

Stage 1: Determining which roles perform specific duties for the program being implemented.

1	Topic	Planning Section Team Member Needing Training (Y/N)					Design Section Team Member Needing Training (Y/N)			Water Conservation
		Chief Engineer	Office Support Specialists	Utilities Permitting Technicians	Engineering Technicians	Engineers	Drafters	GIS Analyst	Engineers	Conservation
3	Looking up existing services for an address	Y	Y	Y	Y	Y	Y		Y	Y
4	Looking for a range of addresses along a street		Y	Y	Y	Y	Y		Y	Y
5	Identifying active meter services in a given area, or along a given street, or streets.		Y	Y	Y	Y	Y		Y	Y
6	What services are provided?	Y	Y	Y	Y	Y	Y		Y	Y
7	What is the status of each service?	Y	Y	Y	Y	Y	Y		Y	Y
8	Size of services?	Y	Y	Y	Y	Y	Y		Y	Y
9	Is a meter installed? What is its serial number?	Y	Y	Y	Y	Y	Y		Y	Y
10	Where is the meter box located?	Y	Y	Y	Y	Y	Y		Y	Y
11	Distance and direction to water main meter is connected to, water main size & type.			Y	Y	Y	Y		Y	
12	What is the service line material and size?	Y	Y	Y	Y	Y	Y		Y	Y
13	How is a water well reflected in MSS?	Y	Y	Y	Y	Y	Y		Y	Y
14	Review location remarks.	Y	Y	Y	Y	Y	Y		Y	Y
15	Review water service history.	Y	Y	Y	Y	Y	Y		Y	Y
16	Review device information	Y	Y	Y	Y	Y	Y		Y	Y
17	Lookup codes (shift F1)	Y	Y	Y	Y	Y	Y		Y	Y
18	Navigate forwards and backwards (pause break) through menu screens	Y	Y	Y	Y	Y	Y		Y	Y
19	Determine account history (date started, date finalized).	Y	Y	Y	Y	Y	Y		Y	Y
20	Lookup name and address on account, billing/usage history (CCF vs gallons)	Y	Y	Y	Y	Y	Y		Y	Y
21	Generate residential and commercial MSS service orders (developer / city installed fire mains, hydrants, domestic meters, potable lawn meters, reclaimed lawn meters, backflow prevention devices, and meter relocations)			Y						
22	Being able to bill appropriate annual readiness to serve fees for multiple firelines at a location			Y						
23	Being able to move and reclassify meters			Y						
24	Being able to charge meter reinstall fee or other misc. charges			Y						
25	Starting water bills			Y						
26	Modifying account information for an address			Y						
27	Performing swaps			Y						
28	Setting up portable meter billing			Y						
29	Setting up connection fee financing billing			Y						
30	How to handle protectus meters			Y						
31	Generating reports	Y	Y	Y	Y					Y
32	Determining locations with abandoned accounts that have meters that need to be pulled			Y						
33	Reviewing and updating meter inventory			Y						
34	How to identify/handle reclaimed T10 meters	Y	Y	Y	Y	Y	Y		Y	Y
35	Setup an account			Y						
36	Look Up and Review Charging Information for Account Service Calls			Y						Y
37	Search and Access Active and Prior Account Information by Acct #, Svc Address, Name, Loc #			Y						Y
38	Access Billing History to include line item charges			Y						Y
39	Access Detailed Bills			Y						Y
40	Access Pending Bill			Y						Y
41	Access Current and Prior Bill Images			Y						Y
42	Access Customer Information			Y						Y

Stage 2: Correlate the data gathered from the first stage of the analysis and group together the duties to form modules that present the information required to teach those procedures. The resulting training modules are then presented again to the client to conduct part two of the analysis. Based on the roles determined previously, the client has to determine which modules would be required for each to be prepared to perform their duties utilizing the new system.

