Training Plan for:

I3 Voicemail Upgrade to Campus

Document Version: 1.0

Date: 5/22/09
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1 Document Management

This document has been compiled with input from the contributors listed in section 1.1. Please note the version control in section 1.2 and use the document version number in communications so that all parties are aware of and working with the latest document.

1.1 Contributors

Training project contributors

<table>
<thead>
<tr>
<th>Role</th>
<th>Department</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>ITS-LPD</td>
<td>Steve Sorden</td>
</tr>
<tr>
<td>Contributor</td>
<td>Telecomm</td>
<td>Dave Russell</td>
</tr>
<tr>
<td>Contributor</td>
<td>Telecomm</td>
<td>Rose Lopez</td>
</tr>
<tr>
<td>Contributor</td>
<td>Telecomm</td>
<td>Bernice Frost</td>
</tr>
<tr>
<td>Contributor</td>
<td>Solution Center</td>
<td>Wendy Garrison</td>
</tr>
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</table>

1.2 Version Control

Please document all changes made to this document since initial distribution.

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Author</th>
<th>Section</th>
<th>Amendment</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/18/09</td>
<td>0.5</td>
<td>Steve Sorden</td>
<td>All</td>
<td>Unapproved draft presented for review</td>
</tr>
<tr>
<td>5/22/09</td>
<td>1.0</td>
<td>Steve Sorden</td>
<td>All</td>
<td>Official document</td>
</tr>
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</table>
2 Needs Analysis

2.1 Background

A quick training needs analysis was conducted through interviews of the contributors listed in section 1.1. All are stakeholders in the project. The project is to upgrade the current Octel voicemail system with a system known as Communité which is supported by I3, or Interactive Intelligence Inc. (http://www.inin.com). We purchased the Enterprise Messaging package and the project vendor or value added re-seller (VAR) is Altivon.

The plan is to go live with the new system on the evening of June 15. At that time, users will access the new voicemail system when they access their voicemail. Existing voicemail messages will not be transferred onto the new system. Users will be able to access their old voicemail messages by dialling into the old system using a new number (523-0133). The old voicemail access number of 523-6225 will be transferred to the new voicemail system.

2.2 Findings

After interviewing all of the stakeholders, it appears that the upgrade has been well-planned and that other than the issue of voicemail not transferring, project risk should be minimal. Documentation provided by the vendor also appears to be sufficient. There will be some disruption when some users discover that have lost their greetings and voicemail and steps should be taken to make sure that this risk is minimized.

Some of the key points gathered during the training interview include:

- The access number right now is 523-2500, but they will change it to the current number of 523-6225 before GoLive.
- The current URL of the telephone page is http://www4.nau.edu/its/tel.
- The voicemail URL is http://www4.nau.edu/its/tel/voicmail/voicemail.asp
- There is a web interface that all users will be able to access to listen to their voicemail.
- Users may be able to purchase a license for Unified Communications and another for Fax in the future.
- Dave will email me the communication plan, help files, and other materials by Monday, May 18.
- There is an official video that explains the enterprise messaging system. We probably shouldn’t publish it right now because it also shows the unified messaging system which isn’t standard, but has to be purchased for $25. It is still a good resource for us though. (http://www.inin.com/ProductSolutions/Pages/Demo-MIC.aspx).
- We’ll put the training materials and quick references up on our site and they will link to it from their main site.
2.3 Recommendations

Based on the initial training needs interviews, the following recommendations have been suggested and should be pursued further in discussions.

- Users will still have access to the old voicemail system and will be able to access their old voicemails using a number other than 3-6225. We should think about leaving this system up into the fall (November?) so that returning professors have at least a few weeks to get their old messages.
- We might create an alias for the voicemail URL: http://www4.nau.edu/its/tel/voicemail/voicemail.asp, something like www.nau.edu/voicemail
- SolCen might create a phone tree to direct voicemail calls to the Telecomm side. For example: 1 for voicemail, 2 for everything else.
- Can we sync the web interface with NAU user ID and password? This will allow users to retrieve their voicemail in an emergency, even if they have forgotten their phone password.
- We need to have a firm set of instructions on how to save your voicemail off of the old system.
- One low-tech solution that has been proposed for saving voicemails is to have loaner tape recorders. Maybe we can develop a practical windows/mac method using a microphone. The microphone will be placed next to the telephone earpiece.
- We might investigate sending out a blanket voicemail message announcing the switchover.
- Information on the switchover should be posted on the ITS website in the featured items section.

3 ROLLOUT

3.1 Rollout Strategy

Please include details of the rollout strategy, which could include the following:

- The upgrade will occur on the evening of June 15.
- Old voicemail will remain on the old system for a period to be determined. Users can access this voicemail by dialling an access number.
- Dave Russell will continue to notify users of the change according to the communication plan.
- They are looking for Unified Messaging pilot testers. Ryan Thompson has volunteered and LPD will test a second line as a team line. This will allow users to be supported, assisted, and trained in the LPD Open Lab and by LPD team members as a backup to Telecomm if needed.
- The vendor is modifying a quick reference to reflect the NAU set up. Dave should have it by May 15.
- On June 16th & 17th, Rose and Bernice will offer temporary helpdesk support for walk-ins in the front of their building.
- Telecomm is planning to train the Solution Center. LPD team members will likely attend as well.
• Vendor training (VAR) by Altivon of approximately half an hour will be provided once in the morning and once in the afternoon on June 15 for the Solution Center and LPD team members.

