



Advantage 2.0 Financial System

(AFS)

Computer Based Training Guide

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INTRODUCTION

What Is CBT?

CBT stands for Computer Based Training. CBT is a computer program that simulates and allows the user to duplicate many of the functions of the ISIS Financial System (AFS).

AFS CBT courses have been designed to:

- Demonstrate selected AFS transactions, documents or procedures.
- Walk you through specific examples.
- Allow you to process information as if you were using the production system.
- Display helpful hints regarding the transaction, procedure, document or use of the system.

CBTs allow you to:

- Practice on the system without worrying you'll "break" something or get stuck.
- Access training information prior to obtaining a AFS user ID.
- Begin classroom training on the same level as your fellow students, if you are new to the system.
- Take the courses as many times as you wish.
- Take the courses at your office.
- Take the courses as slowly as you wish or as fast as you can.
- Take the courses when it is convenient for you (morning, afternoon, etc.)
- Strengthen your system knowledge. These courses can be re-taken if you forget the steps in a function or you would like to brush up on how to process a document.

Who Should Take CBTs?

Current users who would like to review some of the AFS functionality as well as new users who have not attended any training classes should take them.

CURRICULUM

The following is a list of computer based courses available to potential AFS users:

<u>Course Title</u>	<u>Short Name</u>	<u>Estimated Time to Take Course</u>
* Introduction and Navigation	NAVI	2 hours
* Document Processing	DOC	2 hours
General Accounting	GEN	2 hours
Grant Processing/Administration Projects	GRANTS	1 hour
Payment Processing	PAY	2 hours
Revenue	REV	2 hours

- * **These CBT courses must be completed if you plan to attend any AFS instructor led class(es).**

Employees **must be registered** for a CBT course in order to gain access into the course. Registrations are handled by the agency Training coordinator submitting a request to the OIS training staff. Personnel numbers are being used as the student's ID number. If additional student course registrations are needed, contact your agency's ISIS Training Coordinator.

Descriptions, purposes and objectives are available to you in the actual CBT courses. A course contains several units, each of which has one or more purposes or objectives.

CBT SIGN ON

1st Time Sign On to CBT

Follow these instructions the first time you sign on to Phoenix, our AFS CBT software.

1. At the DOA screen, type **CBT**, and press <ENTER>.

If you do not have access to the DOA screen, contact your agency liaison or AFS training contact for instructions on what logon must be used to reach this screen.

2. At the PHOENIX sign on screen, type your **personnel number** (without the P or leading zeros), and press the <TAB> key.
3. Type **NAVI** in the **Enter Course Name field**, and press <ENTER> (*PASSWORDS are not being used*).

NOTE: If you receive the message at the top of the screen "RE-ENTER SIGN-ON ID", you may have mistyped your Personnel number. Type your Personnel number again and press <ENTER>. If you receive the message again, you may not be registered for the course. Call the OIS Training section at (225) 342-2677.

4. The Welcome to Introduction to AFS screen will appear. Read the info and press <ENTER>.
5. Another introduction screen will be displayed. Read the information and press <ENTER>.
6. Type your **FIRST and LAST name** on this screen, and press <ENTER>.

Use upper/lower case and any punctuation you feel necessary. For example: If your name is Bob Robert, Jr., you would type it Bob Robert, Jr. and press the <ENTER> key. The system will not accept just a first or just a last name.

7. Type **Y** if your name is correct and press <ENTER>.

If your name is incorrect, type **N** and press <ENTER>. Reenter your name, press <ENTER>, and respond appropriately to the system's request for verification.

```

                                INTRODUCTION TO ISIS/AFS
UNIT   TRIES                TITLE
=====
A     0                HOW TO TAKE THIS COURSE
B       0                OVERVIEW OF ISIS AND AFS
C       0                ACCOUNTING FUNCTIONS
D       0                ACCESSING THE SYSTEM
E       0                TABLES, DOCS, AND LEDGERS
F       0                TABLE NAVIGATION

===== 03/02/98 == 5:54 PM =====
SELECT A UNIT ABOVE OR CHOOSE AN OPTION BELOW:
  1  Select a unit                    4  See your performance record
  2  See a unit description
  3  Exit
->

```

8. Type **A** and press <ENTER> on the Introduction to ISIS/AFS Course screen shown above.

Read the information and press <ENTER>.

