**Training and onboarding**

**Overview**

Training and onboarding process is placed to make sure the newly hired resources is fully aware of the processes followed at HiQuSystems, including, code of conduct, development, deployment, coding standards, and last but not the least, business domain knowledge of Nexelus product.

The training plan is spread over eight weeks. The plan is devised in a way that any new resource is self sufficient to understand the processes and basic business domain knowledge of the product. However, the training of the product does not stop here. It’s a constant learning process and individual is responsible to spend at least 4 hours a week to practice and learn new/advance features of the product. It is manager’s responsibility to make sure that resource spend that much time on the product for at least initial 6 months.

The resource is evaluated every week and gaps and issues are revised, discussed and new targets are set.

At the completion of one month, the resources again evaluated and critical points and issues are highlighted.

After two months of training the resource is evaluated and again gaps/critical points are discussed. If the resource has made good progress the new goals are set by the manager for another month.

If the resource lacks on domain knowledge, then critical points are talked about and resource is tasked to repeat the product domain session and spend extra time to understand the missing links.

**Training plan**

Week 1

1. Client Services Protocol
2. Client Items Email
3. JIRA maintenance
4. Basic Nexelus Overview

Week 2

1. Rackspace Protocol
2. Client Services Protocol
3. Client Items Email
4. JIRA maintenance
5. Nexelus Work breakdown Structure
6. SQL Tutorial

Week 3

1. Client Items Email - Primary Resource
2. Shared ownership of JIRA for Client Items
3. SQL Learning – TSQL
4. SQL Trace
5. Nexelus Level2/Level3 Tables
6. SQL Tutorial

Week 4

1. Client Items Email - Primary Resource
2. Shared ownership of JIRA for Client Items
3. Troubleshooting (basic overview)
4. SQL Learning – TSQL
5. Databases (basic overview)
6. Crystal Report basic overview
7. SQL Trace
8. Nexelus Level2/Level3 Tables
9. Timesheet

Week 5

1. Client Items Email - Primary Resource
2. Shared ownership of JIRA for Client Items
3. Troubleshooting (basic overview)
4. SQL Learning – TSQL
5. Crystal Report basic overview
6. SQL Trace
7. Nexelus Level2/Level3 Tables
8. Timesheet, rates
9. Expense Reports

Week 6

1. Client Items Email - Primary Resource
2. Shared ownership of JIRA for Client Items
3. Troubleshooting (basic overview)
4. SQL Learning – TSQL
5. Crystal Report basic overview
6. SQL Trace
7. Nexelus Level2/Level3 Tables
8. Timesheet, rates, approvals
9. Expense Reports, exp groups, Approvals
10. AMEX Integration Process

Week 7

1. Client Items Email - Primary Resource
2. Shared ownership of JIRA for Client Items
3. Troubleshooting (basic Items and differentiation between product related items and Report related items)
4. SQL Learning – TSQL
5. Client Deployments/Upgrade (basic overview)
6. Crystal Report advanced overview
7. SQL Trace
8. Web Deployments (basic overview)
9. Nexelus Level2/Level3 Tables
10. Timesheet, rates, approvals
11. Expense Reports, exp groups, Approvals
12. AMEX Integration Process

Week 8

1. Client Items Email - Primary Resource
2. Shared ownership of JIRA for Client Items
3. Troubleshooting (basic Items and differentiation between product related items and Report related items)
4. SQL Learning – TSQL
5. Client Deployments/Upgrade (basic overview)
6. Crystal Report advanced overview
7. SQL Trace
8. Web Deployments (advanced overview)
9. Nexelus Level2/Level3 Tables
10. Timesheet, rates, approvals
11. Expense Reports, exp groups, Approvals
12. AMEX Integration Process

Product (Nexelus) training plan

Week 1

Day 1

1. HR related items
2. Introduction to teams
3. Computer access

Day 2

1. Typical Client (ad agency business overview)
2. Nexelus power point presentation (Company Presentation)
3. Demo of the Software

