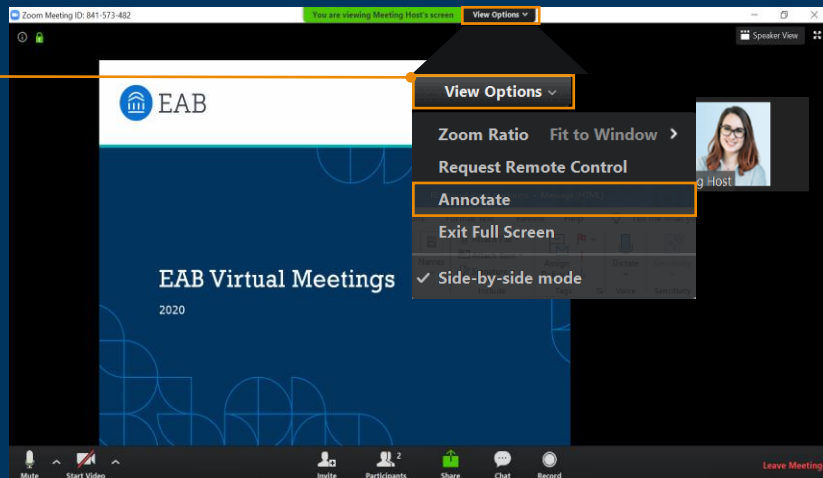
Use icons to communicate answers and signals to presenter

Open Participants and Chat

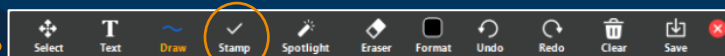
Select whether you want to chat with everyone or a specific person

How to Use the Annotate Feature in Zoom

Step 1: View Options, then Annotate.



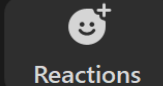
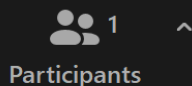
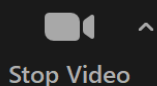
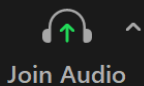
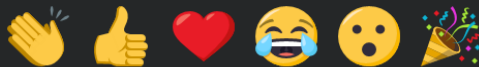
Step 2: Panel with different options for annotation. Please select Stamp.



Polling the Room

How many of you have had a Department Chair or other faculty member come to you with questions about APS that you were unable to answer?

React with a "Thumbs Up"
Sign if this is true for you.



Polling the Room: Which Statement(s) Apply to Your Institution?

