RMS Attachment 8 - Training Plan Niche Response

Note: This RMS Attachment 8, Training Plan provides the response provided as part of the Contractor's technical proposal for the New York State Police Records Management System project used as the benchmark to establish this Aggregate Agreement. The Contractor, Niche Technology Inc, and the Products offered under this Aggregate Agreement are required to adhere to the functionality contained in this response. An Authorized User should review the functionality described by the Contractor in this Attachment and should use this information as a baseline for the Statement of Work. Authorized Users should also determine if any changes are necessary to meet the specific project requirements when working with the Contractor to develop the Authorized User Agreement. Please see Attachment D, How to Use the Aggregate Agreement 18-02, for additional information when working with the Contractor to develop the Authorized User Agreement.

Contractor's Name: Niche Technology Inc.

Requirement Type – Training

Instructions:

- For each requirement contained within this document a response is required.
- If additional space is needed the Contractor should clearly label their response with the requirement identifier.
- NYS reserves the right to allow the Contractor to correct obvious errors of omission.

The Records Management System will be a mission critical system used daily by the New York State Police. NYSP training will be especially challenging given the number of personnel, the diversity of the geographic locations and the need for a permanent 24/7/365 training environment.

The assumptions that shall be utilized to prepare training options and costs are as follows:

Note: Facilities for training will be provided by NYS. All Contractor led training will be in Albany, NY

A. Given a statewide location of users and the diversity of skill sets requiring training, NYSP expects a wide variety of flexible training for all user roles including, but not limited to, the following:
   1. Self-study Introduction to RMS (PowerPoint or video presentation)
   2. Instructor Lead Hands-On Training (Including all equipment and interfaces necessary to perform the training)
      a. Self-study web-based training
      b. Self-study tutorials

B. Training courses will be developed for:
   1. Train-the-trainers
   2. End users (role based)
   3. Business Administrators
   3. System Administrators

C. Contractor led Training will consist of:
   1. Training for up to 50 Train-the-Trainers (T3s)
   1. Training for Business Administrators

2. Training for System Administrators

Rqmt. No.	Requirement Description	Offered	Not Offered
	The Contractor shall check the appropriate box as part of its response to indicate the availability of the following:		
TR1	a) Contractor instructors are experienced trainers that have extensive knowledge of their RMS solution;	☒	☐
	b) Contractor personnel are available onsite for a limited number of end user training sessions to assist NYS T3s in fine tuning their training sessions and assist in the early stages of training; the schedule, location and duration characteristics shall be determined during the development of the detailed implementation plan but will be based on the data provided in response to this RFQ;	☒	☐
	c) A permanent 24/7/365 training environment is provided	☒	☐
	d) Assistance in creating the data to be used during training sessions based on NYSP input;	☒	☐
	e) Contractor provides formal training, if requested, when an approved software upgrade is installed which modifies any of the functionality of the RMS;	☒	☐
	f) Any and all training materials developed for the RMS project shall become the exclusive property of NYS with all rights to modify, copy and distribute;	☒	☐
	g) Training materials will be provided in electronic format that can be updated by NYS;	☒	☐
	h) NYS shall retain final approval authority for all training content.	☒	☐

Rqmt. No.	Requirement Description
TR2	The Contractor shall provide a training plan and training content which includes but is not limited to all requirements defined herein. Include with your plan the equipment requirements, best practices, considerations, constraints and limitations.
	Niche Technology response: see our response material immediately following this table.

Training options

Niche Technology provides standard training to police project team members, in support of the overall NicheRMS project. We provide knowledge transfer for the police project team at the beginning of the project and then continuously over the life of the project.

Customer training team

Before beginning training activities, you, as a customer, must identify training team members for your project. These are team members from your organization who will be involved in developing training materials and providing training. By involving your own training team members in the development of training materials, you ensure that the training will incorporate your own specific business processes, and that the training material will support how you want your users to perform their jobs.

Every customer has its own processes and job functions, formed and framed by their legacy IT systems and their capabilities. Over the course of the implementation project, your project team will make decisions on how jobs will change and what jobs will look like with a new NicheRMS. The reasoning for these decisions are important to pass onto the training team so that they can sell the new application to agency personnel and get buy-in during the training. Niche will not have this insight or provide the weight to the end user training.