Day 3 & 4

1. Base tables Review (explain each with the business concepts)
2. Show user interface for those base tables
3. Provide access to a test system

Day 5

1. Self Study

Week 2

Day 1

1. Review progress and retention from Previous week
2. Be able to explain any of the base table
3. Be able to show the UI for specific base table
4. Be able to explain the ""business"" logic behind the base table

Day 2

By this time user should be able to use SQL trace to trace calls and is across the company and group rules concept

1. Review Level2/Level3 (WBS)
2. Provide examples - should understand the logic behind Job/Activity Structure

Day 3, 4 & 5

Self Study

1. Understand the relationship between base tables and Level2/Level3 tables
2. Understand the concept about templates
3. Understand how rules affect certain fields (rate tables, Org units, etc.)

Day 5

1. Self Study

Week 3

Day 1

Review progress

1. Rules as it related to Level2, dependency, etc.
2. Provide clear guidance on what the employee will be tested on level2/level3

Day 2

1. Time Sheet Review along with TE table

Day 3

1. Time Sheet Approval
2. Upload & Post"

Day 4 & 5

1. Self Study (Association of fields, Rates and Rules)

Week 4

Day 1

1. Review of Time Sheet
2. Be able to explain flow of Time Sheet
3. Be able to explain Approval criteria

Day 2

1. Expense Report Review with tables
   1. Non CC
   2. CC
   3. Expense Report Items
   4. Rules related to Exp Reports
   5. Payment Types

Day 3

1. Expense Approval Process
2. Upload & Post

Day 4 & 5

1. Self Study (Association of fields, custom fields, Rules and voucher)

Week 5

Day 1

1. Review of Expense Report
2. Be able to explain flow of Expense Report
3. Be able to explain Approval criteria

Day 2

1. Estimate Budget (Types of budget)
2. Overview of Budget templates
3. Overview of regular budget"

Day 3, 4 & 5

1. Self Study of budget along with associated fields & rules

Week 6

Day 1

1. Review of budget section
2. Be able to explain Labor, Expense and Resource budget
3. Be able to explain how rates, tasks, expense types and work function are populated

Day 2

1. Overview of PO and Voucher (Po based and Non PO based voucher)
2. PO Tolerance
3. Self Study

Day 3 & 4

1. Self Study of PO along with fields, rules, linking with Level2/Level3 and budget

Day 4 & 5

1. Self Study of voucher along with fields, rules and linking with PO

Week 7

Day 1

1. Review of PO
2. Review of Voucher

Day 2

1. Overview of Billing & Invoicing
   1. Estimated
   2. Scheduled
   3. Actual
2. Self Study of Billing

Day 3 & 4

1. Self Study of Billing

Day 5

1. Self Study of Job Inquiry, How and when data is populated on this screen

Week 8

Day 1

1. Review of Billing & Invoicing

Day 2

1. Review of Billing & Invoicing
2. Review of Job inquiry (Detail of each section)

Day 3, 4 & 5

1. Review of complete process flow

**Post training plan**

Upon completion of the product training, the resource must be able to participate in product discussion, be able to reproduce test scenario and fix basic level issues.

In third month, the resource must be able learn and demonstrate the product process flow described below:

