1.0   PROJECT PLAN

As the list of ▮▮▮ customers and employees grows, the current methodology using Caspio/manual tracking for maintaining records has become outdated (too labor intensive, and compliance needs are higher now with nuclear tool development). EPath, a web-based learning management system has been chosen for APS. To learn more, see this presentation: ▮▮▮▮▮▮▮▮▮▮▮▮WebLearning_PPT_DRAFT-FULL.pptx

> **NOTE:** Linking of reference documents on the customer area depends on the Modx project currently underway. Internal training will be rolled out first.

1.1   Project Scope

This DocPlan provides details on the proposed features and their implementation. See Section 6.0 for scope details.

PHASE I -

APS Employees (Learners)

- Current Intranet tracking will be replaced by ePath.
- Leaners will access ePath via an APS branded webpage (the campus).
- Learning paths, web-based access, Scorm (quiz grade tracking), auto-generated certificates
- Content on the Walinvent server may need to be migrated to FatCow or ePath.
- A formal training rollout is planned. The intranet's training page was not heavily marketed as it was not a complete solution.

Administrators and Trainers (Builders)

- A builder is an administrator/trainer who has access to their administration website. After our initial setup and onboarding, EPath allows us 1 hour of support for selected Administrators.
- Administrator(s) will be responsible for issuance to each User of the unique *user name* and passwords ("User ID"). It will also be the responsibility of the Administrator(s) to deactivate the User ID and terminate access when appropriate.

PHASE II

Customer (Learners)

- A phase II rollout will be defined and occur shortly after using ePath for internal training. Connections are established during Phase I because APS employees access the portal for learning as well.

2.0   DEPARTMENTAL IMPACTS

Phase I of this project development affects the following groups:

- **IT** - Impact is during the kickoff/initial setup to establish API connections with the ▮▮▮ website ▮▮▮▮▮▮▮▮▮▮ and Vantage (for the export of customer and ▮▮▮ employee data, & automatic updates for new/obsolete records).
- **Accounting** - Impact is during the kickoff/initial setup to define which information is needed for ePath reports (can be set up to run/email automatically) for sales order management billing and training hour tracking.

- **HR** - Training Administrator is the owner of the project and system. HR team to define policy and new hire and other training guidance, in addition to defining reporting needs.
- **Marketing** - Some minor impact during the kickoff/initial setup for API connection for single-sign on task; later additional impact when customer rollout occurs.
- **Quality** - Follow up on the CAPA for training by participating in the programs development.
- **Legal** - Review all content involving employment policies and/or employment practices and provide general guidelines to ensure all content is properly owned or otherwise licensed.

For Phase II, the Training admin will coordinate these activities:

- **All depts.** - Each Dept manager will be contacted to define an on-boarding/orientation info.
- **Houston FSEs** - Select individuals will be chosen to learn how to log a classroom session, and upload/manage their presentation materials that is, become Builders.
- **CJV** - Create builder accounts ███████████ and bring up training schedule
- **Dubai** - Create builder account (███████████)
- **Marketing/Engineering Admin** - Formal program to Rollout to customers

3.0   REQUIRED RESOURCES AND SUPPLIES

The following resources are required for Phase I of this project:

- **Marketing** – ██████████████████
- **DocMgt -** ███████████████
- **HR/Training** – █████████████████████████████
- **IT** - ████████████████████
- **QA** - ████████████
- **Engineering** - Phase II - ██████████
- **Houston & other Remote Trainers** - Phase II - ████████████████████████

4.0   TESTING AND MAINTENANCE

Testing is required before rolling out to APS and the customers (see Section 6.0) by both APS and ePath. The training administrator is responsible for overseeing the program's maintenance, and assisting/teaching learners and builders.

5.0   RISKS

Risks to this project include:

- A timing conflict with the Modx project which affects links for ePath.
- 5GB is not a lot of space for videos, but we can purchase additional blocks of space from ePath for $50/month. We can host on FatCow whenever possible for large content, which means all APS employees need customer site accounts.
- John can't move the Intranet server (Walinvent1) before implementation, so additional relinking will need to be done (expected to be minor impact).
- Potential move of Intranet to Sharepoint environment may require additional resources.
- If we cannot directly access current training on Walinvent server, it may need to move to ePath or FatCow.

6.0   DELIVERABLES, TASKS, AND MILESTONES

For current versions of this docplan, **DocPlan-006_Training_LMS.pdf**, and the Excel file, **DocPlan-006-epath_ActionPlan.xlsx**, see the Intranet's *Training* page.