Benefits of this approach include:

- Customers develop their own in-house NicheRMS expertise.
- Training material can be made job-specific, based on the project team's decisions.
- Agency trainers can deliver the training where and when it is needed, including providing yearly refresher training or training for new staff members.
- Customers can modify and supplement Niche training materials to suit their needs.
- The training is repeatable.

Training material

The Niche project team works closely with customer project team trainers to assist in developing agency-specific end-user training materials. This is done after the Business Process Fit/Gap portion of the implementation project, which defines customer business processes.

Niche provides standard end user training material, base material for training material development and sample training material from other Niche projects. These include classroom materials for project team training, and system administration and technical manuals.

From this material, customers will create their own end user classroom training material. Niche supports development of Assistant and CBT material as part of the implementation project and ongoing in-life support. Our complete initial system training package includes:

- Detailed agenda
- Instructor's notes
- Student scenario booklets
- Quick reference guide
- A training manual with details of the material being covered in class
- A database containing data to support this package of material—this is used to generate unique examples for each Student Scenario booklet

NicheRMS project training stages

First stage: Initial system training from Niche

Niche provides initial system training very early in the project. The objective is to provide the project team with a thorough understanding of existing NicheRMS functionality. This training is designed to provide a customer project team with the system knowledge they need to use the initial version of the software, and make business process and system configuration decisions. Customer trainers should be involved at this stage so that they are well informed and able to begin working on training documents.

After training, the customer project team can begin to visualize, understand and document how the NicheRMS will operate within their particular agency, and can begin to consider what changes will need to be made to existing business processes. Once the customer project team has completed the business process analysis, the new processes are documented and become the foundation for creating agency-specific training materials.

Second stage: Follow-up training and support

In the second stage, Niche provides follow-up training and support to the customer project team during the business process analysis/gap fit stage of the project. This follow-up training generally provides refresher training on particular areas of functionality, and is scheduled as required. This training can be provided on-site or remotely, in which case a high-speed remote connection to the customer site is required.

Third stage: Train-the-trainer for customer trainers

The third stage delivers Train-the-Trainer training to customer end user trainers. Ideally this training will be provided by customer trainers who are part of the NicheRMS project team, *i.e.*, the Niche project team trains the customer project team, who then customize the training materials and provide Train-the-Trainer classes for their own end-user trainers and instructors. The purpose is to transfer system knowledge to customer end user trainers so that they can deliver agency-specific training courses and support material.

End user training

End-users are trained by your own agency trainers. The Niche Project team supports this process and provides feedback to that training team.

Business fit training agenda

We have provided our 5-day Business fit training agenda below. For details of where our training fits into the overall project implementation, please see the detailed Project Plan supplied as part of our response to *RMS Attachment 7 - Project Plan*.

Day 1 Introduction and orientation
Brief definition of entities, linking and tasking
Navigation of Niche RMS Universal Application
Viewing a completed incident
Viewing a person record
Searching – Fast Find and Advanced options
Creating a new incident using the Quick Entry Form
Scenario 1
Creating a new incident (standard incident entry)

Day 2 CAD interface
Scenario 2
Tasking within the RMS
Adding property
Cautions and Flags
Scenario 3
Attaching reports to an incident

Day 3 Supervisor Task Approval
Scenario 4
Adding Charges
Adding an Arrest Report
Scenario 5
Action Log
Property Management

Day 4 Field Interview
ACL
Intelligence Submissions
Case File
Saving a Search
Output Reports
E-Crash
Scenario 6

Day 5 E-Citation
Scenario 7
Traffic Arrest forms
NIBRS/UCR
Scenario 8 – Evaluation Scenario

Training wrap up

Training courses provided by Niche Technology

We have provided a summary of the NicheRMS training courses, their prerequisites, hardware requirements and delivery methods. See below for course outlines.

Course outlines

Initial system training

This training provides in-depth training on all functionality included in the NicheRMS application to the project team. This will allow the members to make informed process decisions.

