



Enterprise Learning Central booking and Self-booking Activities

12/13/2011

Department of Finance and Administration
Office of the Mississippi Management and Reporting System

AGENDA

- 1. Workshop Ground Rules**
- 2. Workshop Guiding Principles**
- 3. Workshop Objectives**
- 4. Workshop Agenda in Detail**
- 5. Workshop Roles**
- 6. Workshop Content**
- 7. Workshop Wrap-up**

Workshop Ground Rules

- All participants should be familiar with the requirements and the topics to be covered;
- The workshop scribe is responsible for documenting the parking lot issues and follow up questions;
- The workshop facilitators are responsible for keeping the discussion centered on the topic being discussed. If an issue is determined that cannot be resolved during the workshop, the facilitator will note the issue for future resolution and enter it into the workshop output document; and
- Parking of discussion item if the required knowledge is not in the room.

Workshop Guiding Principles

Workshop

- Demonstrate how requirements are met using Standard SAP functionality
- Utilize standard SAP functionality (80/20 rule)
- Avoid the “what won’t work” mindset

Essential to dos:

- Review Business Process Model
- Update/Create process Flow Diagrams
- WS Output Documents
- Identify RICEFW Objects
- Solution Manager:
 - Create Business Blueprint documents
- Identify Issues and Risks



Participant

- Be attentive and open minded
- Explore questions and answers
- Encourage input from other participants
- Refrain from absolutes and mandates
- Focus on current issue being discussed
- Avoid “war stories”
- Manage cell phone, pagers & interruptions
- Keep the conversations to one at a time

Workshop Objectives

- Introduce The Workshop Concept
- Explore booking related activities
- Establish process flow



Requirements Reference

Requirement ID	Description
630210	Ability for employees to view and search the course catalog and schedule of training sessions, and register for available courses
630211	Ability for employees to request training
630212	Ability for participants to access a web page for the enrollee to perform various activities including request training via application, which initiates routing for approval via workflow to user-defined approval points
630213	Ability for participants to access a web page for the enrollee to perform various activities including cancel attendance, which generates an email via workflow to the employee's training coordinator, the training session coordinator, and the employee's supervisor
630214	Ability for participants to access a web page for the enrollee to perform various activities including ask a question, which generates an e-mail to the appropriate person via workflow

Requirements Reference

Requirement ID	Description
630235	Ability to calculate and trigger a deduction for tuition reimbursement owed to the state upon termination, retirement
630888	Ability to support the functionality of enrollment
630889	Ability to support the functionality of attendance tracking (by person)
630890	Ability to support the functionality of identification of the attendee's training coordinator (name and contact information)
630891	Ability to support the functionality of e-mail notifications
630893	Ability to support the functionality of limiting the number of training session slots available to outside agencies/organizations
630894	Ability to support the functionality of prioritizing training session slots by agency/organization
630897	Ability to setup and generate customized notification letters (paper or e-mail)

Requirements Reference

Requirement ID	Description
630906	Ability to interface with email to calendar training events for invitees or enrollees
630909	Ability to define career development plan, including standard and alternative career paths
630911	Ability to set up and track mentors for designated groups as part of a career development initiative, including name, e-mail address, business address and phone number
630921	Ability to provide for the input of training course/program interest for employees and supervisors
630922	Ability to use recorded training interests as a way to offer specific programs/courses that address those interests
630924	Ability to notify all appropriate training coordinators of a planned training session
630976	Ability to enter and route training requests that would include requestor name, agency, number



Requirements Reference

Requirement ID	Description
630977	Ability to enter and route training requests that would include class title, start and end date, hours, location, number of credits.
630978	Ability to enter and route training requests that would include basis for request (e.g., job related, career related, personal development)
630979	Ability to enter and route training requests that would include type of training (e.g., EEO, technology, supervisory, safety, other)
630980	Ability to enter and route training requests that would include funding source
630981	Ability to enter and route training requests that would include estimated course and travel cost
630983	Ability to provide on-line approval of training requests as defined by the agency
630984	Ability for multiple levels to authorize training requests
630985	Ability to generate customizable notification forms by user-definable criteria (division for example) at a predefined period of time prior to the start of the training session



Requirements Reference

Requirement ID	Description
630986	Ability to provide for training administrators to generate adhoc notices to registered participants for a scheduled training session
630987	Ability to monitor enrollment in classes, including employees prevented from enrolling due to failure to meet prerequisite requirements, with an override capability to relax restriction of enrollment prerequisites
630988	Ability to reserve a block of seats in a training session by agency
630989	Ability to allow the training administrator or employee supervisor to enroll their employees in a specific training session
630990	Ability to show the availability of open seats and the length of the waiting list (if applicable) at the time that an employee is enrolled for a training class
630991	Ability to create a wait list when training session maximum enrollment is reached



Requirements Reference

Requirement ID	Description
630992	Ability to provide a list of replacements for the training session roster based on the job classification of the employee in the wait list queue or other user-defined criteria
630993	Ability to track session wait lists and to sequence wait lists based on registration time and date
630995	Ability to notify enrollees via email or paper when enrolled in, or wait listed for, a training session
630996	Ability notify enrollees via email or paper when a training session is cancelled, postponed, changed or rescheduled
630997	Ability to open registration to a filled session if the facility or room configuration changes and notify those on an existing wait list
630998	Ability to produce notification of conflicts regarding training schedules, training facilities and registered trainees
631002	Ability to schedule and track employee participation in non-formal training events such as conferences and web casts