TRAINING LEARNING MANAGEMENT SYSTEM -EPATH

APS TECHNOLOGY

Action Plan

Project Title: Epath LMS Rollout	DocPlan or Doc Request: TR-14-005; DOCPLAN-006	Plan Owner: J. Thomas	Create Date: 6/6/2014

Review/Project Team: HR (Melissa V, Maria P, Randy S), DocMgt (Dorothy, Doug, Liz), IT (J. Felizardo/M. Mucci/May M), Marketing (Brian S, Les Howe), Jean E, Sales Team for Customer info, Houston (Ron D, Ruslan Y), Accounting (Marie R, Sherry E), QA (Bill Gowrie, Victor Fonseca), Legal (Larry, Kristin), CJV (Rita S, Andrew), James Q, Ian (dubai) — Revision Date:

Core Objective: Drive the implementation of the new training learning management system (epath). The new Internet-based process replaces course content on the Intranet training page, will allow for better compliance tracking, and course presentation utilization across the globe.

Timeline: = Original Plan   x = Complete or Progress

	Action Steps	Owner (Lead is bold)	Milestone	Planned Dates MM/DD/YY	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Status (Past Due in Red)	Impact	Comments
1.0	Create Action plan; notify key players	J. Thomas		06/06/14						X									5/28 email out
a	Define fields in Epicor AND reporting needs for employee and customer so we know what to migrate into epath	Marie/Sherry Joan/Melissa																	6/6-Draft Action plan emailed; contact signature pending PO; 6/11-meeting invites sent
b	Custom fields - products for customers, FTP link?;	Marie/Sherry Joan/Melissa																	
c	Define user roles	Joan/Chris																	
2.0	IT Tasks	May/John/ Matt/epath																	
a	Provide May with Fat Cow support to make API connections	Brian/Les Howe/John																	
b	Create Vantage export files (customer, employee)	May																	
c	Create Vantage auto email notification of new customer with training requirement and new/obsolete employee	May																	
d	Single sign-on API for customers and APS employee	May/epath																	
e	Create user accounts in Modx for all APS employees	John/Matt/ May?																	
g	Create notification and process for adding New hires/obsoleting APS employees in Modx and epath	John/Matt/ May?																	
3.0	ePath Tasks	epath/Joan																	
a	Complete setup tasks, branding, etc.																		
b	Test import file for customers & employee data																		
c	Test report exporting to include imported records																		
d	Create Admin for CJV where we can hide customer training details																		
e	Migrate existing training course details & employee records from Caspio excel file																		
f	Test logins via email and ID for APS employees																		
g	Help migrate existing certs																		
h	Train builders																		
i	Set Password/Expiration to high, 60 days all people																		
j	See 2.9																		
4.0	Content	Joan / epath for ??																	
a	Test camtasia content for scorm	Joan																	
b	Snap scorm (prelim started)	Joan																	
c	New Hire learning path (Ethics, new hire page)	Joan																	
d	Connect in Carl's Engineering Guidelines when ready	Joan																	
e	Radiation Content & schedule	Randy																	
f	Migrate existing training programs; continue to use TRN number - create report for last No. used, include TRN-10007; TRN-10040	Joan/Epath																	
g	Migrate Safety Programs	Joan/Eric																	
h	Create test users - test email notifications; expirations, report billing, test accuracy	Joan																	
i	Create APS help - rollout instructions	Joan																	
j	Chose/create certificate- 2 signatures?	Joan/Epath																	
k	Re-create existing generic course survey questions	Joan/Epath																	
l	Define PHASE II - Begin customer content migration; engage FSEs and CJV	Joan																	Take trip to Houston 3or 4Q
5.0	Les Howe/Brian/Joan Tasks:																		
a	PHASE II: Create training LANDING page in Customer area with Les Howe that links to epath and describes training program. Joan to draft content & May to test link																		
b	see 2.a																		
c	see 7.a																		
6.0	Rollout Announcements & Followup	Promote the new content - features																	
a	Finalize Training Policy / complete CAPA	Joan/Maria/Victor																	
b	To employees	Joan (intranet)																	
c	To Sales - Legal - Accounting - for new contracts with Training - issue letter for client emails - confirmation letter from epath	Joan																	
d	Distribute SurveyMonkey 6 months out	Joan																	
7.0	Phase II - Customer Training Rollout																		

Figure 1: Initial Action Plan, 6/10/2014 (Full size PDF is attached to the DocPlan PDF for printing)

7.0   PROPOSED ACCESS PLAN

Figure 2 shows how employees and customers will access ePath.

In the customer area, we should have a single page where we can describe the core courses (MWD, RSM, etc.) and provide a link into ePath to either the catalog or home page. Customers can **login with an email account**.