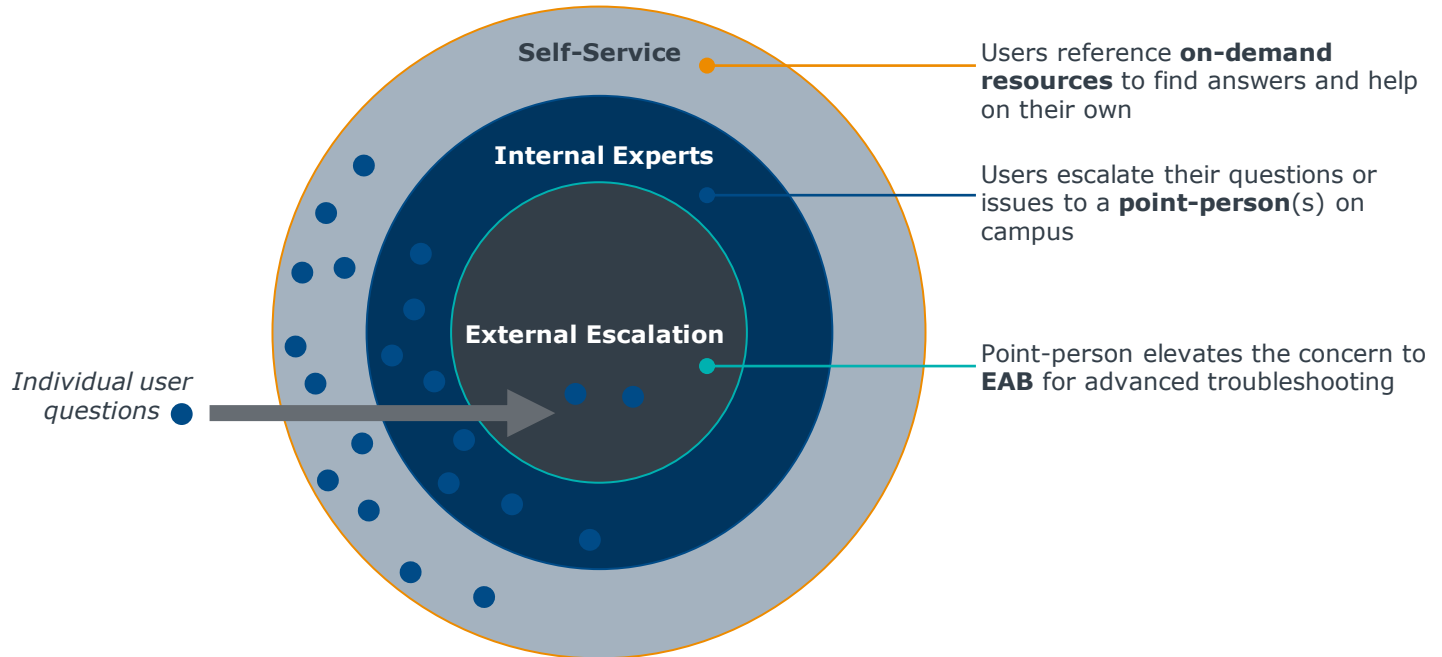
In the appropriate spaces below, use the Annotate feature to place a stamp where the statement applies to your institution.

| Statement | Place Your Stamp in This Column! |
|---|----------------------------------|
| We have a designated internal APS expert on campus. | |
| We have held internal training sessions on the APS platform (trainings not led by your APS Strategic Leader). | |
| We have an online central hub (microsite) where faculty and staff can go to access resources on APS. | |
| We have an FAQ document for APS. | |

