SAND2015-2997C

Exceptional service in the national interest

Sandia National Laboratories

Sandia's Conference Management Event Tracker Application

U.S. DEPARTMENT OF ENERGY

NNSA National Nuclear Security Administration

Sandia National Laboratories is a multi-program laboratory managed and operated by Sandia Corporation, a wholly owned subsidiary of Lockheed Martin Corporation, for the U.S. Department of Energy's National Nuclear Security Administration under contract DE-AC04-94AL85000. SAND NO. 2011-XXXXP

Event Tracker

Sandia
National
Laboratories

- Delivered in Feb 2014, web-based application developed for managing Sandia personnel's attendance at events (conferences, meetings, seminars, etc.)
- 8,233 Requests to attend 2,845 Events (Feb2014 to Mar2015)
- Problems we needed to solve:
  - Ensure compliance with DOE's stringent conference reporting and approval requirements
  - Transparency of event attendance details to management
  - Continue Sandia's engagement in the important exchange of information and collaboration that occur in scientific and professional conferences
  - Reduce the chaos

Project Background

- Technology: Custom developed Java application
- Database: Oracle
- Methodology: Agile development (Scrum) methodology
- Team Members: *(~3.5 FTE effort)*
    - 4 SW Developers
    - 1 QA Tester
    - 1 Project Manager
    - 1 Product Owner
    - Multiple Management/Stakeholders

Key Terms/Acronyms

- **Event Tracker (ET)**

- **Conference Management (CM)** *~3 individuals*

  The team in Treasury and Travel responsible for aligning Sandia's CM process with DOE requirements. CM provides policy, process, and infrastructure support for Sandia.

- **Conference Portfolio Owner (CPO)** *~34 individuals*

  The individual responsible for the oversight and management of Events within a given technical area, called a Conference Category. Other related/supporting roles:

    - Deputy CPO *~20 individuals*
    - Event Owner (EO) *~81 individuals*
    - Authorized Viewer *~24 individuals*

- **iPortal**

  DOE's complex-wide Conference Management system. Requests must be entered by CM into iPortal before they can be approved. The data from iPortal (event title, DOE estimate, sponsor, etc.) is uploaded into ET nightly.

Key Terms/Acronyms - con't

- **DOE Estimate**

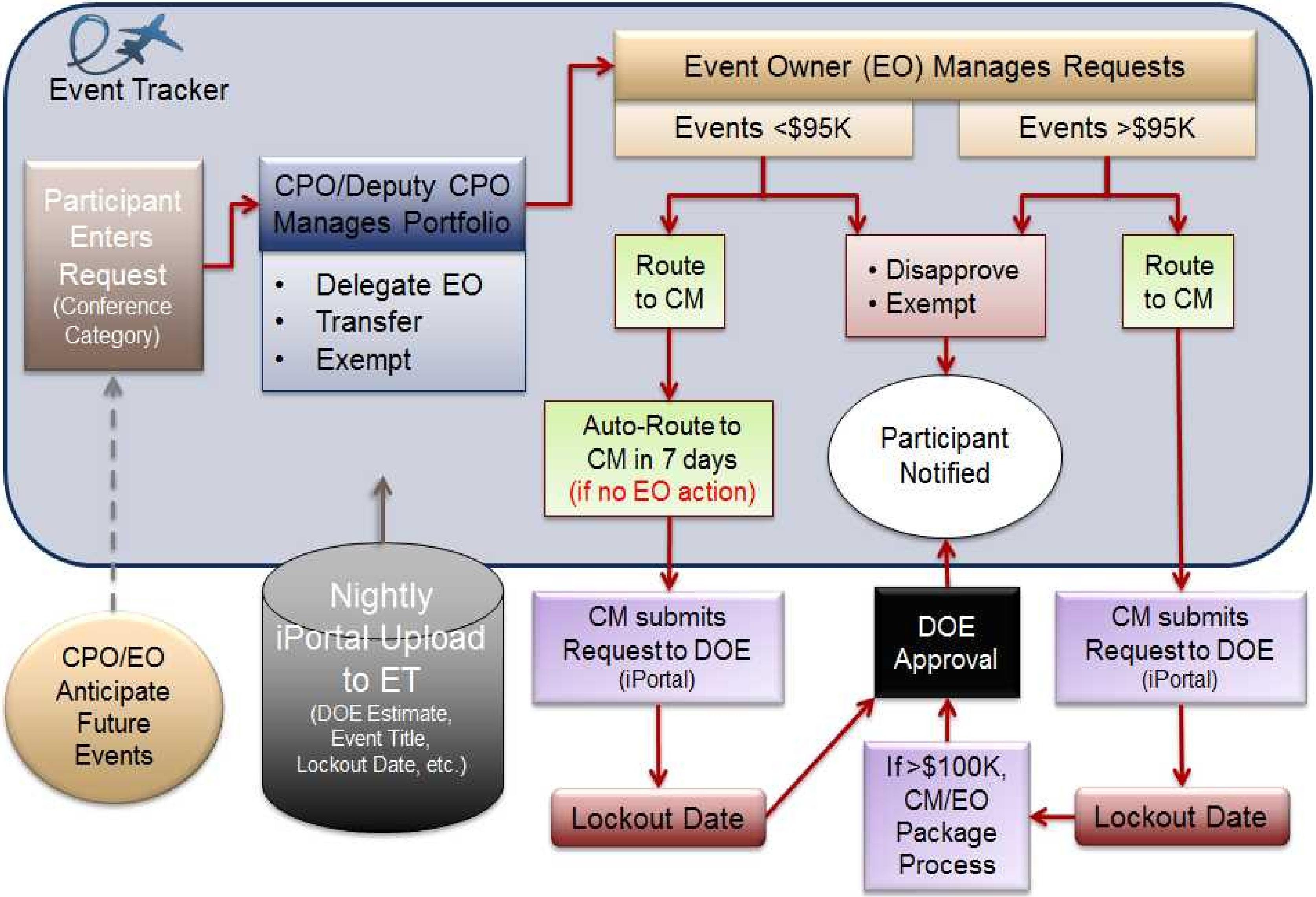
  The total estimated cost for an Event across all DOE sites. If the **DOE Estimate** is greater than $100,000, attendance to the event is limited and more rigorous approval process is required, called the **Package Process**.