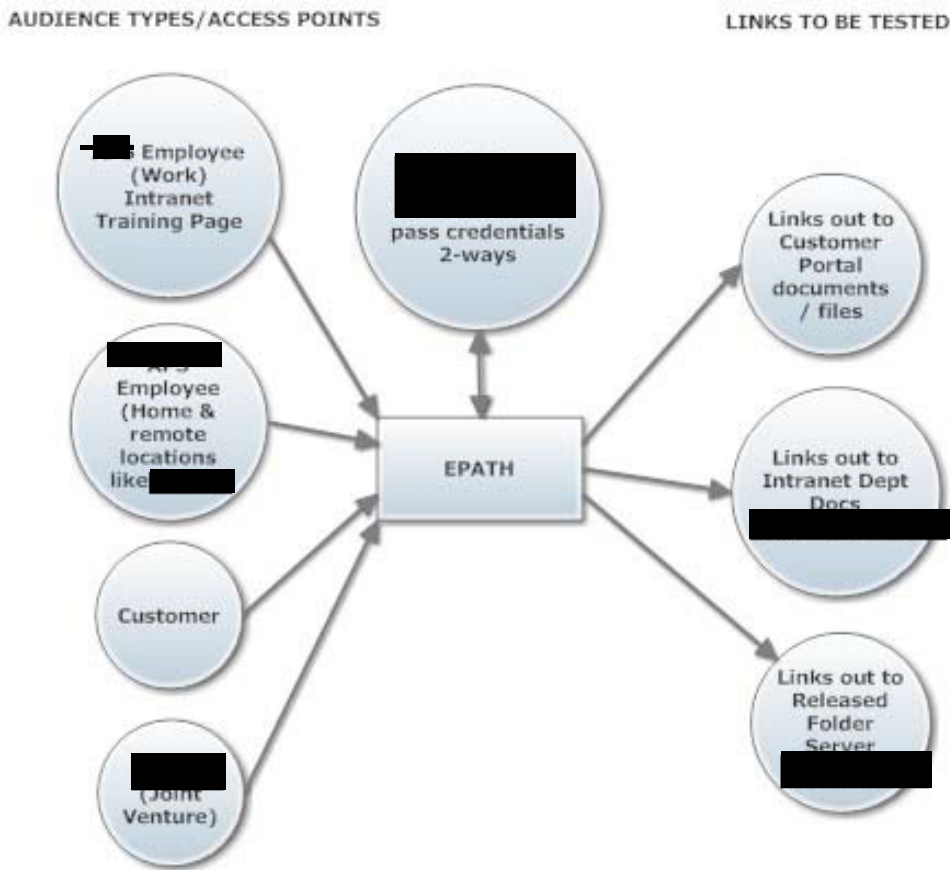██████ employees should be able **to login directly using either email or ID number**

AUDIENCE TYPES/ACCESS POINTS   LINKS TO BE TESTED

Figure 2: Proposed Method for EPath & Customer Area Access

8.0   DATA SYNC & REPORTING

To keep in sync with new/obsolete customers, jobs, employee data, auto notification & file export/import will be established.

During the kickoff meetings, input from Accounting, Quality, HR will be needed to determine custom fields for ePath to create effective reports using the standard reporting system.

REPORTING NEEDS   VANTAGE - EPICOR

Tentative list, ex:

employee name, ID #, email, dept, manager name, manager email, dept ID, dept description, employee status; comment

Job Code, Product, University setup

Filtered for only customers that have jobs with training specified: customer name & email, company name, company division name, company abbreviation, division abbreviation, sales rep name, sales rep email, region, due date, comments field, customer status
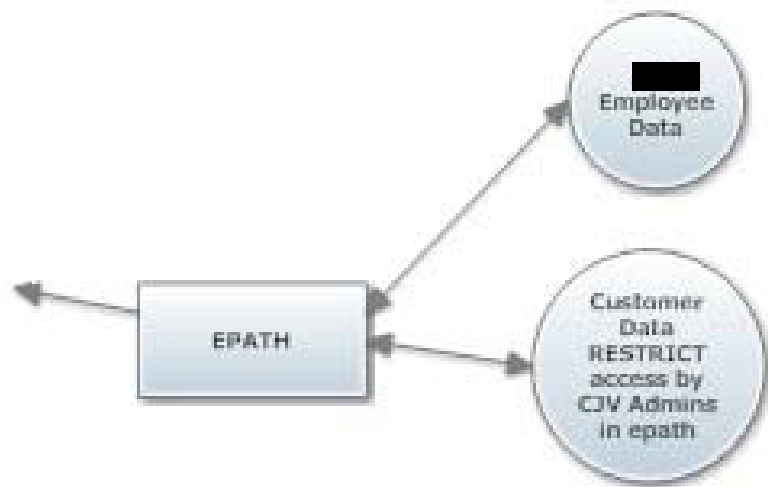
Figure 3: Proposed Connection to ▮▮ Databases

9.0   REVIEWED/APPROVED BY

This document has been sent via email for review/approval to:

NAME / INITIALS	DATE sent 6/6/2014	COMMENTS
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10.0 DOCUMENT REVISION HISTORY

Table 1: Documentation Revision History

Rev	Date	Completed By	Description	ECO No.	Checked By
A	06/06/2014	J. Thomas	Initial Release	N/A	J. Thomas
	06/10/2014	J. Thomas	Added titles and epath contacts	N/A	J. Thomas
B	06/11/2014	J. Thomas	Sections 1.1, 2.0, and 5.0 - incorporated comments from Michael/Kristin; Section 3.0, added remote trainers for Phase II; Section 6.0 - changed location of plans to the Intranet; Section 9.0 - updated review with attendees from kickoff meeting.	N/A	J. Thomas

Related Product Lines: Administrative