ROLES & DEPARTMENTS -->	WATER										
MODULES	CALL CTR	BILLING	COLLECTIONS	REACTIVE/PM	MANAGEMENT	METER READING	PLANNER/SCH	Work Order Tech	SERVICE RESPONSE	HIGH BILL	CONSERV/LAB
Introduction and Navigating CU											
Persons, Account and Relationships											
Locations and Services											
Initiating New Services											
Add Meters/Assets to Inventory											
Move-Ins											
Meter Reading											
Billing											
Introduction to Collections Tampa											
Payments											
Move-Outs											
Service Orders Creation/Resolution											
Solid Waste Portal											
Scale House Portal											
Solid Waste Assets											
Mobile Application											
Comments, History, Tasks/Issues, and Alerts											

Stage 3: Based on the results from Stage 2 of the analysis a Curriculum is developed.

MODULES	TOPICS	PRE-REQUISITES	Duration +1 hr for exercises/questions	# of sessions in one day	Number of People per Course	# of classes: 18 per session	# of Days per Module	Customer Facing	Finance	Technical
Cayenta Utilities Overview	0101 Introduction to Cayenta Utilities	Basic Computer Skills	3.5	2	332	18	9	X	X	X
	0102 CIS Inquiry									
Fundamentals I	0201 Persons, Accounts and Relationships	Cayenta Utilities Overview	3.5	2	165	9	5	X		X
	0202 Locations and Services									
Fundamentals II	0301 Alerts	Fundamentals I	5	1	332	18	18	X	X	X
	0302 Basic Bill Inquiry									
	0303 Landlord Auto Connect Agreement									
	0304 Documenting Comments Call Log									
	0305 Tips and Tricks									
Payments/Cashiering	0401 Entering and Querying Payments	Cayenta Utilities Overview	6	1	95		5	X	X	
	0402 Reverse and Repost Current Payments									
	0403 Reverse and Repost Previous Payments									
	0404 Balance Transfers									
	0405 Managing Payments									
Service Orders/Dispatching	0501 Service Order Console	Cayenta Utilities Overview	4.5	2	287	16	8	X		X
	0502 Closing Service Orders Examples									
	0503 Dispatching/Mass Scheduling									
	0504 Console - Closing and Cancelling Service Orders									
Financials	0601 AR an Overview	Cayenta Utilities Overview	2.5	4	116	6	2	X		
	0602 AR Upload and AR Suspense									
	0603 Managing AR Groups									
Meters/Meter Reading	0701 Managing Meter Inventory	Cayenta Utilities Overview	3.5	2	75	4	2			X
	0702 Meter Reading Management									
	0703 Mass Meter Exchanges									
	0704 Routes and Cycles - Resequencing Routes									
	0705 Meter Testing									
CSR I	0801 Introduction to Collections	Fundamentals I	4.5	2	94	5	3	X		
	0802 Returned Payments NSF									
	0803 Set Pay Arrangements									
CSR II	0901 AR Headers	Fundamentals I	2	4	94	5	1.5	X		
	0902 Creating Refunds									
Move ins /Move outs	1001 Move-ins	Fundamentals II	5	1	94	5	5	X		X
	1002 Initiating New Services									
	1003 Creating Service Order Examples									
	1004 Bill and Tax Codes									
Billing I (Basic)	1101 Introduction to Billing	Move Ins /Move Outs	4.5	2	116	6	3	X	X	
	1102 Budget Billing									
	1103 Installment Billing									
	1105 Linked Meters Setup									
	1106 BOD and TSS Surcharges									
Billing II (Exceptions)	1201 Move in/out Advanced Scenarios and Errors	Billing I	4.5	2	116	6	3	X	X	
	1202 Cancel Rebill Processing									
	1203 Correcting Bills									
	1204 Handling Hi-Lo Exceptions									
	1205 Entering and Adjusting Reads									
	1206 Managing Your Unbilled Account									
Billing III (Miscellaneous)	1301 AR Adjustments	Billing I	4.5	2	116	6	3	X	X	
	1302 Cycle Billing Management									
	1303 Bankruptcies									
	1304 Write offs									
	1305 Winter Average Billing									
		TOTAL	53.5		TOTAL	104	44			