

# Needs Analysis

## ASSIGNMENT 2

Auckland University of Technology

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M Y O B

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T R A I N I N G P R O G R A M M E

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INFS603

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Needs Analysis & Acquisition

Bachelor of Computer and Information Sciences

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# Training Topic

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The training topic elaborates on grasping an understanding of the software system MYOB (Mind Your Own Business) in a very basic technical aspect, and in the aspect of using the Usability Interfaces for the MYOB platform in real company practice. MYOB is a leading accounting software provider, and it is the chosen platform for Silvera & Sons (Relf, C. n.d.).

## Training Aims

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The overall aim of the MYOB training programming is designed to:

- Assist a user in briefly understanding the basic technical concepts of how MYOB functions.
- Assist a user with MYOB usability interface operations.
- Provide the user with the most efficient and ideal MYOB practices, procedures, and techniques .
- Help a user in contacting help and support when required through a number of various communication methods.
- Increase maximum productivity by saving time and funds.
- Provide alternative/other training resources to users.
- Maintain technological business professionalism through MYOB.

## Learning Objectives

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At the end of the training programming, MYOB users should be able to understand how to use the MYOB software system functions they are specifically allocated to do (eg, the inventory and logistics controller does not need to learn how to use the MYOB payroll function).

From the perspective of a user, you (a user, depending on your work field) should be able to:

*(MYOB New Zealand Ltd, 2013)*

- Using financial control functions
  - Tracking financial information
  - Budgeting
  - Reviewing financial information
  - Auditing records
- Manipulating lists
  - Adding records
  - Using GST functions
  - Searching records
  - Changing records
  - Deleting records
- Manipulating transactions.
  - Finding transactions
  - Deleting transactions
  - Reversing transactions
  - Automating transactions
- Creating reports.
  - Producing reports
  - Editing reports
- Managing inventory
  - Creating items
  - Adjusting items in the inventory
  - Building items
  - Recording and seeing stocktake
- Reviewing inventory information
  - Initialising prices for items
  - Customising the inventory
- Manipulate bills.
  - Setting time billing preferences
  - Setting billing rates
  - Creating activities
  - Creating activity slips
  - Changing and reviewing activity slips
  - Creating time billing invoices
- Importing and exporting data
  - Importing data
  - Exporting data
- Manipulating sale functions
  - Saving customer information
  - Seeing sale information
  - Changing the type of sale/s
  - Receiving payments
  - Printing receipts

- Manipulating purchase functions
    - Saving supplier Information
    - Entering purchases
    - Searching purchases
    - Creating, deleting and editing a purchase order
  - Manipulating banking functions
    - Approving and using a bank feed
    - Recording all money that is spent and also received
  - Processing electronic payments
  - Transferring money between two accounts
  - Initialising a Company Profile
    - Creating and activating a full company profile
    - Initialising user accounts
    - Entering company balances
    - Initialising settings/preferences
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# Prerequisite/Existing Knowledge

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From previous documents for the company Silvera & Sons, we can gather information from company user characteristics:

## ► **Accountant/Director**

Taryn has been working for Silvera & Sons has a qualification of bachelors in an accounting degree in the highly honoured Auckland University of Technology University with a Master in Business and Administration. Taryn has had experience before using an accounting system and therefore will be a fast learner when it comes to using various banking, accounting and transaction functions of the MYOB software system (Barclay-Graham, Gomes, Gutla, Battistoni, 2016).

## ► **Information Technology Specialist**

Nicholas has had good experience with software and hardware, he has retired from the Army's Information Technology Department and has a deep knowledge of circuitry boards, building computers, and coding. He will pick up things right away and minimal training will be needed for him which therefore is a good advantage for any technical problems that may occur in the physical hardware or even software for the MYOB software system (Barclay-Graham, Gomes, Gutla, Battistoni, 2016).

## ► **Logistics Manager**

Sebastian is highly qualified and experienced. Minimal training is needed from him to grasp an understanding of how new systems work, and he will learn to use the stock/inventory/logistics related functionality related to the MYOB software system (Barclay-Graham, Gomes, Gutla, Battistoni, 2016).

## Link to Analysis of Training Needs

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The key reason for users to undergo the training programme is so that they can obtain an understanding as to what specific training programme users need to attend, and obviously to get an understanding of how to use the MYOB software system functions.

To maximise efficiency appropriately, users will be assigned to specific programmes of their field and various levels of training are applied based on the status of the users (managers - specialist, reception staff - basic/advanced, etcetera).

The training programme will also help identify weaknesses that may be yielding to users, and therefore more time will be emphasised on functions that staff are unfamiliar and/or cynical about.

All the MYOB software system users must take at least basic and advanced training for MYOB.

## Formative Assessment

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A formative assessment is to monitor user learning and provide constant feedback to programme conductors/teachers to help improve overall learning, help users to identify strengths and weaknesses of work, help programme conductors/teachers to find out where users may struggle the most and to overcome/provide solutions to problems when required (Carnegie Mellon University, n.d.).