**Product Process Flow**

1. Go To Job Setup screen
2. Select the client "BERLICLOR"
3. "ZZBILLABLE" template – this is a generic one, additional templates can be defined
4. Save The Job- BERLICOR-13-XXX (not down the job number – copy it)
5. Go to Job resource Management Screen and load the same job
6. Update the data as required on Job resource management screen, Click on Create Revision estimate and update it as required
   1. This is just a sample for RM, without workflow/project plan. Reference Levin’s initiative vs. what we are doing with Chicago initiative
7. Click on the "view estimate" that will redirect to the Job Estimate
8. Enter Time and OOP (billable client)  estimate as per requirement, check the checkboxes on each relevant activity and approve from the grid header icon
9. See defaults loaded for Expense and Studio, this can be based on the template for different type of jobs
10. Now we have estimates, print estimate format, this can be customized
11. From reports – Operational, run the "Estimate Vs. Actual Summary"  for the job ( I suggest copy the Job after the step 3 above)
    1. Drill down to show the Details
12. Go to Job inquiry and show the summary and drill down from there as well
13. On to the billing, “Estimated Billing”
    1. Paste or select the Job, select “Est…” transaction types for each of the drop down for Time, Expenses and Resources
    2. Hit refresh, and perhaps show that each live can be manipulated
    3. Hit refresh again, and use the percent to perhaps bill 25%
    4. Click on Save and Generate Invoice, this should generate the invoice
14. Go To Invoice screen, click search, your invoice should be at the top.
15. Click on the load icon (next to check box on the line) to load the invoice
16. You can click on the drop down to show various different formats
17. Leave the default one as is and click on print and then print as final and then click on post
18. Now go to Job Inquiry and show data
19. Go to Reports  User Reports and print WIP summary for this Job. This ties to the GL
20. Go to Reports  Operational and run the Job status detail report this will show you data in a different format, this also shows the granularity of data
21. Now to the PO Entry
22. Go to PO screen, select vendor i.e.,1Tripo, select  your job
23. Enter PO Amount by selecting the available item in the drop down, save
24. Approve PO, and print it to make it final and active. Note down the PO number (copy it)
25. You can show Job inquiry and Job Status Detail report to show the PO in there as well
26. Now we have PREBILL out and POs issued, let’s assign resources
    1. Create a new revision as this one will be locked since we pushed that version to the estimate/budget. Label it something like “Staffing”
    2. And assign the resources, let’s use Fellows and Jimenez  and few others (as I had used these two in the morning today)
27. Click on the "Assign Resources" and enter data to the selected resource, save
    1. When coming back to the main UI, click on lock revision – this will pin the timesheet line
       1. Switch to one of the assigned resource,
       2. Show the  Workflow gadget
       3. And show the timesheet line (**remember** to go the week that person is scheduled for)
       4. Switch back to yourself
28. GO TO Resource Assignment by Employee (Daily Book), Press search
    1. You can over book people from here as well
    2. You can then show the excel pivot and other burn rate reports that we discussing to address all RM related questions.
29. Now enter some vouchers
    1. Go to Voucher Entry Screen (Under Data Entry), click the new button
    2. In the PO search UP Paste/Select PO000xxx,
    3. Enter Invoice number
    4. Save
    5. Attached a document as a sample (you can show it how it is available in the Job Inquiry as well)
30. Go to the menu click on POST vouchers, hit search, scroll down and your voucher should be the last one, move to the right and post
31. Now you can go to the following to show data
    1. WIP Summary
    2. Job Inquiry
    3. Job Status Detail
    4. Estimate vs. Actual Summary
32. Let’s transfer some time to mimic that we have time entered
33. From under Billing  Posted Transactions
    1. Look up Job “SCRU0113”, click Search
    2. Expand Time panel
    3. And select 3-4 transactions and click on “Transfer” button, select your newly created Job and activity TIME and hit transfer
34. Now let’s do the reconciliation invoice, go to the Generate Invoice Screen (under Billing)
    1. Click on the check box to indicate “apply Pre bill”
    2. Select or paste you job code in From and to boxes for the Job
    3. Generate Invoice
       1. This will generate a reconciliation invoice
       2. Go to the invoice UI and click on Search your invoice should be at the top
       3. Load it, and change the format to cid:image001.png@01CEF279.719248E0, save and print to show this format
       4. Then Select cid:image002.png@01CEF279.719248E0, save and print to show another format.
       5. Print as final and then post
35. Now you should go to the following to show the current status
    1. Job Inquiry
    2. Estimate vs. Actual Summary (click to drill down)
    3. Job Status Detail
    4. WIP Summary
36. Then you can print the generic utilization report and talk about the same that we had discussed.