- **Lockout Date**

  Established by DOE and comes from iPortal. For events over $100K, the **Package Process** begins after this date. For events less than $100K, approval can be sent to participants after this date.

- Participants submit a **REQUEST** to attend an **EVENT**.

Process Flow



Event Tracker

Participant Enters Request (Conference Category)

CPO/Deputy CPO Manages Portfolio

- Delegate EO
- Transfer
- Exempt

Event Owner (EO) Manages Requests

Events <$95K

Events >$95K

Route to CM

- Disapprove
- Exempt

Route to CM

Auto-Route to CM in 7 days (if no EO action)

Participant Notified

CPO/EO Anticipate Future Events

Nightly iPortal Upload to ET (DOE Estimate, Event Title, Lockout Date, etc.)

CM submits Request to DOE (iPortal)

DOE Approval

CM submits Request to DOE (iPortal)

Lockout Date

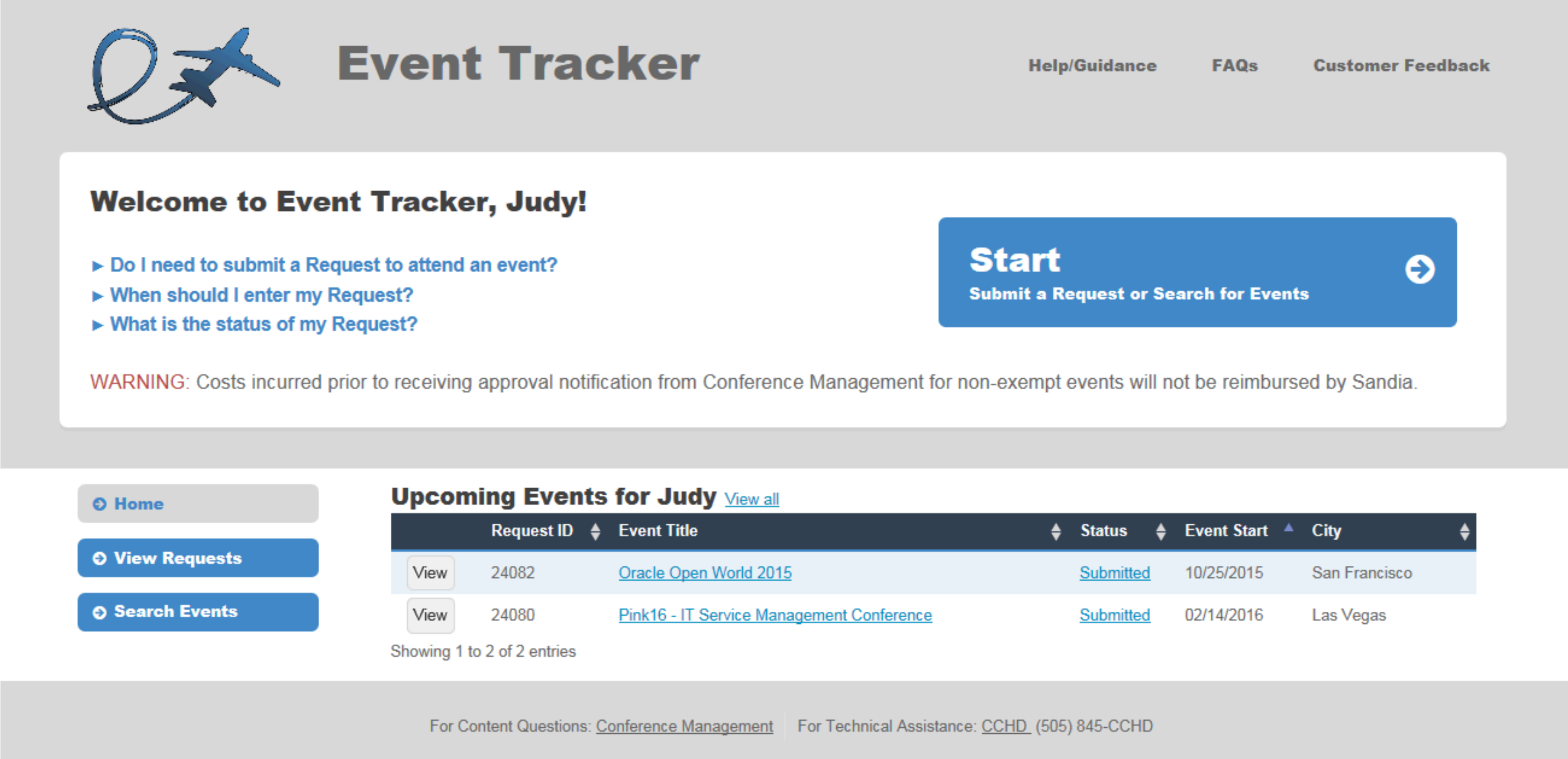
If >$100K, CM/EO Package Process

Lockout Date

Participant Enters Request (Conference Category)

Home Page

Sandia National Laboratories


Help/Guidance
FAQs
Customer Feedback
Home
View Requests
Search Events
View
Start
Submit a Request or Search for Events

Event Tracker

Welcome to Event Tracker, Judy!

- ▶ Do I need to submit a Request to attend an event?
- ▶ When should I enter my Request?
- ▶ What is the status of my Request?

WARNING: Costs incurred prior to receiving approval notification from Conference Management for non-exempt events will not be reimbursed by Sandia.