Objectives:

To provide an overall understanding of the existing NicheRMS functionality, including:

- Login with a username and password
- General application navigation, navigation strategies, *etc*.
- Searching for records
- External system searches
- Tour of data organization in NicheRMS
- Data entry
- Task Management
- Filing package preparation management
- Identification/Booking/Custody Training
- Intelligence
- Managing property
- Statistics Gathering
- Managing confidential data/Access Control Lists
- Report generation

Prerequisites	Basic knowledge of Microsoft windows navigation and use. Attendees must be a permanent part of the project team for the duration of the project.
Method	Instructor-led classes, with in-class, hands-on examples and exercises.
Documentation	Provided electronically.
Equipment requirements	Training is run in the customer project environment. This requires installation of the initial NicheRMS version and training database. Each student requires a workstation with keyboard and mouse. The training room requires a projector and a projection screen.
Designed for	Users that will be part of the agency’s project team.
Project Phase	Phase II - Knowledge transfer and business process analysis.
Student Capacity	20 per session, with a maximum of one student per workstation.
Duration	5 days

Business Administration Training

Business administration training provides users with a complete and in-depth understanding of the skills needed to support and maintain the system from a business perspective.

Objectives:

- Add/update/delete lists
- Print management report
- Manage ACLS and NAC roles
- Manage Users, roles, logins and passwords
- Manage Units and sections
- Add printer profiles to workstations
- App installation and maintenance
- Desktop and Mobile Auto Updater
- Bulk Document Loader
- Manage system parameters and other agency-specific system administration
- Building of custom searches
- Configuring the Niche Civil process functionality
- Configuring and maintaining the Investigative Funds functionality
- Audit Functionality—Application
- Documentation of system administration processes

Prerequisites	Thorough knowledge of Windows. Understanding of the agency's structure. Security clearance to access all records including those of other employees. Business Process Training is recommended for better understanding of how the data is being added and manipulated by end users.
Method	Online sessions as required and self-learning (paper). Business administration manuals are provided.
Designed for	Business administrators or those whose job functions may require some system administration tasks.
Project Phase	Conducted over the duration of the project as the project team progresses through the business process analysis.
Student Capacity	As many as needed.
Duration	Approximately 13 days, as required, *i.e.*, Niche provides training as a team member begins work on a specific configuration item.

System (Database) Administration

This course familiarizes system (database) administrators with the underlying structure of the database. System (Database) administrators also learn other necessary database functions.

Objectives:	
• Understanding the NicheRMS data model and structure • Understanding how to write queries against the application and physical data models • How to update the database when application enhancements take place • Understand NicheRMS Audit functionality—technical • Use of server performance monitoring tools • Installing the NicheRMS application • Managing year-end processes • Documenting of database administration processes • Security setup • RMS server setup, backup and maintenance	
Prerequisites	RMS System Administrator Training User must be familiar with SQL Server database administration. Initial System Training is recommended for understanding how data is added and manipulated by users.
Method	Online sessions as required and self-learning (paper). Documentation provided electronically.
Designed for	Business or other technical staff who will be administering the application.
Project Phase	Conducted after Initial System Training and product enhancement has been completed.
Student Capacity	As many as needed.
Duration	Approximately 17 days, as required, *i.e.*, Niche provides training as a team member begins work on a specific configuration.

Technical Configuration Training

This training familiarizes the customer's technical team with the technical configuration capabilities of NicheRMS.

Objectives:
• Familiarization with the NicheRMS data model and data model viewing tool
• Writing technical development specifications
• Development of data conversion processes including data mapping and running of end to end data conversion processes
• Development of interface specifications and development of actual interfaces using the Niche Software development toolkit
• Development of Desktop plugins
• Generation of XSLT output reports, loading and modification of existing Output Reports, using the NicheRMS Output Report editor
• Building of NicheRMS Data window definitions, XML ini generators and form templates
• Generation of XAML reports (x-forms)
• Ability to run queries against the NicheRMS database
• Understanding Niche Application SQL
• Installation and operation of the existing NicheRMS interfaces such as:
  o NicheRMS CAD interface
  o NicheRMS Publish interface
  o NicheRMS Livescan interface
  o Other interfaces as required
• Documentation of database administration processes	

Prerequisites	• RMS System Administrator Training
	• User must be familiar with SQL Server database administration
	• Data conversion developers:
	  o SQL knowledge
	  o Understanding of existing system and its data model
	  o Develop an understanding of NicheRMS and its data model
	• Interface development team members:
	  o C++ and/or C#
	  o SQL knowledge
	  o Microsoft .Net tool familiarity including Visual Studio 2008/2010
	  o For interfaces using XML, XSLT for transformations
	  o In addition, the developer will need to be well briefed on the NicheRMS Data model and the Niche tools
	• Output Report and form template development team members:
	  o For the Output Report and data window definition training, here is the list of skills that are required:
	    ▪ Good knowledge of XML