Workshop Agenda

Team	Enterprise Learning Team			
Date	12/13/2011			
Topics	09:00 Overview Booking Rebooking Cancelling Replacing Reschedule		13:00 Notifications Book Cancel Change Resource Reservation Confirm Participation Nametags	
	10:30 Break		Notify Training Provider	
	11:00 Course Completion Correspondence Triggers		Rebook Participation Prebook Participation	
	12:00 Lunch		Send Participation Information	
		15:00	Break	
Deliverables	<ul style="list-style-type: none"> Business process design 		15:30 Approval Processes - Workflow	



Blueprint Workshop - Roles

SAP Facilitator	Frank Hanfland
Customer Facilitator	Susan Perry, DFA
Scribe	[Name]
Time Keeper	[Name]
Subject Matter Experts	Julia Summers – SPB Susan McClain – ITS Beverly Hinson – MMRS
Other Attendants	[Name]



A successful workshop is the result of interaction and participation!

Booking

- Participants are ‘booked’ into a course (E/ET)
- Participants are ‘booked’ into a curriculum (EC)
- Participants are ‘subscribed’ to course programs (EK)

	Booked for same Type	Pre-Booked for same Type	Pre-requisite Course	Pre-requisite Qualification
Applicant	W	W	W	
External person	W	W	W	
Prospect				
Customer				
Organizational unit				
Person	E	W	E	W
Contact person	W	W	W	
Company				
User	E	W	E	W

E	Mess.type for attendance/instructor func. conflict
W	Message type for attendance/attendance conflict

Pre-Booking

- Participants can be ‘prebooked’ to any course type
 - Signals ‘Demand’

Rebooking

- Places same participant into same course on different date

Replace

- Places different participant into same course on same date

Cancel

- Removes participant
- Places next participant on waitlist into course
- Fee Handling
- Cancellation Reasons
- Cancellation Reasons for Portal

A	Cancel Curriculum: A = All, S = Single, P = Parts
X	Cancellation Guidelines for Web-Based Training

0	Default value for cancellation fees
1	Mode for move-ups from waiting list (interactive, Direct, None)

Waitlist

- Ranking by time of booking
- Can be overridden
- Weighting
 - ‘Waitlist’ =
 - ‘Normal’ =
 - ‘Essential’ =

51	Booking priority for Internet
9	Maximum priority for essential booking
90	Minimum priority for waiting-list booking
50	Default priority for normal booking

Follow-Up/Course Completion

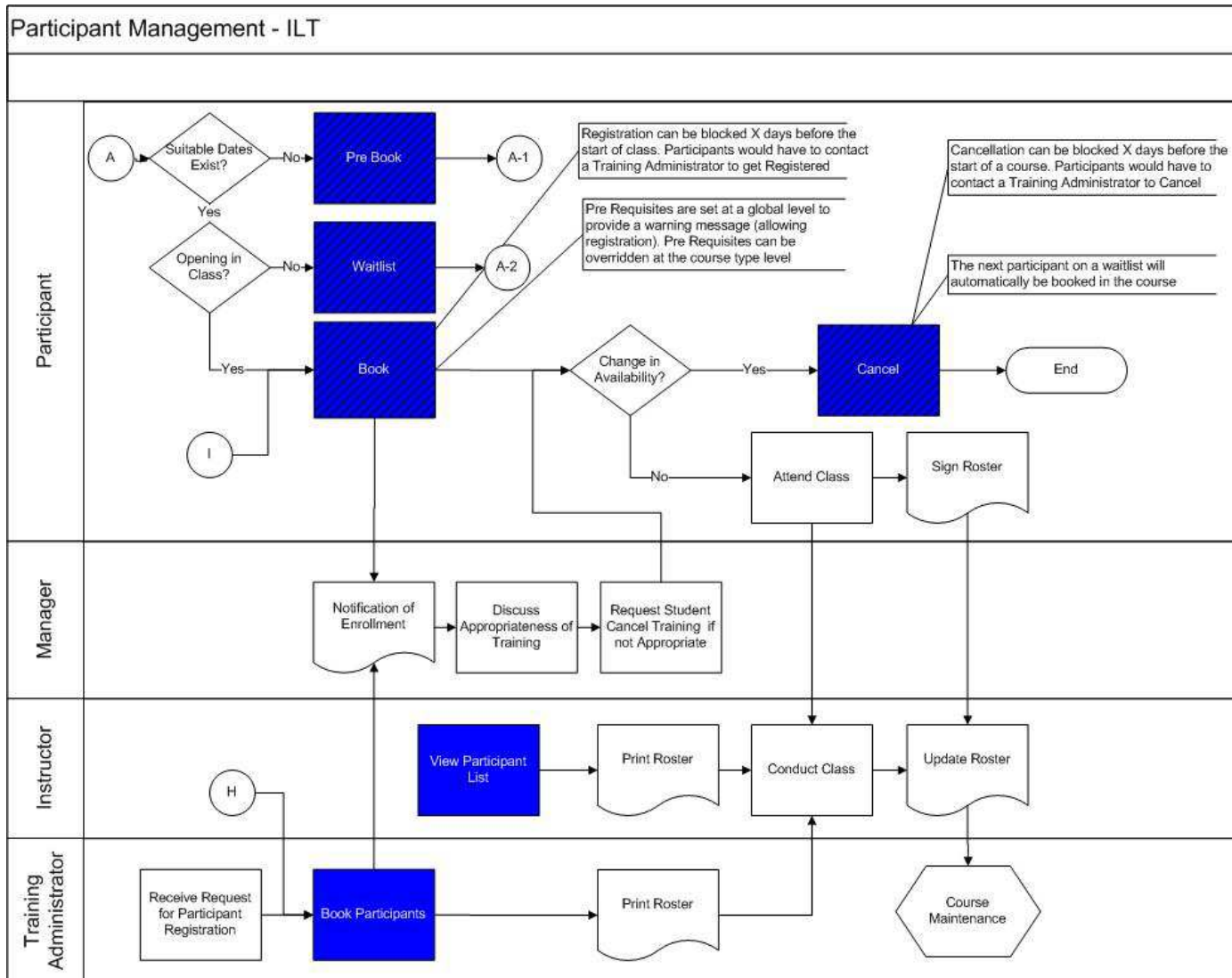
- Follow-up Pass or All
 - Course Failed reasons
 - Cancellation Reason in follow-up
- Guidelines for Curriculum (All or Single)
- eLearning
 - Has Implications on re-taking
- Course Program
 - Progress all/single