Upcoming Events for Judy View all

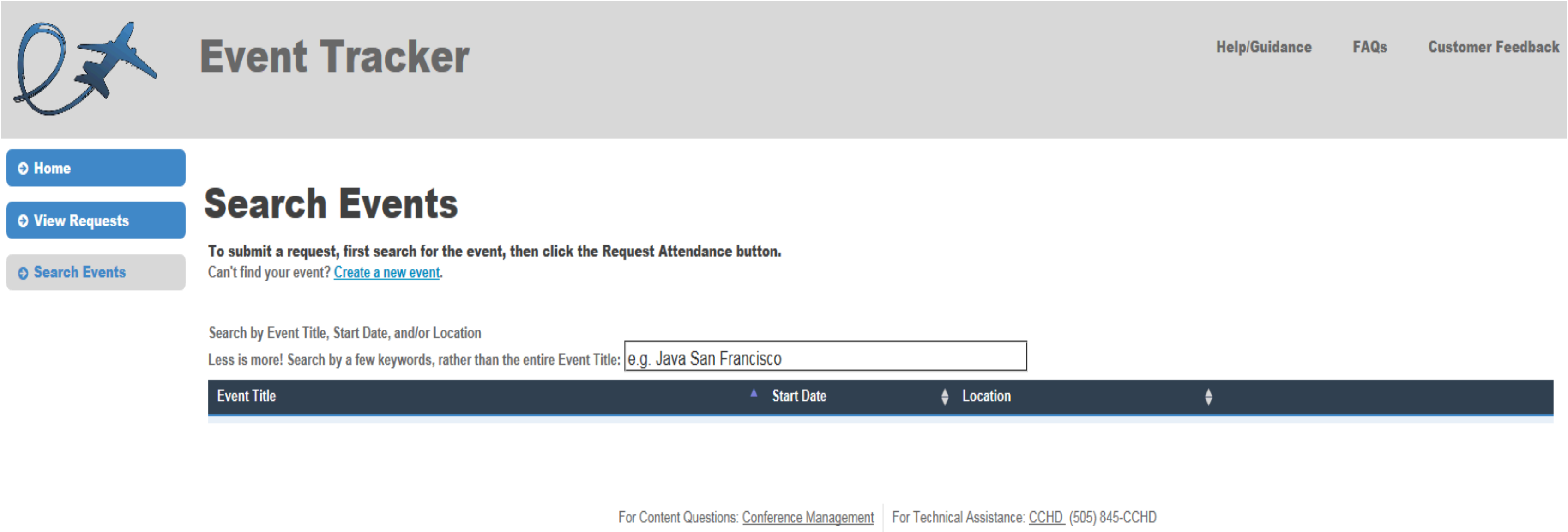
	Request ID	Event Title	Status	Event Start	City
View	24082	Oracle Open World 2015	Submitted	10/25/2015	San Francisco
View	24080	Pink16 - IT Service Management Conference	Submitted	02/14/2016	Las Vegas

Showing 1 to 2 of 2 entries

For Content Questions: Conference Management For Technical Assistance: CCHD (505) 845-CCHD

Participant Enters Request (Conference Category)

Search Events


Event Tracker
Help/Guidance
FAQs
Customer Feedback
Home
View Requests
Search Events

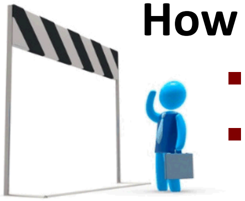
Search Events

To submit a request, first search for the event, then click the Request Attendance button.
Can't find your event? Create a new event.

Search by Event Title, Start Date, and/or Location
Less is more! Search by a few keywords, rather than the entire Event Title: e.g. Java San Francisco

Event Title	Start Date	Location

For Content Questions: Conference Management | For Technical Assistance: CCHD (505) 845-CCHD



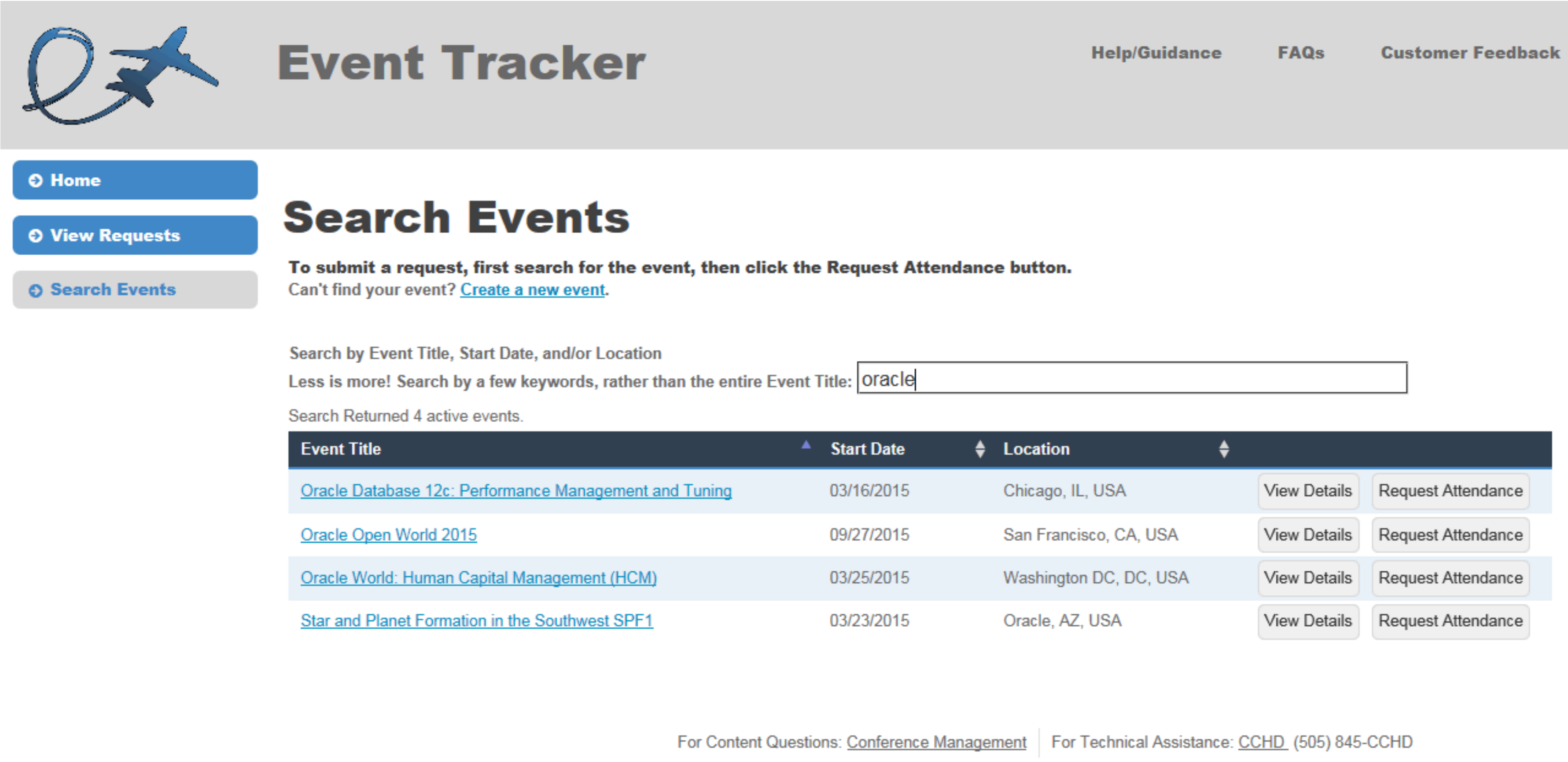
How can we help users FIND the event & reduce duplicate events?