	▪ Good knowledge of XSL/XSLT ▪ Good knowledge of HTML/XHTML, including CSS (Cascading Style Sheets) ▪ Understanding of SQL ▪ Understanding of NicheRMS application and data model (to be learned) Niche will supply a variety of documentation and sample reports to assist customers in the process of developing reports. Niche will also provide telephone and email support to customer and third-party developers. XAML reports (X-forms) development team members: o Knowledge of XAML o Understanding of NicheRMS application and data model (to be learned)
Method	Online sessions as required and self-learning (paper). Documentation provided electronically.
Designed for	IT or other technical staff who will be administering the database.
Project Phase	Conducted after Initial System Training and product enhancement has been completed.
Student Capacity	3 students per technical area.
Duration	Estimated to be 36 days, as required, *i.e.*, Niche provides training as a technical resource begins work on a specific technical configuration.

Additional training tools and system capabilities

There are major challenges involved in delivering training on a new system to a large number of users distributed across a large geographic area, while minimizing the impact on operations, in both a timely and cost effective manner.

Classroom-based training has historically been relied on to train end users. It is thorough, but costly and usually not timely. If there is a long delay between training and system use, there is a loss of skill. There is also a lot of overhead with classroom training—the room, the hardware, the trainers and the development of mass training material is expensive and hard to manage.

Users nowadays have more interaction with technology than ever: use of smartphones and tablets at home mean users have a base level of familiarity with technology that should be exploited for training on a new NicheRMS system.

There is an opportunity for e-learning and other newer training technologies to assist with and reduce the need for classroom based training. Niche Technology has developed two new functions to support this: Assistant and integrated computer-based training (CBT).

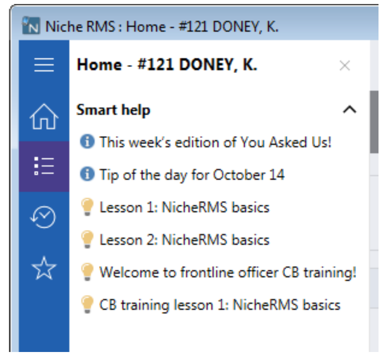
Assistant

Niche's Assistant integrates support into the NicheRMS app at the point of data entry, but without intruding on officer workflow. Context-sensitive content can be delivered to users wherever they are in the system. Assistant features include:

- Conventional help, modelled on paper manuals, is re-imagined as targeted, interactive and engaging assistance.
- Context-sensitive: updates instantly.
- Configurable and programmable.
- Different modes based on the user skill level, such as new user and expert modes.
- System and policing topics can both be covered. This is meant to be a living/evolving system that can be updated incrementally to optimize user performance.
- The agency can provide targeted, data-driven "nudges" based on user psychology—many small pushes in the right direction often works better.
- Agencies can provide rich content including videos, live Helpdesk and peer support through VoIP, forums and chat. Content can be evolving, social and engaging.
- Encourages continuous learning through tutorials, short videos, and tips (short for on the job and longer for downtime).

Niche Assistant responds to an officer's immediate need ("What do I do next?") and provides just-in-time help, taking job, skill level, role, performance history, *etc*., into account. A key feature is that this leverages rich data about an officer's situation live in NicheRMS.

Assistant in the user interface



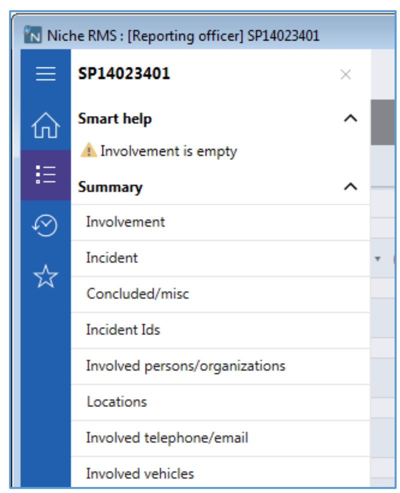
The Assistant option appears as a button in the NicheRMS sidebar. When tapped, it displays a side panel with help. The information that is displayed depends on what view is active when you select Assistant. For example, from the Home view, the Assistant displays a general set of help topics. The following types of help content are supported:

- Field level tips
- Published material
- Access to internet or intranet help websites
- Direct links to CBT
- Videos
- Targeted, data-driven nudges
- Peer support through VoIP, forums or chat with a local help desk

Live Chat and similar help desk functionality must be supplied by the customer police agency. Niche can assist with planning and setup.