Correspondence Triggers

- Manual (by Training Administrator)
- Automatic to
 - Learner
 - Manager
 - Instructor
 - Training Administrator
- Via
 - Fax
 - Printer
 - eMail
 - Sap Mail
 - SMS
- Reason
 - Book
 - Cancel
 - Change Resource Reservation
 - Confirm Participation
 - Nametags
 - Notify Training Provider
 - Rebook Participation
 - Prebook Participation
 - Send Participation Information



Process



Process Draft

- Booking
- Rebooking
- Cancelling
- Replacing
- Reschedule
- Course Completion
- Correspondence

Correspondence Triggers

- Manual (by Training Administrator)
- Automatic to
 - Learner
 - Manager
 - Instructor
 - Training Administrator
- Via
 - Fax
 - Printer
 - eMail
 - Sap Mail
 - SMS
- Reason
 - Book
 - Cancel
 - Change Resource Reservation
 - Confirm Participation
 - Nametags
 - Notify Training Provider
 - Rebook Participation
 - Prebook Participation
 - Send Participation Information

Correspondence Triggers

- Correspondence is set up and unique to per correspondence trigger type, for example:
 - On Book, send Confirmation to Learner
- The correspondence is the SAME for all course types and all agencies

Booking Confirmation

AARDF Recipient: Form of Address

AANRD Form of Address: Recipient

AGRUS Name: Salutation (Recipient)

KSTXT Object name: business event

KOTYP Object type: business event

KOBJD Object ID: business event

TCANZ Number of attendees

TANRD Title: attendee

TGRUS Greeting: Attendee

TXTSING Delivery Method Text

SENDER Sender

VCNAM Address supplement: Organizer

VSTRS Street: Organizer

V_PLZ Postal code: Organizer

V_ORT City: Organizer' address

VLAND Country key: Organizer

VSTXT Object name: Organizer

AADDRPF AADDRPF Text Variable: Recipient
Address for Correspondence

DATE Current Date of Application Server




Booking Confirmation

{VSTXT}
{VCNAM}
{VSTRS}

{V_PLZ} {V_ORI}
{VLAND}

Booking Confirmation
Administrat or: E-mail: Telephone: Mobile: Fax:

Date: 

{AARDF} {AANRD} {AGRUS},

We would like to confirm your booking for the course

Course: {KSTXT}
Reference number: {KOTYP} {KOBJD}
Delivery method: {TXTSING}

with the following data:

Number of participants: {TCANZ}
Participant: {TANRD} {TGRUS}

For further details about the course, see the attached form.

For details about your current training activities and other relevant information, see your personal learning portal.

Kind regards,

{SNAME}

Pre - Booking Confirmation

AARDF Recipient: Form of Address
AANRD Form of Address: Recipient
AGRUS Name: Salutation (Recipient)
KOTYP Object type: business event
KOBJD Object ID: business event
TCANZ Number of attendees
TANRD Title: attendee
TGRUS Greeting: Attendee
TXTSING Delivery Method Text
SENDER Sender
VCNAM Address supplement: Organizer

VSTRS Street: Organizer
V_PLZ Postal code: Organizer
V_ORT City: Organizer' address
VLAND Country key: Organizer
VSTXT Object name: Organizer
AADDRPF AADDRPF Text Variable: Recipient
Address for Correspondence
DSTXT Object name: business event type
DATE Current Date of Application Server




Pre - Booking Confirmation

{VSTXT}
{VCNAM}
{VSTRS}

{V_PLZ} {V_ORG}
{VLAND}

Prebooking
Administrat or: E-mail: Telephone: Mobile: Fax:

Date: 

{AARDF} {AANRD} {AGRUS},

We would like to confirm that a prebooking has been made for the course

Course: {DSTXT}
Reference number: {DOTYP} {DOBJD}
Delivery method: {TXTSING}

for the participant: {TANRD} {TGRUS}

Number of prebookings: {TCANZ} .