- Search by Event Title, Start Date and Location
- Prevent ‘create a new event’ until user has searched first, reducing duplicate events

Participant Enters Request (Conference Category)

Search Results

Sandia National Laboratories



Search Events

To submit a request, first search for the event, then click the Request Attendance button.
Can't find your event? Create a new event.

Search by Event Title, Start Date, and/or Location
Less is more! Search by a few keywords, rather than the entire Event Title: oracle

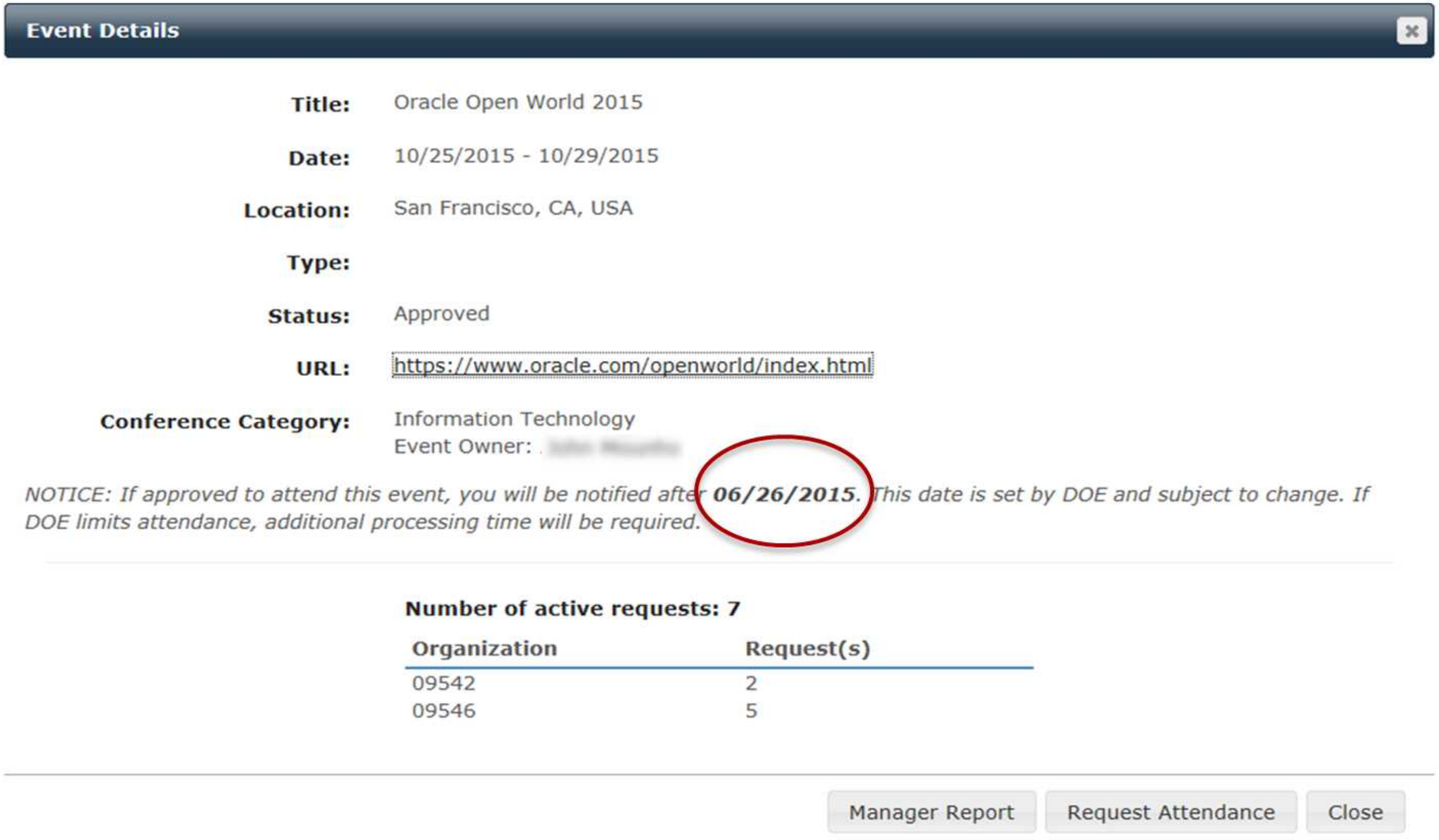
Search Returned 4 active events.