Creating Infrastructure to Support APS Users

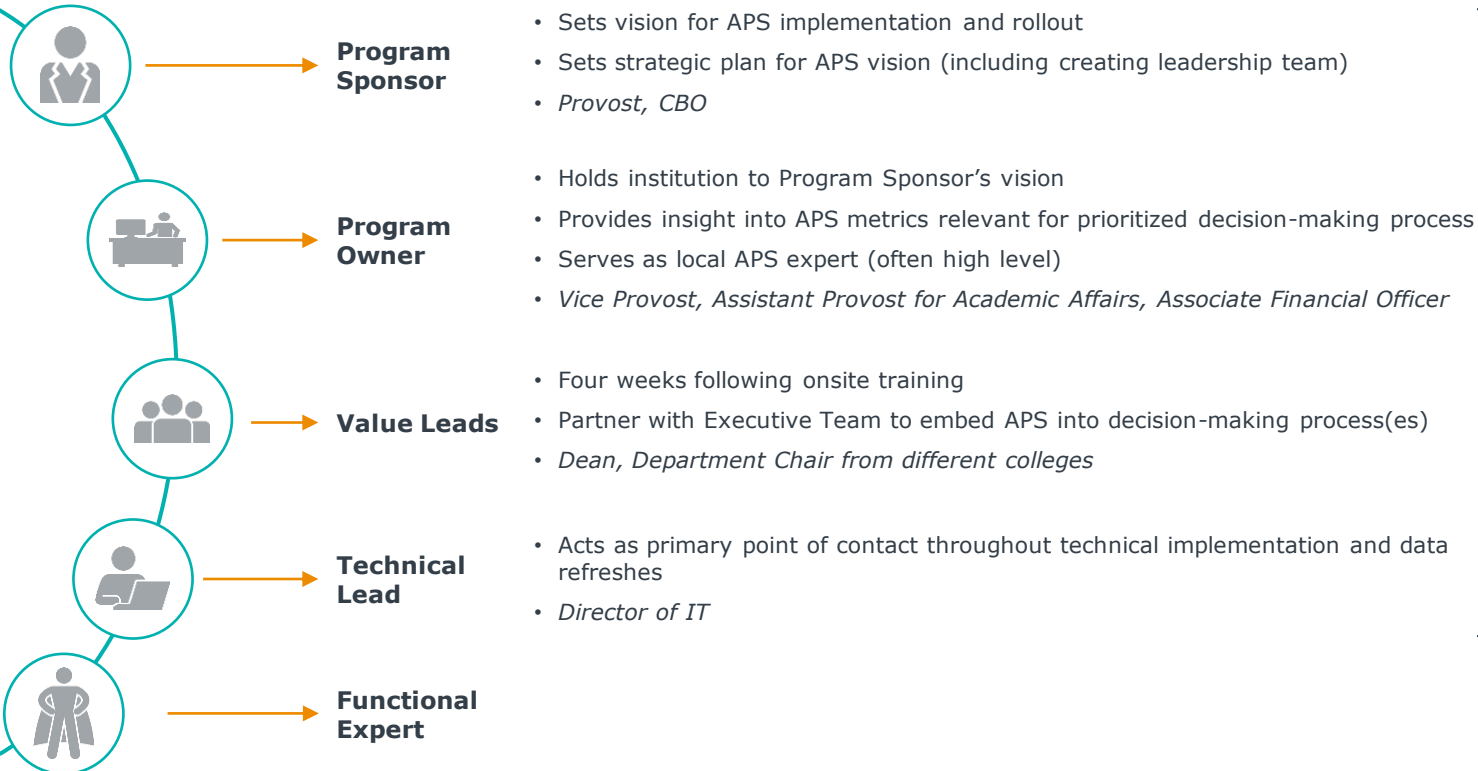


3 Levels of Support



Current APS Project Roles on Campus

Can All APS Project Roles Be Considered APS Experts?



There are two types of knowledge necessary to be an APS expert: **Conceptual and Functional.**

Redefining What it Means to Be an APS Expert

Conceptual vs. Functional APS Experts

Conceptual Expert

Role: Program Sponsor, Program Owner, Value Lead

- *Why did we buy APS?*
- *Why are we using APS?*
- *What are the expectations for APS?*
- *How do we want to embed APS into our process?*
- *Who will be the APS users?*
- *How should we introduce/roll out the platform?*

Functional Expert

Role: Functional Expert

- *What are the methodologies of the metrics in our APS process?*
- *What are the details of our FAQ document?*
- *What are the nuances of our data due to source systems?*
- *Do I have the understanding to take ownership of most internal questions that arise?*

- ✓ Everyone involved in the APS project must understand the goals and aspects of APS platform.
- ✓ Having local, comprehensive knowledge of APS data essential for **cultural buy-in**.
- ✓ It is difficult to get commitment from faculty and staff if they do not see same commitment and understanding from internal APS leadership team.

- **All** APS internal experts should have comprehensive understanding of APS.
- Functional Expert, a new type of Value Lead, takes a specific level of ownership.

Key Characteristics

Data Literate

- Able to consume data for knowledge
- Open to learning new technologies
- Understands implications of data source systems
- Can present data in understandable ways
- Understands why data is relevant for decision-making

Knowledgeable About APS

- Understands methodologies of APS metrics
- Has bandwidth to train on metrics and answer configuration questions
- Familiar with FAQ guide



Areas to Look on Campus

- Academic Affairs
- Assessment
- Institutional Effectiveness
- Institutional Research
- Academic Resources and Planning
- Finance



Roles


- Faculty Data Analyst
- Budget Analyst
- Senior Analyst

Worksheet

Name: _____
Institution: _____

Build an Infrastructure to Support Your APS Users

Three Components to Consider as You Create Support Resources

 **Identifying Potential APS Functional Experts on Your Campus**

List 3-4 individuals on your campus who can serve as an APS Functional Expert.