Help will be displayed in the side panel as users work, but it is *intelligent help*. The app tracks what the user is doing, and provides targeted Help that they need. The main goal of the Assistant is to provide the right information for the right officer or investigator at the right time. In addition, different levels of help can be provided based the experience of the user. For example, an experienced user might see one set of help while an inexperienced user sees a more extensive list of help options.

This is a step up from conventional help. It is context sensitive and updates immediately. It is unobtrusive but readily available. It does not interfere with the officer's view of data, but is easy to see.



The Assistant provides additional features when users are working in Incident records or other database records. If you click or tap this button when you are looking at an Incident record, as shown to the right, you may be presented with additional information, such as:

- Context-sensitive help for the type of record you are working in.
- Specific messages warning you about required data that is missing.

For records with many sections, you will also see a **Summary** list of the sections included in that record, as we show in our example on the right. These are bookmarks. Click a bookmark to jump to that section of the record. This means less time spent scrolling looking for a particular section of record.

Built-in CBT

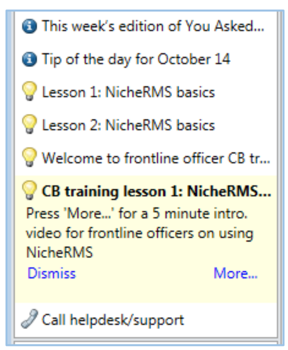
NicheRMS Assistant can provide direct links to CBT options. This provides parallelism in training, allowing training to be carried out for large numbers of users at the same time. It also allows for different learners to progress at different speeds. This can be used in conjunction with standard classroom training: the possibility exists to allow students to progress through the CBT material at their own speed, with an instructor available to answer questions.

NicheRMS delivers this through the use of **Personal training domains**. In traditional classroom based training for 20 users, a training team would have to construct 20 sets of material – unique exercises and database content – to support each user. If there were multiple classrooms running simultaneously, each would have to have a unique training environment so that the classes do not interfere with one other.

Instead of this, NicheRMS personal training domains allow you to develop and administer a single set of course material and database content for training an entire group of users. Features:

- Each user has one or more individual training “domains” (sandboxes).
- Personal training domains are initialized with material needed for a particular course/lesson.
- Course material can include videos and interactive Assistant content.
- Officers who need immediate assistance in using the system can call a helpdesk, or consult a forum (for slow-time help).

NicheRMS supports integrated CBT that can assist with initial system training, remedial training and training on specific NicheRMS jobs. It is flexible and manageable and simplifies the delivery of new system training to a large number of users distributed across a large geographic area, minimizing the impact on operations, in both a timely and cost effective manner.



It is often easier for a skilled user to create a video than to create a written manual and it may be easier for other users to follow. We see this being used not only as standalone CBT but actually as part of classroom style training where officers work at their own pace.

For example, in recent training experience with classroom style training, quick users were taking 30 minutes to get through a lesson, and slower learners were taking 90 minutes to get through the same material. This approach allows a faster learner to continue on and finish earlier and get back to their day job, while the slower learner can learn at their own pace without feeling like they need to compromise their learning.

This could cut down on the time spent in classrooms and the soft costs of having an officer off the road and in a classroom.

Training for new releases, enhancements or upgrades

After the application is in production use, new NicheRMS releases, enhancements and upgrades are accompanied by release notes and updates to the manuals. Additional training sessions have not typically been required by our customers, but we can and have provided training advice via email and telephone; further training sessions can certainly be made available, if necessary.

Support and training provided for on-site, end user support during cutover

Niche will provide a training plan that accounts for support during cut-over and transitions to new functionality. The Niche project team will be onsite for cutover to live operation. As well, 24x7 technical support is provided.

NicheRMS training environments

Under the standard NicheRMS licensing, the customer can set up as many NicheRMS systems as needed. There are no limitations to use.

Initially, we setup a standard NicheRMS training environment using the most up to date NicheRMS version and the Niche training database. The Niche project team then trains the customer project team on the NicheRMS.

Additional environments, usually include testing, development, data conversion and end user training, are setup as the project progresses. When Niche delivers new NicheRMS versions, these environments are updated.

The training environment can be accessed from any workstation that NicheRMS is installed on. The login window provides the user with a list of databases that are available; the user can just select the training environment as the option on the login window.