Event Title	Start Date	Location		
Oracle Database 12c: Performance Management and Tuning	03/16/2015	Chicago, IL, USA	View Details	Request Attendance
Oracle Open World 2015	09/27/2015	San Francisco, CA, USA	View Details	Request Attendance
Oracle World: Human Capital Management (HCM)	03/25/2015	Washington DC, DC, USA	View Details	Request Attendance
Star and Planet Formation in the Southwest SPF1	03/23/2015	Oracle, AZ, USA	View Details	Request Attendance

For Content Questions: Conference Management | For Technical Assistance: CCHD (505) 845-CCHD

Participant Enters Request (Conference Category)

View Details



Event Details

Title: Oracle Open World 2015

Date: 10/25/2015 - 10/29/2015

Location: San Francisco, CA, USA

Type:

Status: Approved

URL: https://www.oracle.com/openworld/index.html

Conference Category: Information Technology
Event Owner: [redacted]

NOTICE: If approved to attend this event, you will be notified after ***06/26/2015****. This date is set by DOE and subject to change. If DOE limits attendance, additional processing time will be required.*

Number of active requests: 7

Organization	Request(s)
09542	2
09546	5

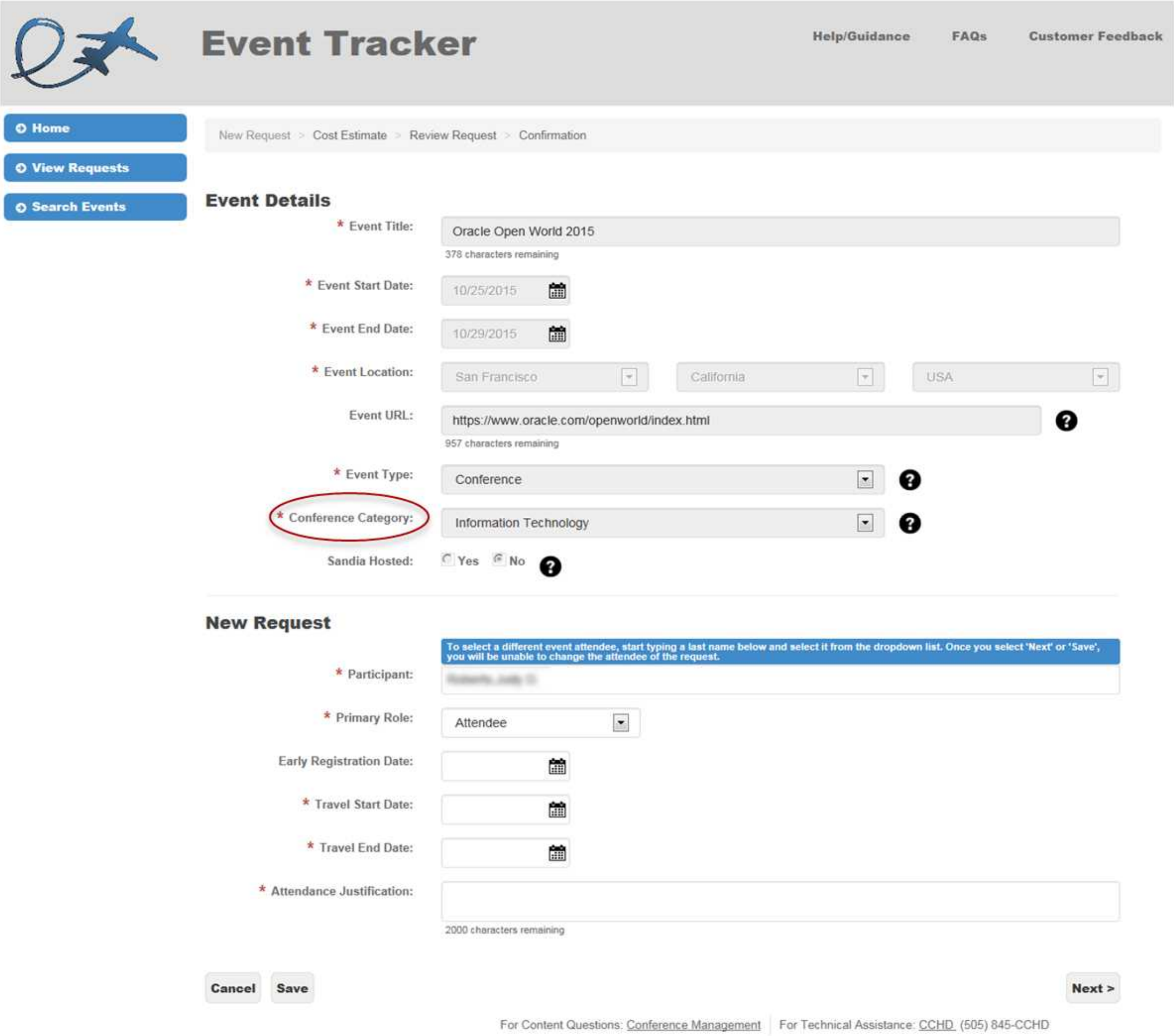
Manager Report
Request Attendance
Close

Manage user expectations about timeframe for approval

- Include Lockout Date and note in Event Details pop-up
- Repeat Lockout Date note in email notification

Participant Enters Request (Conference Category)

Request Attendance


Event Tracker
Help/Guidance
FAQs
Customer Feedback
Home
View Requests
Search Events
New Request > Cost Estimate > Review Request > Confirmation
Cancel
Save
Next >