9. From this screen you view the unit's objectives or go directly into the unit. This unit will teach you how to take the remainder of the CBT courses and units. It will also teach you how to view the unit descriptions and/or objectives.

10. Continue to press <ENTER> to move from screen to screen. As you progress through the unit, make notes, or print screens (if you feel it's helpful).
11. If you respond incorrectly to a question while taking a unit, a prompt will be displayed to help you make the right selection.

For example, on one of the first screens you are instructed to type either Y or N to see additional CBT functionality (you should type **Y**, and press <ENTER>). If you don't enter Y or N but just press <ENTER>, the following is displayed:

Please answer this question by typing Y or N. Please try again.

12. Continue to read and follow screen instructions. Remember, movement from screen to screen is accomplished by pressing <ENTER>.
13. If you haven't finished the unit and you wish to exit the unit and/or course, follow the instructions listed in the CBT unit or go to page 11 for additional instructions.
14. The last screen in this unit will be the Summary screen. Press <ENTER> to continue to the Unit A Results screen.

```
How to Take CBT
=====
                          Summary

You now should be familiar with the workings of CBT.  In this
unit we covered:

    *   How to select a Unit/Objective
    *   How to sign on/off from the CBT
    *   Basic keyboard skills and keys you need to take the CBT
    *   How to answer questions

Keep in mind, that the key to moving around in the screens
and menus is to read the screens and menus carefully and follow
the directions and you will not go wrong!

Ready to start?  Press <ENTER> to return to the Unit List
and select Unit B, Overview of ISIS/AFS, to begin.

          |-----|
          | ENJOY! |
          |-----|

=====
->          OPTIONS F12          ID a01a  ITEM 60
```

15. The Unit A Results screen will be displayed. This screen will display your weighted score.
NOTE: re-taking one section of the unit will not affect your score.
Press <ENTER> when you are finished with the Unit A Results screen.
16. You will be returned to the Course Unit screen. Once you have completed Unit A, an asterisk (*) will be displayed in the Unit column beside the A and the Tries will equal 1.
17. You may continue taking additional units or you may exit the course (sign off CBT).

If you wish to continue taking additional courses, type the next **unit letter**, and press <ENTER>. Continue reading the screens, answering the questions, and taking additional units as outlined in steps 8 - 16 above.

If you wish to exit the course, type **3** (Exit) and press <ENTER>. You will be returned to the PHOENIX screen. Press the key you use to clear your 3270 (mainframe) screen, to complete the sign off (This could be the <CLEAR>, the "+" key or the PAUSE key. If you are not sure which key to use, contact your data processing section).

18. When you have completed all units in the Introduction/Navigation course, your unit column will have asterisks beside every unit letter.

Continue to take the units until you have an asterisk beside every unit letter on the Course Unit screen.

19. You may re-take the units, if you wish. See page 10 for additional instructions.
20. Once you have completed the Introduction/Navigation course, you will take the Document Processing course. Exit the Introduction/Navigation course (from the Course Unit screen, type **3**, and press <ENTER>) and then follow the additional instructions on pages 7 and 8.
21. If you wish to sign off CBT from the PHOENIX screen, press the key you use to clear your 3270 (mainframe) screen, to complete the sign off (This could be the <CLEAR>, the "+" key or the PAUSE key. If you are not sure which key to use, contact your data processing section).