We will notify you or the participant as soon as new course dates have been scheduled.

For details of your current training activities and other relevant information, see your personal learning portal.

Kind regards,

{SNAME}

Re - Booking Confirmation

AARDF Recipient: Form of Address
AANRD Form of Address: Recipient
AGRUS Name: Salutation (Recipient)
KSTXT Object name: business event
KOTYP Object type: business event
KOBJD Object ID: business event
TCANZ Number of attendees
TANRD Title: attendee
TGRUS Greeting: Attendee
TXTSING Delivery Method Text
SENDER Sender

VCNAM Address supplement: Organizer
VSTRS Street: Organizer
V_PLZ Postal code: Organizer
V_ORT City: Organizer' address
VLAND Country key: Organizer
VSTXT Object name: Organizer
AADDRPF AADDRPF Text Variable: Recipient
Address for Correspondence
DATE Current Date of Application Server
EOTYP Object type: reserved/cancelled
bus.event



Re - Booking Confirmation

{VSTXT}
{VCNAM}
{VSTRS}

{V_PLZ} {V_ORI}
{VLAND}

Rebooking
Administrat
or:
E-mail:
Telephone:
Mobile:
Fax:

Date:



{AARDF} {AANDR} {AGRUS},

We would like to confirm the rebooking of the participant {TANRD} {TGRUS}.

Cancelled booking:

Course: {ESTXT}
Reference number: {EOTYP} {EOBJD}
Delivery method: {TXTSING}

Current booking:

Course: {KSTXT}
Reference number: {KOTYP} {KOBJD}
Delivery method: {TXTSING}

Number of participants rebooked: {TCANZ}

For further details about the course, see the attached form.

For details of your current training activities, see your personal learning portal.

Kind regards,

{SNAME}

Resource Reservation

AARDF Recipient: Form of Address
AANRD Form of Address: Recipient
AGRUS Name: Salutation (Recipient)
KSTXT Object name: business event
KOTYP Object type: business event
KOBJD Object ID: business event
TXTSING Delivery Method Text
SENDER Sender
VCNAM Address supplement: Organizer
VSTRS Street: Organizer
V_PLZ Postal code: Organizer
V_ORT City: Organizer' address
VLAND Country key: Organizer
VSTXT Object name: Organizer

AADDRPF AADDRPF Text Variable: Recipient
Address for Correspondence
PARTACTYTXT Participation: Participation
Status
DATE Current Date of Application Server




Resource Reservation

{VSTXT}
{VCNAM}
{VSTRS}

{V_PLZ} {V_ORI}
{VLAND}

Resource Change
Administrat or: E-mail: Telephone: Mobile: Fax:

Date: 

{AARDF} {AANRD} {AGRUS},

The course for which you are planned:

Course: {KSTXT}
Reference number: {KOTYP} {KOBJD}
Delivery method: {TXTSING}

has been changed. The following change was made: {PARTACTYTXT}

For more details about the course and the resource changes, see the attached form.

Kind regards,

{SNAME}

Resource Reservation

AARDF Recipient: Form of Address

AANRD Form of Address: Recipient

AGRUS Name: Salutation (Recipient)

KSTXT Object name: business event

KOTYP Object type: business event

KOBJD Object ID: business event

TCANZ Number of attendees

TANRD Title: attendee

TGRUS Greeting: Attendee

TXTSING Delivery Method Text

SENDER Sender

VCNAM Address supplement: Organizer

VSTRS Street: Organizer

V_PLZ Postal code: Organizer

V_ORT City: Organizer' address

VLAND Country key: Organizer

VSTXT Object name: Organizer

AADDRPF AADDRPF Text Variable: Recipient
Address for Correspondence

DATE Current Date of Application Server



Resource Reservation

{VSTXT}
{VCNAM}
{VSTRS}

{V_PLZ} {V_ORI}
{VLAND}

Information
Administrat
or:
E-mail:
Telephone:
Mobile:
Fax:

Date:



{AARDF} {AANDR} {AGRUS}.

We would like to give you updated information about the course:

Course: {KSTXT}
Reference number: {KOTYP} {KOBJD}
Delivery method: {TSTSING}

with the following data:

Number of participants: {TCANZ}
Participant: {TANRD} {TGRUS}

For further details on the course, see the attached form.

For details of your current training activities, see your personal learning portal.

Kind regards,

{SNAME}

Nametags

TLARD Form of address: attendee (tabular variable)

TLIST Attendee:(Title Surname) for attendee list

TLNAM Name: salutation (attendee) (tab.)

TLOGR Object name: org. unit assigned to attendee (tab.)