Event Details

* Event Title:	Oracle Open World 2015 378 characters remaining
* Event Start Date:	10/25/2015
* Event End Date:	10/29/2015
* Event Location:	San Francisco California USA
Event URL:	https://www.oracle.com/openworld/index.html 957 characters remaining
* Event Type:	Conference
* Conference Category:	Information Technology
Sandia Hosted:	○ Yes ● No

New Request

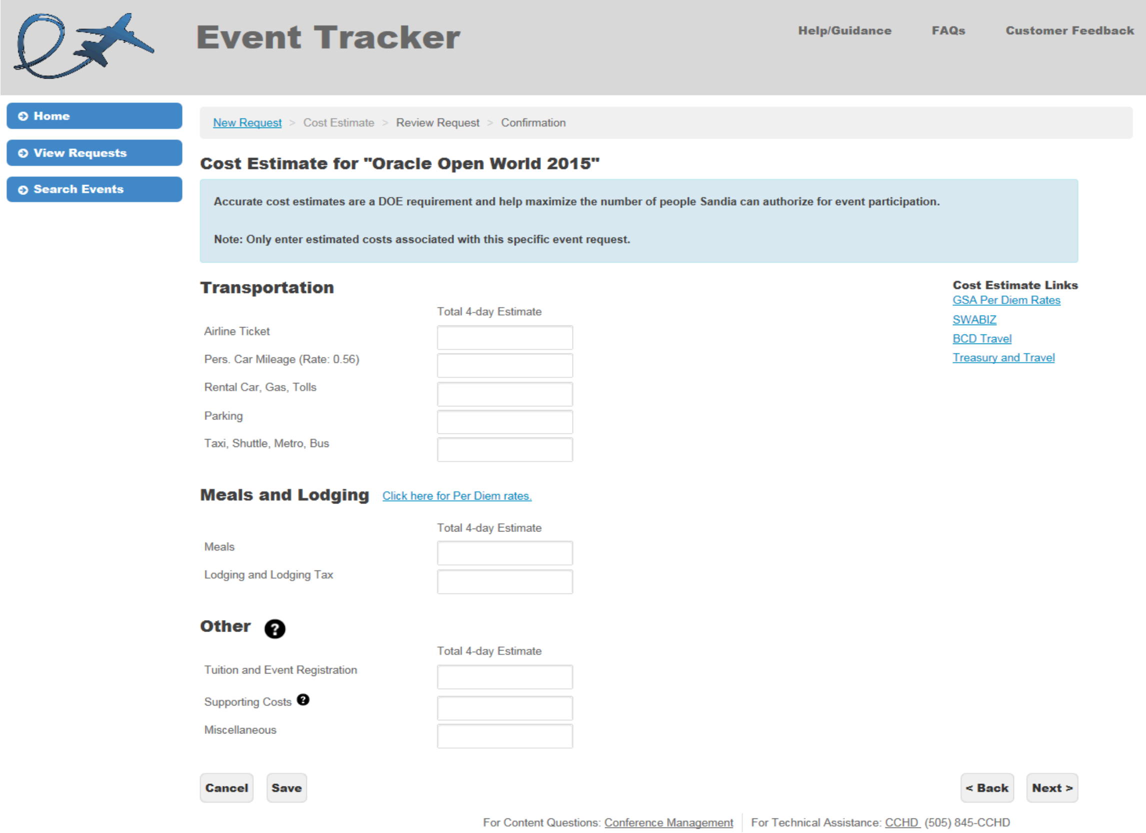
To select a different event attendee, start typing a last name below and select it from the dropdown list. Once you select 'Next' or 'Save', you will be unable to change the attendee of the request.

* Participant:	[redacted]
* Primary Role:	Attendee
Early Registration Date:	
* Travel Start Date:	
* Travel End Date:	
* Attendance Justification:	2000 characters remaining

For Content Questions: Conference Management | For Technical Assistance: CCHD (505) 845-CCHD

Participant Enters Request (Conference Category)

Cost Estimate


Event Tracker
Help/Guidance
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Home
View Requests
Search Events
New Request > Cost Estimate > Review Request > Confirmation
Cancel
Save
< Back
Next >

Cost Estimate for "Oracle Open World 2015"

Accurate cost estimates are a DOE requirement and help maximize the number of people Sandia can authorize for event participation.

Note: Only enter estimated costs associated with this specific event request.

Transportation

	Total 4-day Estimate
Airline Ticket	
Pers. Car Mileage (Rate: 0.56)	
Rental Car, Gas, Tolls	
Parking	
Taxi, Shuttle, Metro, Bus	

Meals and Lodging Click here for Per Diem rates.

	Total 4-day Estimate
Meals	
Lodging and Lodging Tax	

Other ?