The training programme includes a formative assessment at the end of each short course (a week at maximum), and it will let conductors/teachers

analyse whether to conduct more teaching sessions based on the MYOB functionality assessment results that users in the programme will undergo.

The formative assessment will ensure that the learning tasks conducted are cumulatively building towards the achievements of the outcomes/goals.

## Summative Assessment

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A summative assessment evaluates user learning at the desired times of the training program through practical MYOB functionality examinations, and examination marks are compared with a standard that is created by the MYOB developers/assessors (Carnegie Mellon University, n.d.).

Summative assessments will be held in the middle and end of the training programmes.

Results based off the summative assessment will determine whether the training programme has effectively impacted the users, or whether supplementary training is needed for the user/s.



# Training Content & Delivery Programme

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The training programme will be held for two weeks and all training will be classroom training. The training week will begin on Sunday (10 hours a day) and end on Friday. There will be a Formative Assessment (FA) at the end of the first week, and another Formative Assessment (FA) and Summative Assessment (SA) at the end of the second week.

## **1. Introduction**

1.1. Introduction to the MYOB software system

## **2. Basic (MYOB New Zealand Ltd, n.d.)**

2.1. Overview

2.2. Initial Set Up

2.2.1. Introduction and set up of the MYOB software system for the company, a company profile

2.3. Daily Processes

2.3.1. Creating Quotes, orders and invoices for customers

2.3.2. Processing payments from customers

2.3.3. Recording monetary transactions that are received and spent

2.3.4. Preparing and printing bank deposits

2.4. Accounting Introductory

2.4.1. Understanding basic concepts of accounting

2.4.2. Reading balance sheets

2.4.3. Coding transactions to appropriate and desired accounts

2.4.4. Understanding how to use GST functions

## **3. Advanced (MYOB New Zealand Ltd, n.d.)**

3.1. Beyond the Basics

3.1.1. Setting up user accounts/profiles so unique access is required for various levels of authentication.

- 3.1.2. Tracking data using jobs and categories for better information management
- 3.1.3.Us
- 3.1.4.Using automated processes to speed up entry of data
- 3.1.5.Using the to do list
- 3.1.6.Handling overpayments and unusual transactions
- 3.1.7.Troubleshooting and resolve difficult transactions
- 3.1.8.Recording customer information
- 3.1.9.Using mail functions to automate emails to customers
- 3.2.Business Reporting and Analysis
  - 3.2.1.Learning to analyse the business from previous reports
  - 3.2.2.Initialising Key Performance Indicators (KPIs) and assistance with excel
  - 3.2.3.Using MYOB templates for reports and Microsoft Excel to customise templates
  - 3.2.4.Inputing MYOB data in order to measure business performance
  - 3.2.5.Improving and using cashflow and profit functions

#### **4. Specialist (MYOB New Zealand Ltd, n.d.)**

- 4.1.Payroll Management
  - 4.1.1.Initialising payroll
  - 4.1.2.Initialising departments
  - 4.1.3.Initialising employees
  - 4.1.4.Initialising salaries
  - 4.1.5.Initialising employee leave and holidays
  - 4.1.6.Processing monthly pays
  - 4.1.7.Terminating no longer employees
  - 4.1.8.Producing reports for the New Zealand Inland Revenue Department
  - 4.1.9.Printing management reports
- 4.2. Inventory Management
  - 4.2.1.Understand the difference in the types of inventory

- 4.2.2.Creating and inventory item
- 4.2.3.Ordering stock
- 4.2.4.Purchasing stock
- 4.2.5.Selling stock
- 4.2.6.Performing a stocktake of the inventory
- 4.2.7.Adjusting inventory
- 4.2.8.Check availability of stock
- 4.2.9.Producing inventory reports

Week 1	Sun	Mon	Tue	Wed	Thu	Fri
8am	1	2.1	2.1	2.2	2.3	2.4
9am						
10am						
11am						
12pm						
1pm						FA
2pm						
3pm						
4pm						
5pm						

Week 2	Sun	Mon	Tue	Wed	Thu	Fri
7am						
8am	3.1	3.2	3.3	4.1	4.2	FA
9am						
10am						
11am						
12pm						
1pm						SA
2pm						
3pm						
4pm						
5pm						

# Training Plan

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## **Basic**

The Basic programme is intended to all beginners company staff in order for them to learn the best way possible to set up the company file, use the MYOB system software for basic day to day processing, and grasp an understanding of basic accounting and book keeping concepts.

## **Advanced**

The Advanced programme requires completion on the Basic programmes and teaches how to perform regular and periodic reconciliation functions to MYOB, giving a much more in depth understanding or the reporting capabilities on the software system. All company staff are required to take the Advanced programmes after the completion of the Basic programme.

## **Specialist**

The final Specialist programme of the entire training programmes requires completion of the Advanced programme, and this programme mainly focuses on how to keep track of stock and inventory which is geared toward the users involved in logistics.