Nametags

<p>IDES AG Training</p>	
<p>{TLARD} {TLNAM}</p>	
<p>{LORG}</p>	

Cancellation of Booking

AARDF Recipient: Form of Address
AANRD Form of Address: Recipient
AGRUS Name: Salutation (Recipient)
KSTXT Object name: business event
KOTYP Object type: business event
KOBJD Object ID: business event
TCANZ Number of attendees
TANRD Title: attendee
TGRUS Greeting: Attendee
TXTSING Delivery Method Text
SENDER Sender
VCNAM Address supplement: Organizer
VSTRS Street: Organizer

V_PLZ Postal code: Organizer
V_ORT City: Organizer' address
VLAND Country key: Organizer
VSTXT Object name: Organizer
AADDRPF AADDRPF Text Variable: Recipient
Address for Correspondence
PARTCANCTXT Participation: Cancellation
Reason Text
DATE Current Date of Application Server




Cancellation of Booking

{VSTXT}
{VCNAM}
{VSTRS}

{V_PLZ} {V_ORG}
{VLAND}

Booking Cancellation
Administrat or: E-Mail: Telephone: Cell Phone: Fax:

Date: 

{AARDF} {AANRD} {AGRUS},

We would like to confirm cancellation of your booking for the course

Course: {KSTXT}
Reference number: {KOTYP} {KOBJD}
Delivery method: {TXTSING}

with the following data:

Number of participants: {TCANZ}
Participant: {TANRD} {TGRUS}

The reason for cancellation is: {PARTCANCTXT}.

For details of your current training activities and other relevant information, see your personal learning portal.

Kind regards,

{SNAME}

Information about Course

SENDER Sender	KNDDA Validity end date: business event
VSTXT Object name: Organizer	KBTIM Start time: business event (day 1)
VCNAM Address supplement: Organizer	KBDAY Start day: business event
VSTRS Street: Organizer	KETIM End time: business event (last day)
V_PLZ Postal code: Organizer	KEDAY End date: business event
V_ORT City: Organizer' address	KSCCHEDULE Course: Course Schedule
VLAND Country key: Organizer	FSTXT Object name: business event location
KSTXT Object name: business event	BSTXT Object name: building (business event room)
KOTYP Object type: business event	RSTXT Object name: Room (event location)
KOBJD Object ID: business event	IANRD Form of address: Instructor
KSTATUS Course: Course Status	IGRUS Name: instructor (title, first and last names)
PARTREFCURRTXT Participation: Name of Relevant Curriculum	PARTPRGRSS Participation: Learning Progress
TANRD Title: attendee	KDSCR Course: Course Description
TGRUS Greeting: Attendee	TXTSING Delivery Method Text
KBGDA Validity start date of business event	SCHEDULE_DEP Indicator 'Time-Specific'
	DATE Current Date of Application Server
	LOCATION_DEP Indicator 'Location-Specific'



Information about Course

Administrat
 or:
 E-mail:
 Telephone:
 Mobile:
 Fax:

{VSTXT}
 {VCNAM}
 {VSTRS}

 {V_PLZ} {V_ORI}
 {VLAND}

Status:

Course Information

Course Title:				
Reference Number:				
Course Status:				
Delivery Method:				
The course is part of the curriculum:				
Participant:				

Schedule and Location Information

Course Start Date:				
Course End Date:				
Course Location and Room:				
Instructor:				
Course Schedule:				
	Date	Weekday	Start Time	End Time

Participation Information

Type	Value	

Other Important Information

Page #

41

Workflow

- Workflow is only available for self-booking activities
- If an Admin/Instructor books, it is assumed to be approved.
- Workflow is system generate and goes to the org units manager (chief)
- No option for additional input.
- Wording can be configured.

Workflow Triggers

- 2 options for each delivery method:
 - Book Request
 - Cancel Request
- For Time and Location dependent Courses:
 - Requestable up to N days before start of course
 - Approvable up to N days before start of course
 - After that, auto approve

Workflow – Booking Request

Time and Location Dependent:

&LEARNER.LEARNERNAME& requests participation in the course
&TRAINING.TRAININGNAME&.

The course starts on &TRAINING.BEGINDATE&. &LEARNER.LEARNERNAME& was
already automatically booked by the workflow system.

You can approve or reject the request up to &FINALAPPROVALDATE&. After
this date, participation is automatically considered to be approved and
&LEARNER.LEARNERNAME& remains booked for the course.

You can find further details about course participation in the
attachments.

Choose one of the decision options given. This completes the processing
for this step.

If you choose <H>Cancel</>, the user decision remains in your inbox for
processing.

Workflow – Booking Request

Time and Location IN-Dependent:

&LEARNER.LEARNERNAME& requests participation in the course
&TRAINING.TRAININGNAME&.

You can find details of the course participation in the attachments.

Choose one of the decision options given. This completes the processing
for this step.

If you choose <H>Cancel</>, the user decision remains in your inbox for
processing.

If you choose <H>Cancel</>, the user decision remains in your
inbox for processing.

Workflow – Booking Approval

Auto Approve (once timeframe for approval has expired):

Your supervisor had the opportunity up to &FINALAPPROVALDATE& to approve or reject your participation in the course &TRAINING.TRAININGNAME&.

Since he/she neither approved nor rejected it, the workflow system automatically booked you for the course.

You can find more information about the course in the Learning Portal.

We wish you successful training!