Areas to Look: Academic Affairs, Assessment, Institutional Effectiveness, Institutional Research, Academic Resources and Planning, Finance

Roles: Faculty Data Analyst, Budget Analyst, Senior Analyst

| | | |
|---|--|--|
| 1 | | Questions to Consider 1. Who do you reach out to for information on data? 2. Who could train users on campus to use software or interpret analytics for assessment? |
| 2 | | |
| 3 | | |
| 4 | | |


Who of the above do you believe has the bandwidth to take on the APS Functional Expert role?

| | | | |
|---|--|---|--|
| 1 | | 3 | |
| 2 | | 4 | |

 **Creating a Train the Trainer Project Plan**

Place an X next to the steps that your institution has completed.

- APS Leadership Team prioritizes APS process (Annual Health Check-Up, Faculty Line Request, Course Capacity Management)
- APS Leadership Team selects APS metrics for process
- Functional Expert identified
- APS Strategic Leader provides training/office hours for Functional Expert (the trainer)
- APS Strategic Leader helps trainer determine training session outline for users (dates, locations/Zoom links, attendees)
- APS Strategic Leader provides sample APS process templates to trainer

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Please take 5 minutes to complete the **Identifying Potential APS Functional Experts on Your Campus** portion of the worksheet. Download the worksheet using the link in the Chat.

We'll convene as a group for an opportunity to share out using either the "Raise Hand" or Chat feature.

Introducing the “Train the Trainer” Model

New Responsibility for Functional Expert

What is the “Train the Trainer?” Model

The APS Strategic Leader focuses on training internal functional experts on APS to **empower them with comprehensive knowledge to answer functional internal questions.**

Why Train the Trainer?

- ✓ Cultural Buy-In
- ✓ Internal Context
- ✓ Institution-Specific Data Questions

Tips to Facilitate a Smooth Train the Trainer Process



1 Prioritize Decision-Making Process

Program Owner clearly articulates prioritized process to all campus APS team (Annual Health Check, Faculty Line Request, Course Capacity Management, etc.)



2 Determine APS Metrics

APS metrics to be incorporated into determined process are decided upon by APS leadership team.



3 APS Strategic Leader to Train the Trainer

APS Strategic Leader to train the Functional Expert on prioritized metrics. Option for APS Strategic Leader to record this session and offer office hours session.



4 APS Strategic Leader to Support the Trainer

As new features are released, virtual refresh trainings offered by APS Strategic Leader on a yearly basis. Continuous access to APS Help & Training Tab, User Guide, Videos, etc.

Train the Trainer Process & Checklist

Training the Trainer

- 1 APS Leadership Team prioritizes APS Process (Annual Health Check, Faculty Line Request, Course Capacity Management)
- 2 APS Leadership Team determines APS Metrics for process
- 3 APS Functional Expert identified
- 4 APS Strategic Leader provides training/office hours to Functional Expert (the Trainer)
- 5 APS Strategic Leader helps Trainer determine training session outline for users (Dates, Locations/Zoom links, Attendees)
- 6 APS Strategic Leader provides sample APS Practice Worksheets and sample APS Process Templates to Trainer

Coming Soon!
*Sample Training
Worksheets and
Templates*

Resource: Training Preparation and Milestone Checklist

Download it using the link in the Chat!

APS Training Preparation and Milestone Checklist

Use the checklist to ensure your institution is prepared for APS trainings.

BEFORE TRAINING

Make sure the following exist at your institution:

- Clear university goals and expectations for APS platform use
- Defined user training milestones: pre-training activities, training topics based on user role and planning process being used
- Defined training session outline for user role being trained
- Overall roll-out and training timeline
- Training effectiveness assessment mechanism to collect user feedback
- Verify with APS Strategic Leader that all APS Users have access to platform
- Send confirmation of access and pre-learning activities to complete in the APS platform in advance of training activities, if applicable

When planning training, consider the following:

- Define training dates, locations, attendees
- Communicate with users about training times, coordinate attendance tracking
- Confirm users have access to the site
- Send confirmation of access and pre-learning activities to complete in the APS platform in advance of training activities, if applicable