All training programmes are done in the sequence provided in the time table above, and all programmes are inclusive of a formative assessment and summative assessment..

# Interactivity & Feedback Methods

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## **Interactivity**

Interaction and is a major factor that important in many aspects of the training programme/s, interaction includes communication between the training programme conductor/teacher and the MYOB users. There are various ways for the MYOB user to interact with the training programmer conductor/teacher but the most ideal feedback methods are mentioned, and they include interaction through Email, Skype, Surveys and Questionnaires, and a personal One on One interview in person.

## **Feedback Methods**

### ▶ Email

- ▶ Emails are a great, simple, and anonymous way of getting feedback from the MYOB users. It is most likely the most accurate method in terms of response retrieval and ability to have time to describe situations or elaborate events.

### ▶ Skype

- ▶ Skype face time is a great way to interact as it is the best live communication method after real life face to face communication. Skype is particularly excellent when people can not be at the same place at once, it allows virtual meetings and/or training interviews to take place.

### ▶ Survey/Questionnaire

- ▶ Surveys/questionnaires allow for the training programme conductor/teacher to write specific statements or questions before hand that users can either answer from their own experience in words or rate a particular training session/module/function in terms of what they found

well with the MYOB training programme/s, what was difficult, what functionality should be covered again, and what the confidence rating of skill would be, etcetera.

- ▶ Feedback Interview

- ▶ A one on one interview session in person with the training programme conductor/teacher, this is likely to be the most personal and 'intimate' method of communication that lets the user communicate effectively through emotions and allows users to physically describe and show what problems they may encounter or methods that may improve efficiency of training for other users.

## Pedagogy

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Pedagogy is the knowledge and art of education and instructional theory. In the entire training programme course for the MYOB software system, the practice of instructional design is outlined in divers ways (Boundless. n.d.):

- ▶ Entire Training Programme Organised Schedule

The entire training programme is held for only two weeks that consist of six days a week at ten hours a day. This is scheduled so that training can be completed as soon as possible and be put into effect in the company by users, and also the fact that concentrating for two weeks on the training programme/s will let the users fully grasp the nature of using the MYOB software system

- ▶ Entire Training Programme Plan

The whole training programme plan is organised with user programme allocation (example, all members do the Basic and the Advanced programme, but only the the users related to logistics undergo the

specialist programme). This ensures minimal time wastage for users that do not require to know certain functions that they are not necessary.

► Interactivity

Training programmes consist of periods that are ten hours a day, these long periods will let users have the time to express their doubt, misunderstandings, and confidence that they may have regarding the MYOB software system functions.

► Feedback

Feedback ensures that the training programme conductor/teacher are teaching in a way that makes the users understand to their maximum potential, and the option of users providing that feedback lets the training programming conductor/teacher changes their methods of training in a way that is more convenient to users, or spend extra or less time on certain functionalities of the MYOB software system that needs more attention and explanation, or less time on an easy and familiar functionality of the software system.

## Moderation

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In order to moderate the MYOB training programme, the company users will peer review the training programme plan, and the actual outcome of training will be compared with the training programme plan to see whether it is being followed, it will be reviewed periodically at the end of each training programme modules. If discrepancies are identified shall be discussed and resolved amongst the company staff (Roque, Shao, Gutla, Morpeth, 2015).



# Evaluation of the Training

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A training evaluation will be completed by users at the end of the basic training programme, advanced training programme, and specialist training programme, this will help the training programme conductor/teacher to get a better understanding of how the programmes were run, and what could potentially be improved on for next time. Below is a survey:

Questions	Example Answers
Training programme undertaken?	<i>Basic training programme</i>
Name of conductor/teacher?	<i>John Smith</i>
How did you find the training?	<i>Frustrating and fast paced</i>
Were the training materials helpful?	<i>Somewhat but more needed</i>
Did the programme meet your expectations?	<i>I was expecting a more thorough teaching on MYOB software system</i>
What did you like about the programme?	<i>Teacher was clear and professional, well organised</i>
What did you dislike about the programme?	<i>Things went too fast, I could not keep up with content being taught</i>
Should some content in this programme be covered again? (If so state what parts)	<i>Yes, the entire programme, maybe spread it out over two days instead of one (feels congested)</i>
Are there any changes that you would recommend make the program better?	<i>Spread the program over a time period of two days instead of just one day.</i>
On a scale of 1 - 10 (10 being the highest), how confident are you on what you were taught in this programme?	3
On a scale of 1 - 10 (10 being the highest), how difficult did you find this course?	9
Any comments?	<i>As mentioned, content should be taught slower. Will email further.</i>

# Other Resources Available to Learners

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There are various resources available for the MYOB software system training, and most of them are found online.

## **Webinars, training courses, videos, community forums, support notes, and guides:**

<http://myob.com.au/business/customer-service-support/end-of-financial-year-support/training-and-resources-1257832599998>

## **Online tutorials**

<http://www.officelinklearning.com.au/training-resources/>

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