Workflow – Booking Approval

Manager Approve:

Your request to participate in the course &TRAINING.TRAININGNAME& has been approved by &APPROVINGUSEROBJECT.NAME&.

You can find more information about the course in the Learning Portal.

We wish you successful training!

Workflow – Booking Rejection

Your request to participate in the course #TRAINING.TRAININGNAME# has been rejected by #APPROVINGUSEROBJECT.NAME#.

Workflow – Booking Error

The workflow system was not able to book you automatically for the course &TRAINING.TRAININGNAME&.

You can register for the course again in the Learning Portal.

Alternatively, you can search for another course or course date. If this error occurs the next time you make a booking, please contact the training administrator.

Workflow – Booking Obsolete

The booking you requested for the course &TRAINING.TRAININGNAME& was cancelled.

If you are still interested in participating in the course, submit another participation request.

Workflow – Cancellation Request

Time and Location Dependent:

<H>Approval of Participation Cancellation</>

&PARTICIPATION.LEARNER.LEARNERNAME& requests cancellation of his/her booking for the course &PARTICIPATION.TRAINING.TRAININGNAME&.

You have until &FINALAPPROVALDATE& to approve or reject this request.

After this date, the booking will be cancelled automatically.

You can find further details about course participation in the attachments.

Choose one of the decision options given. This completes the processing for this step.

If you choose <H>Cancel</>, the user decision remains in your inbox for processing.

If you choose <H>Cancel</>, the user decision remains in your inbox for processing.

Workflow – Cancellation Request

Time and Location IN-Dependent:

&PARTICIPATION.LEARNER.LEARNERNAME& requests cancellation of his/her booking for the course &PARTICIPATION.TRAINING.TRAININGNAME&.

You can find details of the course participation in the attachments.

Choose one of the decision options given. This completes the processing for this step.

If you choose <H>Cancel</>, the user decision remains in your inbox for processing.

If you choose <H>Cancel</>, the user decision remains in your inbox for processing.

Workflow – Cancellation Approval

Auto Approve (once timeframe for approval has expired):

Your request to cancel your booking for the course #TRAINING.TRAININGNAME# was neither approved nor rejected up to #FINALAPPROVALDATE#.

The workflow system automatically cancelled the booking.

Workflow – Cancellation Approval

Manager Approve:

Your request to cancel your booking for the course
&TRAINING.TRAININGNAME& was approved by &APPROVINGUSEROBJECT.NAME&.
The booking has already been successfully cancelled.

Workflow – Cancellation Rejection

Your request to cancel your booking for the course
&TRAINING.TRAININGNAME& was rejected by &APPROVINGUSEROBJECT.NAME&.
You are still booked for the course.

Workflow – Cancellation Error

The workflow system was unable to automatically cancel your booking for the course &TRAINING.TRAININGNAME&.

Check in the Learning Portal whether the course booking still exists.

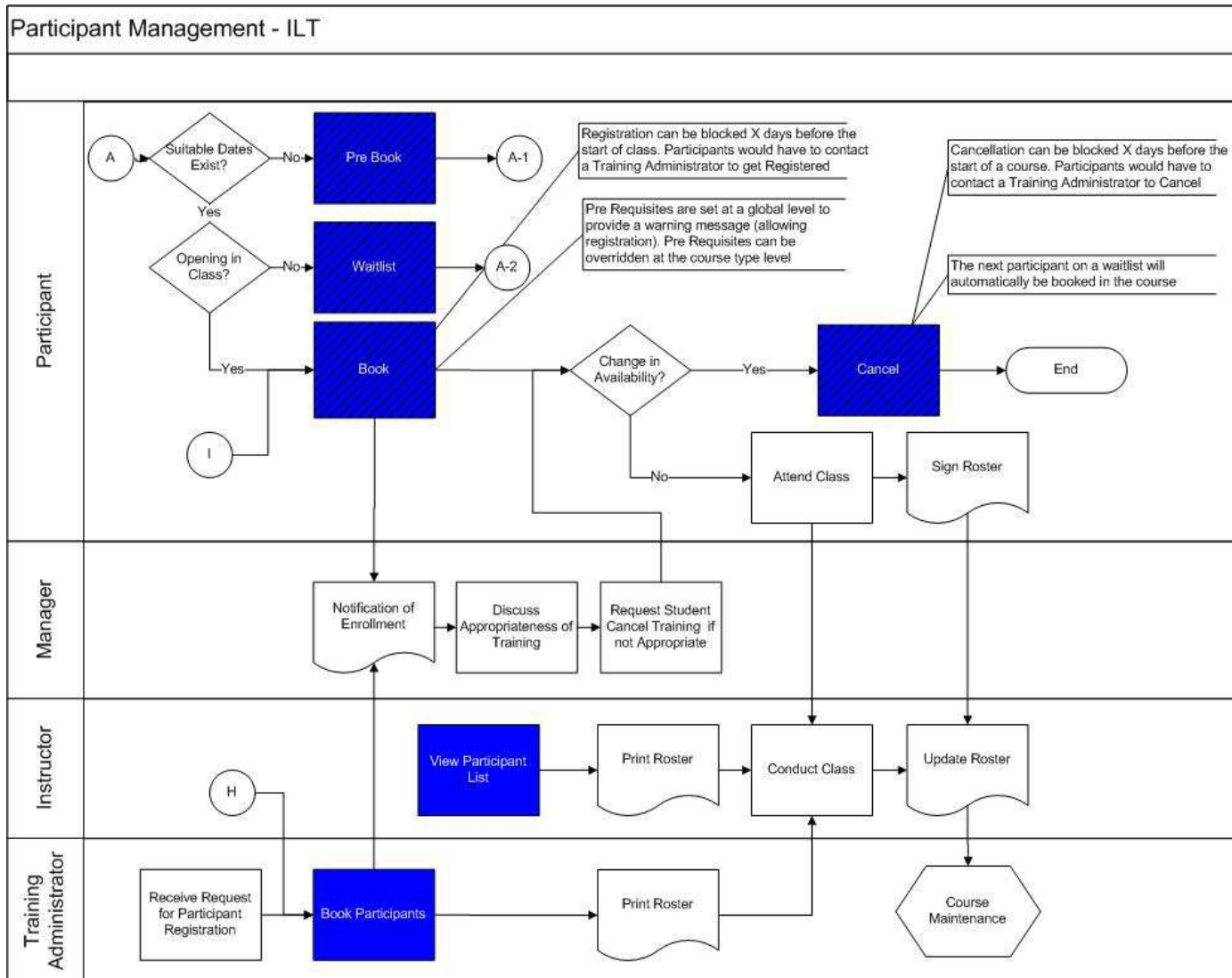
Contact the training administrator if you have any problems.