DURING TRAINING

- Utilize training session outline to ensure that you thoughtfully cover all of the relevant analysis in the platform for each session
- Share university goals and expectations for APS platform use
- Share resources outlining where users can go with questions about the APS platform, data methodology, training support, and technical questions
- Share training assessment to ensure effectiveness

AFTER TRAINING

- Create opportunities for users to follow up to discuss questions, collect feedback, share updates with Training Team
- Review training assessment feedback and continue to review and improve training resources and approach based on feedback
- Communicate regularly with APS Strategic Leader and your institution's Executive Team about adoption, utilization, and ongoing user needs

Make a Training Plan
Work with your APS Strategic Leader

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Worksheet

Name: _____
Institution: _____

Build an Infrastructure to Support Your APS Users

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Roles: Faculty Data Analyst, Budget Analyst, Senior Analyst

1

2

3

4

Questions to Consider

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Who of the above do you believe has the bandwidth to take on the APS Functional Expert role?

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2

3

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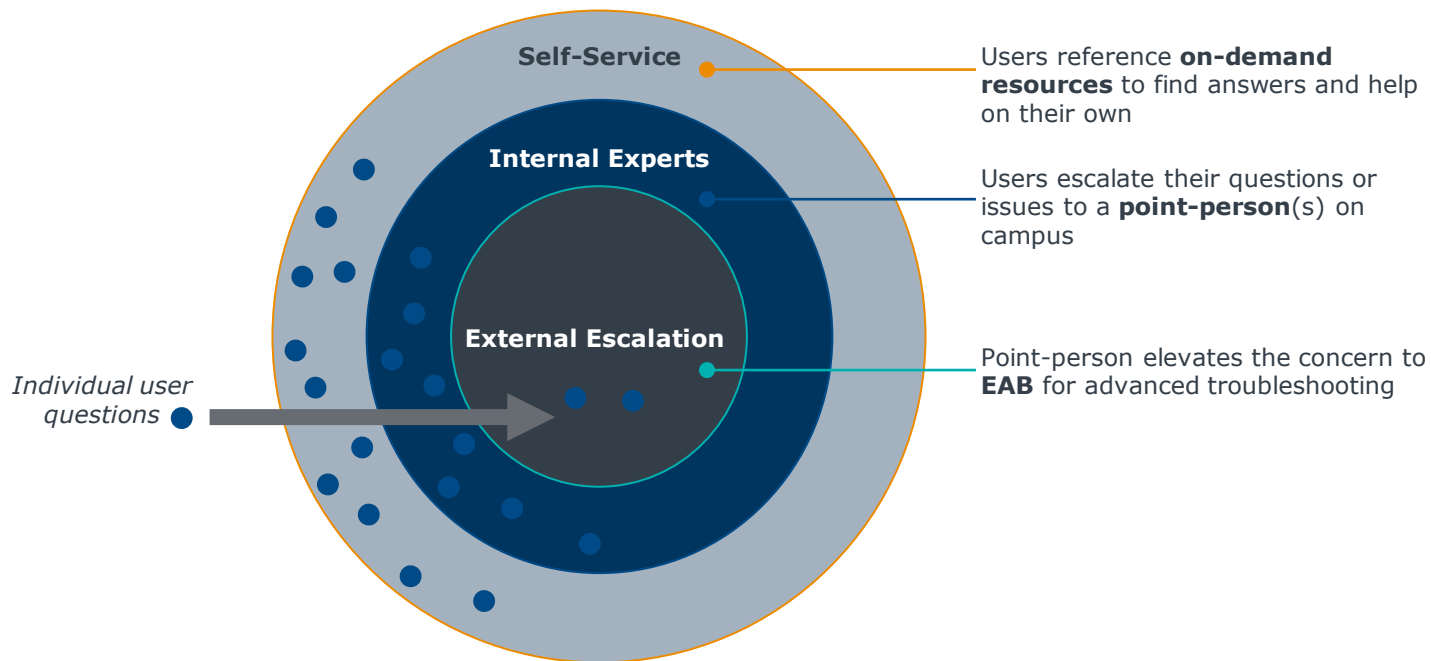
Please take 5 minutes to complete the **Creating a Train the Trainer Project Plan** portion of the worksheet. Download the worksheet using the link in the Chat.