3.2 Communication

Some efforts have already been made to communicate the Voicemail upgrade with the campus. For example, Dave has published information in Inside NAU on 4/29/09 at http://www4.nau.edu/insidenau/bumps/2009/4_29_09/voicemail.htm

Figure 1 shows the official communication project plan provided by Dave Russell:

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Responsible</th>
<th>Measure Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Inside NAU article to build general awareness</td>
<td>2 days</td>
<td>Tue 4/20/09</td>
<td>Wed 4/20/09</td>
<td>David Russell</td>
<td></td>
</tr>
<tr>
<td>Agree on go-live date; June 15</td>
<td>1 day</td>
<td>Fri 5/8/09</td>
<td>Fri 5/8/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Telecomm Voicemail site with OUI reference guide/instructions</td>
<td>5 days</td>
<td>Thu 5/14/09</td>
<td>Tue 5/28/09</td>
<td>Ralph Spesse</td>
<td></td>
</tr>
<tr>
<td>Obtain reference guide from Altivon (modified for campus)</td>
<td>2 days</td>
<td>Thu 5/14/09</td>
<td>Fri 5/15/09</td>
<td>Ralph Spesse</td>
<td></td>
</tr>
<tr>
<td>Have reference guide posted by web development team</td>
<td>7 days</td>
<td>Mon 5/11/09</td>
<td>Tue 5/12/09</td>
<td>Web Dev Team</td>
<td></td>
</tr>
<tr>
<td>Investigate internally developed training material (video of VUI)</td>
<td>1 day</td>
<td>Fri 5/15/09</td>
<td>Fri 5/15/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meet with Steve Sorden</td>
<td>1 day</td>
<td>Fri 5/15/09</td>
<td>Fri 5/15/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ask department contacts to check existing greeting for those away on leave</td>
<td>6 days</td>
<td>Tue 6/2/09</td>
<td>Fri 6/12/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email department contacts requesting they check for special greetings</td>
<td>1 day</td>
<td>Tue 6/2/09</td>
<td>Tue 6/2/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respond to department contacts for new greetings with special greetings</td>
<td>4 days</td>
<td>Thu 6/4/09</td>
<td>Fri 6/12/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reset password default for new greetings with modified special greetings</td>
<td>5 days</td>
<td>Mon 6/8/09</td>
<td>Mon 6/15/09</td>
<td>Mary Ford</td>
<td></td>
</tr>
<tr>
<td>Second Inside NAU article to be published 6/10 with final reminder</td>
<td>2 days</td>
<td>Thu 6/4/09</td>
<td>Fri 6/5/09</td>
<td></td>
<td></td>
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<tr>
<td>Draft article for Inside NAU</td>
<td>2 days</td>
<td>Thu 6/4/09</td>
<td>Fri 6/5/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit article to Inside NAU</td>
<td>1 day</td>
<td>Fri 6/5/09</td>
<td>Fri 6/5/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email specific instructions to all Voicemail subscribers</td>
<td>8 days</td>
<td>Mon 6/8/09</td>
<td>Wed 6/10/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email to Facility with email (individual addresses) with instructions</td>
<td>8 days</td>
<td>Mon 6/8/09</td>
<td>Wed 6/10/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email all Staff with email with instructions</td>
<td>8 days</td>
<td>Mon 6/8/09</td>
<td>Wed 6/10/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicate to Distance Learning staff via OLS</td>
<td>3 days</td>
<td>Mon 6/8/09</td>
<td>Wed 6/10/09</td>
<td></td>
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<tr>
<td>Broadcast voicemail on all systems to all users regarding VUI deliver</td>
<td>1 day</td>
<td>Mon 6/8/09</td>
<td>Mon 6/8/09</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solutions Center Training, two 1-hour sessions</td>
<td>1 day</td>
<td>Mon 6/8/09</td>
<td>Mon 6/8/09</td>
<td>Altiven</td>
<td></td>
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<tr>
<td>Online training</td>
<td>1 day</td>
<td>Mon 6/8/09</td>
<td>Mon 6/8/09</td>
<td></td>
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<tr>
<td>Develop and distribute KTS conference room using 922-7474</td>
<td>2 days</td>
<td>Tue 6/9/09</td>
<td>Wed 6/10/09</td>
<td>Altiven/Paige Brincke</td>
<td></td>
</tr>
</tbody>
</table>

Figure 1

3.3 Technical Issues

From the perspective of the training plan, there are no major technical issues other than possibly training users how to record their voicemail messages off of the old system.

4 TRAINING

4.1 Delivery

Training will be provided by the Telecomm team with backup support from the LPD Open Lab if desired. Ryan Thompson of the LPD team has been assigned to this project to work with the Telecomm team and assist them when asked.

• All documentation and training will be delivered from a single page in the Learning & Professional Development web site. Telecomm will link to it from their Web site. This page will host all end user documentation and can be updated by the Telecomm team and supported by LPD.
• On June 16\textsuperscript{th} & 17\textsuperscript{th}, Rose and Bernice will offer temporary helpdesk support for walk-ins in the front of their building
• The Open Lab will be on standby to provide phone assistance or one on one assistance to end users as needed.
• LPD has agreed to create a training video on how to use the Web interface for end users.

4.2 Training Materials

• Information/training/documentation page in the LPD web site that is a central resource for all end user voicemail needs
• LPD will produce a training video on how to use the Web interface for end users.
• Document on "setting up your new NAU voicemail box"
• Comprehensive User Guide (94 pages)
• Quick Reference Card
• Quick Reference for Menus
• LPD-produced guide that explains the I3 system and the OCS system and how they interact.