Exiting a Unit Prior to Completion

Use these procedures if you are in the middle of a unit and you must exit CBT as soon as possible. You will have the option to "save" your place in the unit so you don't have to start at the beginning of the unit. If you saved (or bookmarked) your place in the unit, when you sign on again for the course and choose option 2, the system will return you to the screen after the screen you exited on. If you do not save your place, you will be returned to the Course Unit screen.

1. Press the <F12> key if you are taking a unit and must exit the CBT. A menu will be displayed at the bottom of the screen.
2. Press the <F12> key again. An A or B selection will be displayed at the bottom of the screen.
 - ▶ Type **A**, and press <ENTER> if you wish to save your place in the unit. The following message will be displayed:

STUDENT WILL RESTART AT THE NEXT ITEM PLEASE PRESS ENTER ->

Press <ENTER>. You will be returned to the PHOENIX screen.

OR

- ▶ Type **B**, and press <ENTER> if you do not wish to save your place in the unit (**all scoring information will be deleted!**). The Course Units will be displayed.

Type **3**, and press <ENTER>. You will be returned to the PHOENIX screen.*

3. Press the key you use to clear your 3270 (mainframe) screen, to sign off CBT (This could be the <CLEAR>, the "+" key or the PAUSE key. If you are not sure which key to use, contact your data processing section).
4. See page 8 for additional information on how to sign on and access an incomplete unit.

NOTE: You must answer any question on your current screen before exiting.

- * If you use this option, you will need to take the course starting at the beginning. For additional information, see page 10.

1st Time Sign On to Additional CBT Courses

Follow these instructions when you first sign on to courses other than Introduction/Navigation (i.e., Document Processing, Revenue, Payments, Grants, General Accounting, Inventory).

1. At the DOA screen, type **CBT** and press <ENTER>.

If you do not have access to the DOA screen, contact your agency liaison or AFS training contact for instructions on what logon must be used to reach this screen.

2. At the PHOENIX sign on screen, type your **Personnel number** (without the P or leading zeros), and press <TAB>.
3. Type one of the following course short names in the **Enter Course Name field**, and press <ENTER>.

PASSWORDS are not being used.

DOC	Document Processing
GEN	General Accounting
GRANTS	Grant Processing/Administration Projects
PAY	Payment Processing
REV	Revenue

NOTE: You must take the Introduction and Navigation course first and Document Processing second. There is no exception to this!

4. An introduction screen(s) will be displayed. Press <ENTER>.
5. Type your **FIRST and LAST name** and press <ENTER>.

Use upper/lower case and any punctuation you feel necessary. For example: If your name is Bob Robert, Jr., you would type it Bob Robert, Jr. and press the <ENTER> key. The system will not accept just a first or just a last name.

6. Type **Y** if your name is correct and press <ENTER>.

If your name is incorrect, type **N** and press <ENTER>. Reenter your name, press <ENTER> and respond appropriately to the system's request for verification.

7. Type **A** and press <ENTER> to select the first unit of this course on the Course Unit screen.
8. Continue to press <ENTER> to move from screen to screen. Follow the screen instructions and respond to any questions.
9. If you wish to exit in the middle of a unit, press F12 and follow the instructions on page 6.
10. The last screens will be the Summary and the Unit Results screen.

Press <ENTER> to return to the Course Unit screen.

11. From the Course Unit screen, you may select additional units (type the unit letter and press <ENTER>) or you may sign off CBT (type **3** and press <ENTER>).

Accessing an Incomplete Unit

Use the following procedures if you wish to take a course you previously exited and "saved" (or bookmarked). If you save your place when you exit (procedure outlined on page 6), you don't have to start at the beginning of the unit.

1. At the DOA screen, type **CBT**, and press <ENTER>.

If you do not have access to the DOA screen, contact your agency liaison or AFS training contact for instructions on what logon must be used to reach this screen.

2. At the PHOENIX sign on screen, type **your Personnel number** (without the P or leading zeros), and press the <TAB> key.
3. Type the short course name you used previously in the **Enter Course Name field**, and press <ENTER>.