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Creating Infrastructure to Support APS Users



3 Levels of Support



Supporting APS Expertise on Campus With Self-Service Resources

Creating an FAQ Guide Housed in Digital Hub

FAQ Guide

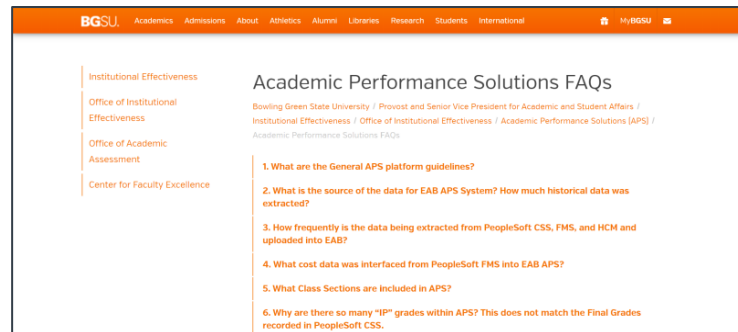
Functional Expert to work with APS Strategic Leader and Technical Leads to create institution-facing FAQ Guide after implementation.

Importance of the FAQ Guide

- Data Source Systems interact with APS differently, so we want guide to be institution-specific
- Gives academic leaders resources and on-demand assistance to help answer faculty & staff questions
- Demonstrates value in APS platform by leadership
- Arms internal leaders with resources to use APS effectively
- Helps newcomers become comfortable with APS more quickly

Tip: Ensure FAQ guide is easily accessible through a dynamic, login protected microsite on your institution's website.

Example:



The screenshot shows a web page for Bowling Green State University (BGSU) titled "Academic Performance Solutions FAQs". The page is part of a digital hub, as indicated by the navigation menu at the top which includes "Academics", "Admissions", "About", "Athletics", "Alumni", "Libraries", "Research", "Students", and "International". The page content includes a list of six frequently asked questions:

1. What are the General APS platform guidelines?
2. What is the source of the data for EAB APS System? How much historical data was extracted?
3. How frequently is the data being extracted from PeopleSoft CSS, FMS, and HCM and uploaded into EAB?
4. What cost data was interfaced from PeopleSoft FMS into EAB APS?
5. What Class Sections are included in APS?
6. Why are there so many "IP" grades within APS? This does not match the Final Grades recorded in PeopleSoft CSS.

Tips for a Healthier Data Ecosystem


> **Focus FAQ Guide On What is Unique**

Prioritize FAQs that are distinct to your institution. (If it's standard to the platform, we have user guides, videos, and a Help Center coming that will address these questions for you.)

> **Create a Central Email/Source to Receive Questions**

Use a centralized Internal APS question email address that the functional expert, program owner, and IT technical lead can use, so questions are tracked. If IT Help Desk already exists, IT desk can triage the email to the admin.

Worksheet



Developing an FAQ Guide and Online Central Resource Hub

Answer the corresponding questions listed below.

- 1

Do you have an FAQ Guide?

Yes No
- 2

If yes, have your users found the FAQ Guide sufficient?

Yes No
- 3

If not, what are three things your FAQ Guide needs to be more comprehensive for users?

 1.
 2.
 3.
- 4

Who will you partner with on campus (in addition to your APS Strategic Leader) to build or expand on the FAQ Guide?
- 5

Is your FAQ Guide located in an online central resource hub/microsite? Yes No
- 6

If not, who will you partner with on your campus to get the online resource hub/microsite up and running?

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Please take 5 minutes to complete the **Developing an FAQ Guide and Online Central Resource Hub** portion of the worksheet. Download the worksheet using the link in the Chat.

