EGEE NA3 Planning

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CERN
13th November 2003
Contents

- Challenges
- Timeline
- Preparatory Activities & Interactions
- Preliminary View of Months 1 - 6
The EGEE Virtuous Circle
EGEE Training Goals

User Training & Induction

Courseware Planning
- Topics
- Level / Target Audience
- Delivery Mode
- Technical Content

Course Delivery
- Global / Regional Plan
- Development & Maintenance of Teachers Skills
- Input Metrics

Course Infrastructure
- Global / Regional Centers
- Classroom
- Training Room
- Course in a Box
- Logistic Support
- Distance Learning
<table>
<thead>
<tr>
<th>Course Type</th>
<th>Average Attendance</th>
<th>Course Requirements</th>
<th>Number per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Induction</td>
<td>50</td>
<td>2 Day Web Access</td>
<td>≥ 10</td>
</tr>
<tr>
<td>Application Developer Training</td>
<td>25</td>
<td>4 Day Workstations</td>
<td>≥ 8</td>
</tr>
<tr>
<td>Advanced Courses</td>
<td>25</td>
<td>5 Day Workstations</td>
<td>≥ 2</td>
</tr>
<tr>
<td>Technical Activity specific Retreats</td>
<td>30</td>
<td>2 Day</td>
<td>≥ 6</td>
</tr>
</tbody>
</table>
The Challenge

- Establish & Deliver Training

- Diverse requirements
  - Experimental Particle Physics Drivers
  - Diverse heterogeneous drivers in medicine, biology, engineering, ...

- Diverse and distributed contributing partners
  - Very large number - Not known to each other
  - Many small fragments - of unknown quality & commitment
  - With existing investment in training material and trainers
  - Not known to NeSC

- Very Limited Resources for Planning prior to Month 1
  - No available staff
  - No available budgets
Timeline

- Preliminary Course Set Preparation Tested with UK e-Science Programme
- Survey of Training Material & Inventory Database Designed
- Formulate Training Model
- Training Team Building
- Initial Courses Run using *ad hoc* transition model
- 3 Month Course Schedule Announced
- Standard Course Model Specified
- Initial Training Inventory Complete
- Regular Training Plan Operational

Month 1
Month 2
Month 3
Month 4
EGEE Charging starts (April or June 2004?)
Training Team Building

- **Appointments at Edinburgh**
  - Led by John Murison - training manager
  - PPARC funded immediately
  - EGEE funded on Contract Agreement

- **Developing Knowledge of Partners’ Capabilities**
  - Mail list
  - Information gathering

- **Training and Induction of Trainers**
  - Technical and / or training skills
  - Exchange with expert groups
    - In USA & Europe
Formulate Training Model

- Specification of Course House Style
  - Event scheduling model
  - Course requirement identification model
  - Staff selection model
    - Team leader, Trainer(s) & Tutor(s)
  - Training material preparation schedule
    - See inventory of training resources
  - Event venue requirements and “contract” with hosts
    - Inventory of venues and hosts required
  - Course delivery planning
    - Equipment, travel, software and accommodation of training team
Training Model cont

- Participant Registration
  - Build on NeSC & EDG established processes
  - Hosts manage local accommodation advice or booking
  - Prerequisites

- Course Delivery
  - Team work, quality management, languages & support

- Course Evaluation
  - Participants’ exit survey
  - Trainers’ exit survey

- Feedback into Course Planning Process
Survey of Training Material

- Characterise Training Material Properties
  - Contents
  - Delivery method
  - Owners / developers
  - IPR
  - Technical requirements
  - Relationship with other material
- Design DB Schema
- Design e-Forms for Information gathering
- Directly enter material known to the NeSC team
Inventory Building

- **Training Material**
  - Solicit input from EDG team
  - Solicit input from EGEE partners
  - Invite input from others (USA, Japan, ...)

- **Venues and Hosts**
  - Establish database schema
  - Establish e-Forms
  - Solicit input from EGEE partners

- Revise every 3 months *(initially?)*
Preliminary Course Development

- Team training & Induction
- Material Review and Ingest
  - Select existing material
  - Bring it into EGEE style and form
  - Develop material to fill gaps
- Presentations at NeSC
  - to (primarily) UK participants
  - UK commitment + low risk improvement of material & team performance
- Events for first three months scheduled
  - Planning and participant registration
3-Month Course Schedule

- **Dates**
  - Agreed - not clashing with major Grid / e-Science events

- **Venues**
  - Geographic Distribution
    - Quality, balance and scale?
  - Correlation with other EGEE events
    - Avoid unnecessary problems

- **Content**
  - Agreed topics and formats to aid rapid start up
    - New staff, new skills requirements and community building
Standard Course Model

- Agreed mechanism for establishing and running a training event
  - Training Quality Plan
- Based on β testing of initial training events
  - 4 months of planning
  - Previous presentations in UK
  - First month’s events
  - Feedback from EGEE Partners
- Defined in a standard EGEE document in EDS
  - Supported by style documents and examples
- One complete training event as a tutorial example
Initial Training Inventory

- Result of DB design & Survey
- DB accessible by EGEE partners
  - Description of available training material
  - Description of Venues
    - Capacity
    - Facilities
    - Costs
  - Description of Hosts
    - Staff they can invest / event
    - Skills
    - Languages
Regular Training Operational

- Standard “house style” in use
- Schedule announced > 3 months ahead
- Balance and Location Pattern Agreed
  - Partners
  - NA1
- Feeding into statistical performance model
  - Key Performance Indicators
  - Revision of plan & standard
- Deliverables
  - Allocation of staff time to their production
    - Documents, web-based training material, reports
Deliverables - Milestones

Month 3  Training Plan
Month 6  *Initial* Training Material
Month 9  Revised Training Plan
          Training Progress Report
Month 12  External Review of User Training
Month 15  Revised Training Plan
Month 18  Training Progress Report
Month 24  Training Progress Report
          External Review of User Training
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Months 1 & 2

- Fundamental Skill Development of new hires
  - What will be the skill gaps we need to fill?
  - Tell us your best guess of requirements that won't be met internally
- Internal team and community building
  - Training teams, Each Activity team, ...
  - Tell us your requirements, we’ll try ...
- In-depth workshops developing understanding
  - Experts from within (and outside?) EGEE
  - Also builds team spirit & training material
  - What topics?
Months 2 & 3

- Overflow from Month 1 & 2 requirements 😊
- Initial User Induction Courses
  - Which disciplines do we target?
  - What can we assume?
- More Advanced Skills Development
  - EGEE staff courses
    - Depends on material from the Engineering & Operations Groups
  - Application Developer Staff Development
    - Requirements?
    - Material?
Months 5 & 6

- Regular Pattern of Distributed Training Events
  - Course translation & recording
- Adding Advanced training
  - For EGEE staff
  - For Application Developers
  - For End Users
- Driven by Priorities
  - Derived by systematic requirement gathering
    - For each community
- Revisions of Material & “EGEE Style / Standard”
  - Systematic analysis of participant & trainer evaluations
Dependencies & Relationships

- Interaction with BOTH web sites
  - Internal advertising and self-training
  - External advertising and self-training
  - Registration on our own web site

- Training material
  - Depend on existing resources (EDG etc)
  - Depend on active contribution from NA3 community
  - Depend on technical information from all Engineering and Application teams
  - Depend on timing information from Engineering teams
    - Courses clearly labelled wrt product, beta test, transition, etc.