DOC	Document Processing
GEN	General Accounting
GRANTS	Grant Processing/Administration Projects
PAY	Payment Processing
REV	Revenue

4. The Computer Assisted Instruction screen will be displayed. You may select one of the following numbers at the bottom of the screen and press <ENTER>:
 - 1 This option will exit the course and display the PHOENIX screen. Select this option if you want to save your original place, but logoff CBT. When you are ready to take the CBT again, begin at the top of this page.
 - 2 This option will take you to the page **after** the page you were on when you exited the system.

For example, if you exited CBT while on page 6, and you selected option 2, page 7 of the CBT would be displayed.

- 3 This option will display the Course Unit screen. If this option is selected, you will be returned to the beginning of the unit, you will lose your place in the unit, and **all of your scoring information will be deleted**. See page 8, step 7 for additional information or follow the screen instructions.

Re-Take a Course

Follow these instructions if you wish to re-take a course and/or selected course units as a refresher for any reason.

1. At the DOA screen, type **CBT**, and press <ENTER>.

If you do not have access to the DOA screen, contact your agency liaison or AFS training contact for instructions on what logon must be used to reach this screen.

2. At the PHOENIX sign on screen, type your **Personnel number** (without the P or leading zeros) and press the <TAB> key.
3. Type the short course name you used previously in the **Enter Course Name field**, and press <ENTER>.

DOC	Document Processing
GEN	General Accounting
GRANTS	Grant Processing/Administration Projects
PAY	Payment Processing
REV	Revenue

4. Press <ENTER> on the Usage Summary screen.
5. Select a unit letter from the Course Unit screen and press <ENTER>.

In the Unit column, an asterisk (*) indicates that you have completed a unit. The next column is the Tries column. You may take the units and the courses as many times as you wish.

6. You will be on a screen which will list the unit objective(s). The menu at the bottom of the screen will display a number of choices. Select one of the options and continue with your CBT processing.

CBT SIGN OFF

Exiting a Course

If you have finished a unit and are ready to sign off CBT, you will be at the Course Unit screen.

```

                                INTRODUCTION TO ISIS/AFS
UNIT   TRIES                TITLE
=====
A*     1                    HOW TO TAKE THIS COURSE
B*     1                    OVERVIEW OF ISIS AND AFS
C*     2                    ACCOUNTING FUNCTIONS
D*     1                    ACCESSING THE SYSTEM
E      1                    TABLES, DOCS, AND LEDGERS
F      0                    TABLE NAVIGATION

===== 04/02/98 == 11:11 AM =====
SELECT A UNIT ABOVE OR CHOOSE AN OPTION BELOW:
    1  Select a unit                4  See your performance record
    2  See a unit description
    3  Exit
->

```

Select **3**, and press <ENTER>. You will be returned to the PHOENIX screen. Press the key you use to clear your 3270 (mainframe) screen, to complete the sign off (This could be the <CLEAR>, the "+" key or the PAUSE key. If you are not sure which key to use, contact your data processing section).

IF YOU ARE LOCKED-UP

1. Try pressing <ENTER>, the F12 key, the <TAB> key or typing SIGN OFF or "12" next to the arrow and press <ENTER>.
2. If you can't get "unstuck" by reading the helpful hints or menus, call your agency liaison.
3. If your agency liaison isn't available, please contact the OIS Training section at (225) 342-2677.
4. After 10-30 minutes of inactivity, your session will be automatically be terminated (the Division's mainframe will drop your session after 30 minutes; depending on your connection, your session may be terminated sooner).