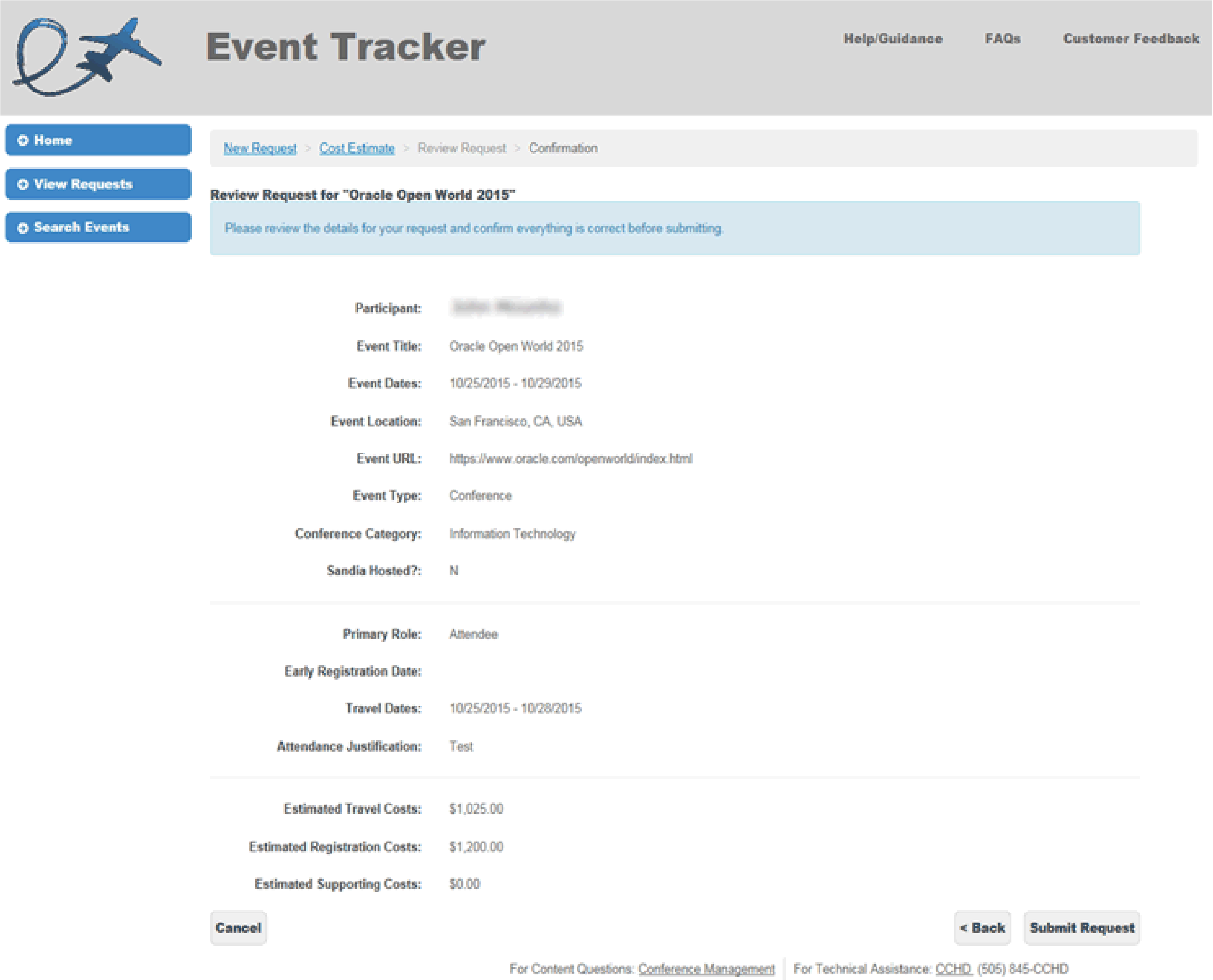
	Total 4-day Estimate
Tuition and Event Registration	
Supporting Costs ?	
Miscellaneous	

Cost Estimate Links
GSA Per Diem Rates
SWABIZ
BCD Travel
Treasury and Travel

For Content Questions: Conference Management | For Technical Assistance: CCHD (505) 845-CCHD

Participant Enters Request (Conference Category)

Review


Event Tracker
Help/Guidance
FAQs
Customer Feedback
Home
View Requests
Search Events
New Request > Cost Estimate > Review Request > Confirmation
Cancel
< Back
Submit Request

Review Request for "Oracle Open World 2015"

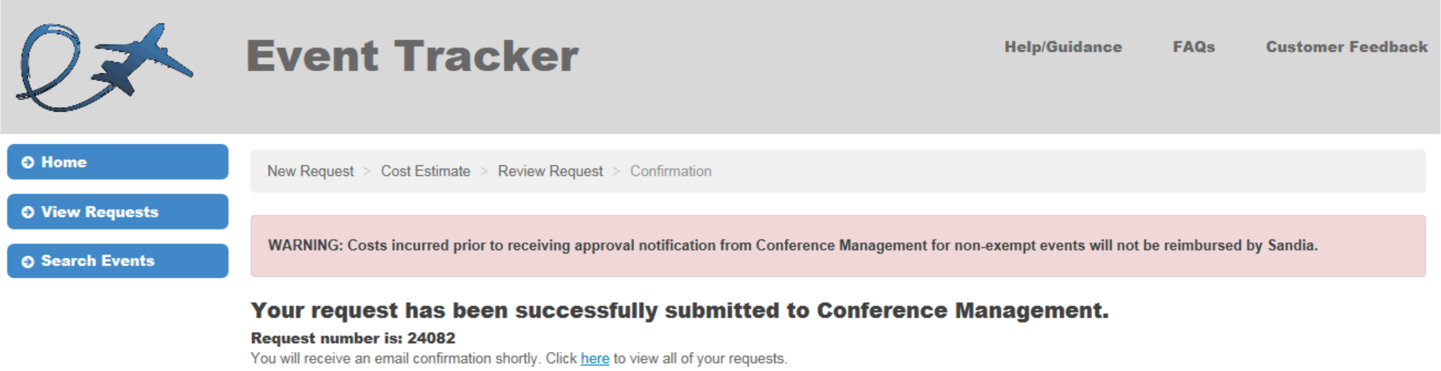
Please review the details for your request and confirm everything is correct before submitting.