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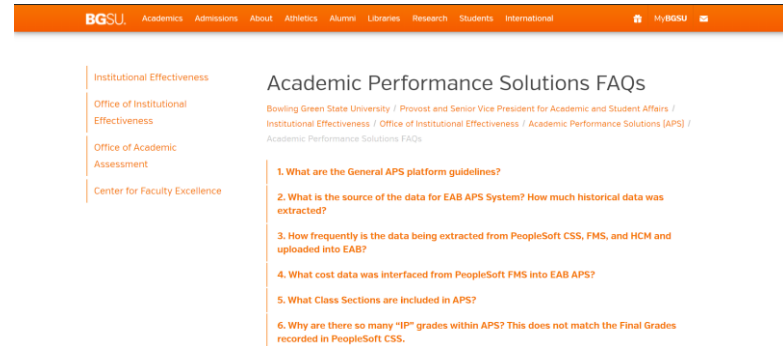
Appendix

Effective Methods for Communication & Training

| Active Training | Self-service Training | Proactive Training |
|--|--|---|
| <p>Platform Walk-Through: Conduct formal walk-throughs of APS. Ask department chairs, deans, and other main users to attend, follow along, and ask questions.</p> <p>Office Hours: Host informal times when deans and department chairs can come into a dedicated space (in-person or virtual) to help one another and ask questions.</p> <p>Note: Plan these training sessions ahead of time to establish a regular cadence; ensure you are targeting multiple audiences and platform components.</p> | <p>Resources in Help Center: EAB provides training guides that we recommend you pare down and/or customize to share with APS users. Ensure that these documents are digestible and easily accessible.</p> <p>Microsites: Institutional microsites are a great place to announce platform updates and store frequently-asked-questions</p> <p>Note: Ask your APS Strategic Leader for partner examples!</p> | <p>Onboarding/Hiring Training: Ensure that new APS users are acclimated to APS as soon as they join your institution.</p> <p>Persistent Training: Use department chair retreats, all-hands meetings, or roundtable discussions to share key functionality and success stories within APS.</p> <p>Note: Champion superusers to share wins by highlighting & rewarding their wins at existing meetings. Consider how APS can be part of ongoing conversations to better advising at your institution.</p> |

Microsites help to proactively address common questions *before they are asked*

- ▶ **Value Statement** – “Why are we partnering with EAB?”
- ▶ **Access Information** – “How do I log into the Training and Production environments?”
- ▶ **Resources** – “How does this feature work?”
- ▶ **Training Opportunities** – “How can I get in-person help?”
- ▶ **Product Release Updates** – “What’s coming next and how will it impact me?”



The screenshot shows a web page for Bowling Green State University (BGSU). The header is orange with the BGSU logo and navigation links: Academics, Admissions, About, Athletics, Alumni, Libraries, Research, Students, International. There is a search icon and the text 'BGSU' on the right. A left sidebar contains a list of links: Institutional Effectiveness, Office of Institutional Effectiveness, Office of Academic Assessment, and Center for Faculty Excellence. The main content area is titled 'Academic Performance Solutions FAQs' and includes a breadcrumb trail: 'Bowling Green State University / Provost and Senior Vice President for Academic and Student Affairs / Institutional Effectiveness / Office of Institutional Effectiveness / Academic Performance Solutions (APS) / Academic Performance Solutions FAQs'. Below the title is a numbered list of six questions related to the APS platform and data extraction.

Institutional Effectiveness

Academic Performance Solutions FAQs

Bowling Green State University / Provost and Senior Vice President for Academic and Student Affairs / Institutional Effectiveness / Office of Institutional Effectiveness / Academic Performance Solutions (APS) / Academic Performance Solutions FAQs

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Systems Supporting Quick and Effective Responses

What might an end user say?

“It doesn’t work!”



What could this really mean?

- User needs to set something up differently
- User needs training on its intended function
- User error
- Data is incorrect
- Product might have a bug
- User doesn’t like how something works

How do we know the right action step?

- Configuration Adjustment
- Permission Update
- Additional Training
- Technical Support
- Bug Escalation
- Enhancement Suggestion
- Strategic Leader Involvement