Workflow – Cancellation Obsolete

Your booking for the course #TRAINING.TRAININGNAME# was cancelled.



Process



Process Map

- Booking
- Rebooking
- Cancelling
- Replacing
- Reschedule
- Course Completion
- Correspondence

Wrap-up

- Validate Parking Lot Items



Questions



Thank you!



MAGIC Project WORKSHOP MINUTES/ HCM_EL_09 December 13th, 2011

PROJECT IDENTIFICATION		
Project Name MAGIC	CPI/Project Number	Project Type (CBI, Implementation, CSS, Upgrade, Internal, other) Implementation
Customer Name State of Mississippi	Customer Number 600260	Planned Start/Finish
SAP Customer Partner	Project Sponsor	Program Manager
SAP Project Director Bill Bevil	Customer Project Director Becky Thompson	Partner Project Manager

GENERAL INFORMATION	
Workshop Title	HCM_EL_09
Workshop Facilitators	Frank Hanfland, Susan Perry
Process Owner	
Scribe	Tom Reagan

ATTENDEES	
Name (including Role/Organization)	Agency
Julia Summers	MSPB
Bethany Nelson	MSPB
Susan McClain	ITS
Beverly Hinson	MMRS
Sheila Kearney	STA
Susan Perry	MMRS
Iris Griffin	MMRS
James White	MMRS
Ruby Walker	MDES
Pam Hemphill	MDES
Angela Armistead	MSDH
Michelle Mangum	MSDH
Jim Nelson, Jr.	MSPB
Skip King	MSPB
Leisa Wood	SAP
Frank Hanfland	SAP



SUMMARY OF THE MEETING (SAP)	REFERENCE DOCUMENTS FOR DETAILS REFER TO THE FOLLOWING BUSINESS PROCESS DESIGN DOCUMENT
Capacity planning is NOT required or in scope (can schedule in advance in regular intervals)	
Bookings (all to be discussed today); are using pre-requisite qualifications; on course level can change this attribute	
Lots of discussion on Suggested Cancellation (and other) reasons: No show – (c)harge; No show – (n)o charge; Failed test (c)harge; Participation incomplete (c)harge ; Only ITS charges if no shows or cancellations; User/Participation cancellation through the Portal; if cancel only go to the manager and employee	
Waitlist –everyone has a waitlist for all business owner agencies; first one signs up slides in; can cancel and rebook at a higher priority – SPB brought this up; can be overridden; can pick a location	
Follow/up course completion; what is the purpose of following up a course? Marks completion and transfers qualifications if you have those; allows you to process participation Question: Who does the follow up instructor or administrator? There is the instructor portal can do this; 99% of cases the administrator does it	
New booking; need to enter the roster into the system after class is delivered	
Standard delivered participant list is the roster SAP provides; includes participant + Org Assignment + signature; can save as a Winword document (Word)	
Course completion follow up imparts a qualification if there is one; follow up closes out the course – can't add anyone else after this; must establish qualifications and assign to the course type before you can impart a qualification; default of qualification which has a proficiency scale is middle of the range;	
Guideline for course program (CPM and others) – 12 months a warning, 18 months is the absolute; haven't done something if they haven't done it; reminder is generated as an email in MELMS; can impart qualifications for either 12 or 18 months and then generate an email notification; qualifications are set up accordingly; no emails are automatically generated; will be manual generated emails	
CPM – 1st csm → L1, L2, L3 – week long combination of classes; are signed up for the whole week; CSM do not count toward the 58 hours; CSM has 30 elected hours; book report; like activities; project – completion of the course is when the counter for elected hours start; what counts as the elected class – 1 week class of supervisor training (bsc – basic supervisor course); rules are on-line – SPB can provide these – rolling 1 year and the	