HELPFUL HINTS

- Schedule your CBT courses during a quiet time if possible. Concentrate on the information presented on the screen.
- Take your time and carefully read the information displayed on the screens. The pattern of CBT is to display new information and allow you to absorb this new data. Don't worry about how fast you should be going; learn at your own pace.
- Be particularly attentive when new processes are demonstrated. You may be required later to repeat the steps on your own to confirm you can perform the function.
- Take the courses and/or units as often as you wish.
- Try not to take more than one new CBT course a day. Give yourself time to absorb the information.
- Take a course when you are most alert. Are you a morning or an afternoon person?
- Make sure you are comfortable with the basic features and concepts presented in the courses. The classroom training will not necessarily duplicate information presented in the CBT.
- Pay close attention to each Course Unit screen. Completed units will have an asterisk (*) displayed in the Unit column to the right of the unit letter. An asterisk must be displayed for all course units if you wish to attend the corresponding instructor led class.
- If you can't gain access to a CBT course that you thought you were enrolled in, check with your agency AFS training coordinator and/or ISIS Liaison to verify that you should be taking the course.

FREQUENTLY ASKED QUESTIONS

A student is unable to sign on, what's wrong?

If the student is on the PHOENIX screen, look at the Enter Sign On ID field. Is it labeled Re-Enter Sign On ID? If so, the student may be typing an incorrect format (typing the personnel number with P or leading zeros) or a Personnel number the system does not recognize.

Solution: If the student is typing his/her social security number correctly, contact the OIS Training section at (225) 342-2677.

If the student is on the PHOENIX screen, and the Enter Course Name field is labeled Re-Enter Course Name, the student may be typing an incorrect course abbreviation.

Solution: Correct the course name, and press <ENTER>.

What courses am I supposed to take?

Students registering for AFS instructor-led courses on the AFS Training Request Form will automatically be registered also for the related CBT courses. If you wish to take only a CBT course, possibly as a refresher, contact the OIS Training team at (225) 342-2677.

At what times can the CBT courses be accessed?

If you have a direct connection to the DOA mainframe, the mainframe is available from 6:30 AM - 8:00 PM on weekdays, 8:00 AM - 5:00 PM Saturdays and holidays, 8:00 AM - 4:00 PM Sundays, unless otherwise notified.

If you do not have a direct connection to the DOA mainframe, your hours may be different. Please check with your data processing area.

How many times can a student take a CBT course?

At this time, there is no limit on the number of times.

Can I take some units or courses over without affecting my grade?

Yes. You can exit the unit before the end of the unit or re-take one section at a time, to avoid affecting a grade already received.

What does that weighted score on the Unit Results screen indicate?

The score is a way for you to check your results for the unit. Another way for you to verify a completion is to look at the Course Unit screen.

UNIT	TRIES	TITLE
		INTRODUCTION TO ISIS/AFS

```

=====
A*      1      HOW TO TAKE THIS COURSE
B*      1      OVERVIEW OF ISIS AND AFS
C*      2      ACCOUNTING FUNCTIONS
D*      1      ACCESSING THE SYSTEM
E       1      TABLES, DOCS, AND LEDGERS
F       0      TABLE NAVIGATION

===== 03/02/98 == 11:11 AM =====
SELECT A UNIT ABOVE OR CHOOSE AN OPTION BELOW:
    1  Select a unit
    2  See a unit description
    3  Exit
    4  See your performance record
->

```

Units with asterisks (*) next to them have been completed (Units A, B, C, and D). Find the Tries column. Unit E has not been completed; Unit F hasn't been taken yet.

I took an objective over, why didn't I get a unit score?

The system will only display a unit score if you re-take the complete unit. Your score will reflect the last time you took the course, not an average of scores.

Can a student use another student's social security number to take a CBT course?

No. Each student must be registered under his/her own personnel number. If a student cannot sign on with their personnel number, contact the OIS Training section at (225) 342-2677.

After I take Introduction/Navigation, what course(s) do I take next?

You should take the Document Processing course next. After those two courses, you may take the other courses in any order you wish.

You may not be registered for all courses. Check with your agency liaison or AFS training coordinator for a course list.