SUMMARY OF THE MEETING (SAP)	REFERENCE DOCUMENTS FOR DETAILS REFER TO THE FOLLOWING BUSINESS PROCESS DESIGN DOCUMENT
clock starts again; HRCP; ASCP – are separate programs – sounds like a curriculum like college; use the report Attendee qualifications report to segregate by person – must use Qualifications – SPB relevant; administrators would be managing these programs; will need a prototype – 1 hour meeting – will identify this as a demo prototype for Blueprint – is a TRIGGER COUNTER	
Correspondence Triggers – submitted a form to the participants from ITS	
Booking correspondence to the Learner – ; same letters to everybody – is a concern for participating agencies as they issue different correspondence; same text and is the same for everybody; will handle manually from an email template and copy email addresses from the system and insert into the email; james white doesn't think email clients will work – lotus, groupwise, outlook; only at the final approval; will rely on the learner to read the portal; don't send any emails for the correspondence;	
Discussion around workflow approvals – agency approver can be in a double pinned situation but we won't be concerned over this as the person who holds the approving position will be the one who gets the workflow, not the one shadowing;	
Who gets cancellation notices? No automatic email for participant cancellation	
Demoed the process of manually sending notification to participants	
Only ITS group does a lot of external training and they will handle provider notification manually.	
Demo of Portal	
Discussion about what is a qualification...	
Discussion about catalog sharing – Administrators will see same catalogs as participants	
If you want more than 0 and 100% then you need more SCO	

KEY DECISIONS ANSWERED (SAP/DISTRIBUTE AS MINUTES)	REFERENCE DOCUMENTS FOR DETAILS REFER TO THE FOLLOWING KEY DECISION DOCUMENT
No show/no charge; = failure;	
Change Instructor - No automatic notification Room Change - No automatic notification	
Decision: No certificates required, so no action item	
Decision: Manually send notification to participants when course is firmly booked.	



KEY DECISIONS ANSWERED (SAP/DISTRIBUTE AS MINUTES)	REFERENCE DOCUMENTS FOR DETAILS REFER TO THE FOLLOWING KEY DECISION DOCUMENT
Will need to manually print name tags	
Rebooking Course – No automatic notification required	
Pre-book Participation – No automatic notification required	
Decision: Will not turn on Audit log, last change user and date sufficient	
Remove course catalog list from ESS but keep link to course catalog	
Link to “my approvals requests” and “my transcript”, listing all courses, all statuses for a period of time.	
Rename Training activities to “Training History”	
For course pre-booking – keep only last 3 sentences.	
Will not use Learning Strategies	
Decision: Private course catalog name should be called “Agency Specific Catalog”	
My Training Activities becomes “My Current Training Activities”	
Rename Confirm Participation to “Complete Course” – Change text to “Once you complete the course you must click the button below”. “Complete Course” is the button.	
No automatic email for participant cancellation	
Course completion follow up imparts a qualification if there is one; follow up closes out the course – can’t add anyone else after this; must establish qualifications and assign to the course type before you can impart a qualification; default of qualification which has a proficiency scale is middle of the range;	
Who gets cancellation notices? No automatic email for participant cancellation	
Administrators will see same catalogs as participants	

ID	OCM IMPACT IDENTIFIED (STATE/DISTRIBUTE AS MINUTES)	AREA IMPACTED
01	Recommend to all employees to print their transcript before conversion.	
02		
03		
04		
05		



ID	ACTION/PARKING LOT ITEM (SAP)	OWNER	DUE DATE
PL-01	User cancellation through the Portal (days can vary by vendor) – need design as it would be custom; this is standard -- can follow up with the participant and attach the reason for course failed in the backend but the issue for parking lot item for user cancellation via the portal – this could be done manually according to ITS;	Susan Perry/ITS	
AI-01	If a class cancels: No standard automatic notice in SAP. <ul style="list-style-type: none"> Gap – Need automatic communication of class cancellation to participants and instructors. See GAP-01 Action Item - <u>Need wording of notice.</u> 	Susan Perry/Frank Hanfland	
AI-02	Decision required on historical data conversion of course completions including the catalogue of historical courses to support it.	Susan Perry/Frank Hanfland	
AI-03	Decision: Manually send notification to participants when course is firmly booked. <ul style="list-style-type: none"> Action Item – Need layout of “information about course.” 	Susan Perry/Frank Hanfland	

ID	GAPS IDENTIFIED (SAP/DISTRIBUTE AS MINUTES)	OWNER	DUE DATE
GAP-01	Custom infotype for user cancellation through the portal – x days before and if 0 always inactive; -- 40 to 60 hours (would include unit testing and development) – is A GAP; learner portal needs to be rewritten! Will need to remove the cancellation button for ITS and call her regarding what to do with the booking; ITS process is not to cancel; cancellations are manually triggered on the infotype and emails are generated; don't turn the button off but turn off cancellation functionality behind the scenes – can change button to cancel with fee; once infotype is populated, workflow is generated – field on infotype will capture the range of cancellation days – to/from; will be populated per course type;		
02			
03			
04			
05			