Participant:	[redacted]
Event Title:	Oracle Open World 2015
Event Dates:	10/25/2015 - 10/29/2015
Event Location:	San Francisco, CA, USA
Event URL:	https://www.oracle.com/openworld/index.html
Event Type:	Conference
Conference Category:	Information Technology
Sandia Hosted?:	N
Primary Role:	Attendee
Early Registration Date:	
Travel Dates:	10/25/2015 - 10/28/2015
Attendance Justification:	Test
Estimated Travel Costs:	$1,025.00
Estimated Registration Costs:	$1,200.00
Estimated Supporting Costs:	$0.00

For Content Questions: Conference Management | For Technical Assistance: CCHD (505) 845-CCHD

Participant Enters Request (Conference Category)

Confirmation

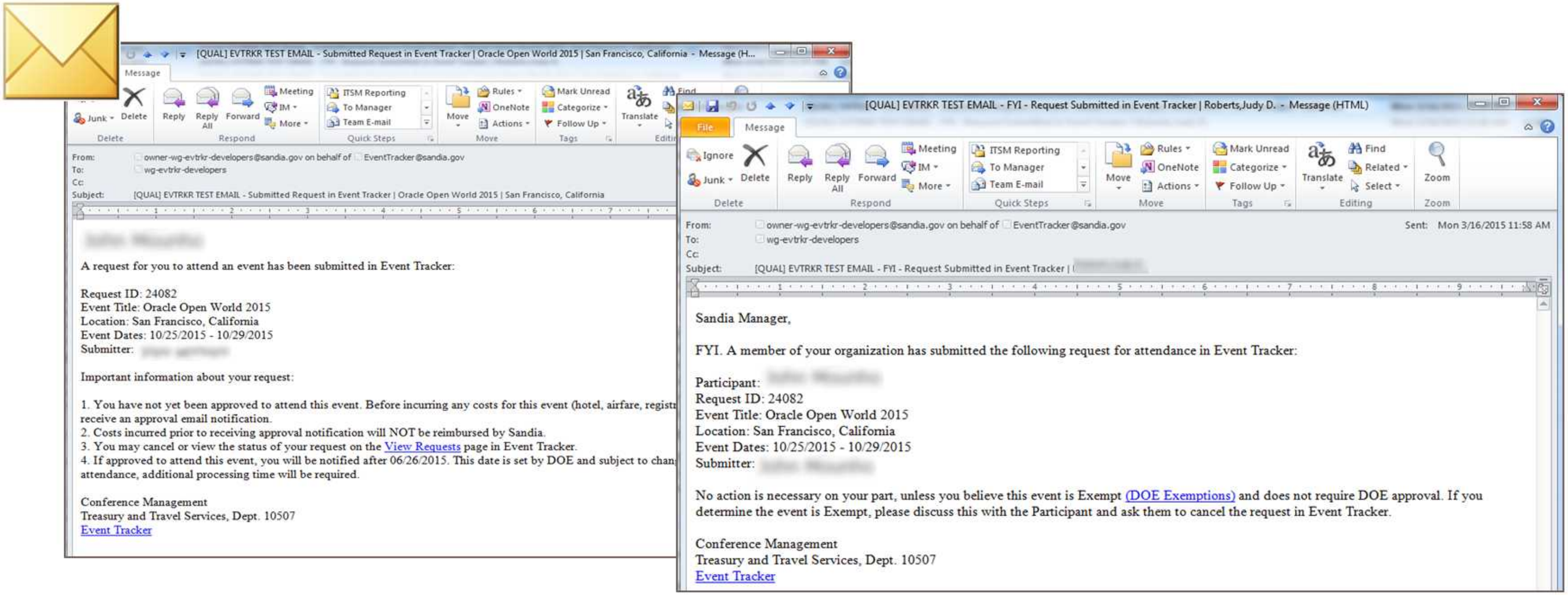

Event Tracker
Help/Guidance
FAQs
Customer Feedback
Home
View Requests
Search Events
New Request > Cost Estimate > Review Request > Confirmation

WARNING: Costs incurred prior to receiving approval notification from Conference Management for non-exempt events will not be reimbursed by Sandia.

Your request has been successfully submitted to Conference Management.

Request number is: 24082

You will receive an email confirmation shortly. Click here to view all of your requests.


[QUAL] EVTRKR TEST EMAIL - Submitted Request in Event Tracker | Oracle Open World 2015 | San Francisco, California - Message (H...
Message
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
ITSM Reporting
To Manager
Team E-mail
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Translate
Find
Delete
Respond
Quick Steps
Move
Tags
Editing

From: owner-wg-evtrkr-developers@sandia.gov on behalf of EventTracker@sandia.gov
To: wg-evtrkr-developers
Cc:
Subject: [QUAL] EVTRKR TEST EMAIL - Submitted Request in Event Tracker | Oracle Open World 2015 | San Francisco, California

[redacted]

A request for you to attend an event has been submitted in Event Tracker:

Request ID: 24082
Event Title: Oracle Open World 2015
Location: San Francisco, California
Event Dates: 10/25/2015 - 10/29/2015
Submitter: [redacted]

Important information about your request:

1. You have not yet been approved to attend this event. Before incurring any costs for this event (hotel, airfare, registr
receive an approval email notification.
2. Costs incurred prior to receiving approval notification will NOT be reimbursed by Sandia.
3. You may cancel or view the status of your request on the View Requests page in Event Tracker.
4. If approved to attend this event, you will be notified after 06/26/2015. This date is set by DOE and subject to chan
attendance, additional processing time will be required.

Conference Management
Treasury and Travel Services, Dept. 10507
Event Tracker

[QUAL] EVTRKR TEST EMAIL - FYI - Request Submitted in Event Tracker | Roberts,Judy D. - Message (HTML)
File
Message
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
ITSM Reporting
To Manager
Team E-mail
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Translate
Find
Related
Select
Zoom
Delete
Respond
Quick Steps
Move
Tags
Editing
Zoom

From: owner-wg-evtrkr-developers@sandia.gov on behalf of EventTracker@sandia.gov
Sent: Mon 3/16/2015 11:58 AM
To: wg-evtrkr-developers
Cc:
Subject: [QUAL] EVTRKR TEST EMAIL - FYI - Request Submitted in Event Tracker | [redacted]

Sandia Manager,

FYI. A member of your organization has submitted the following request for attendance in Event Tracker:

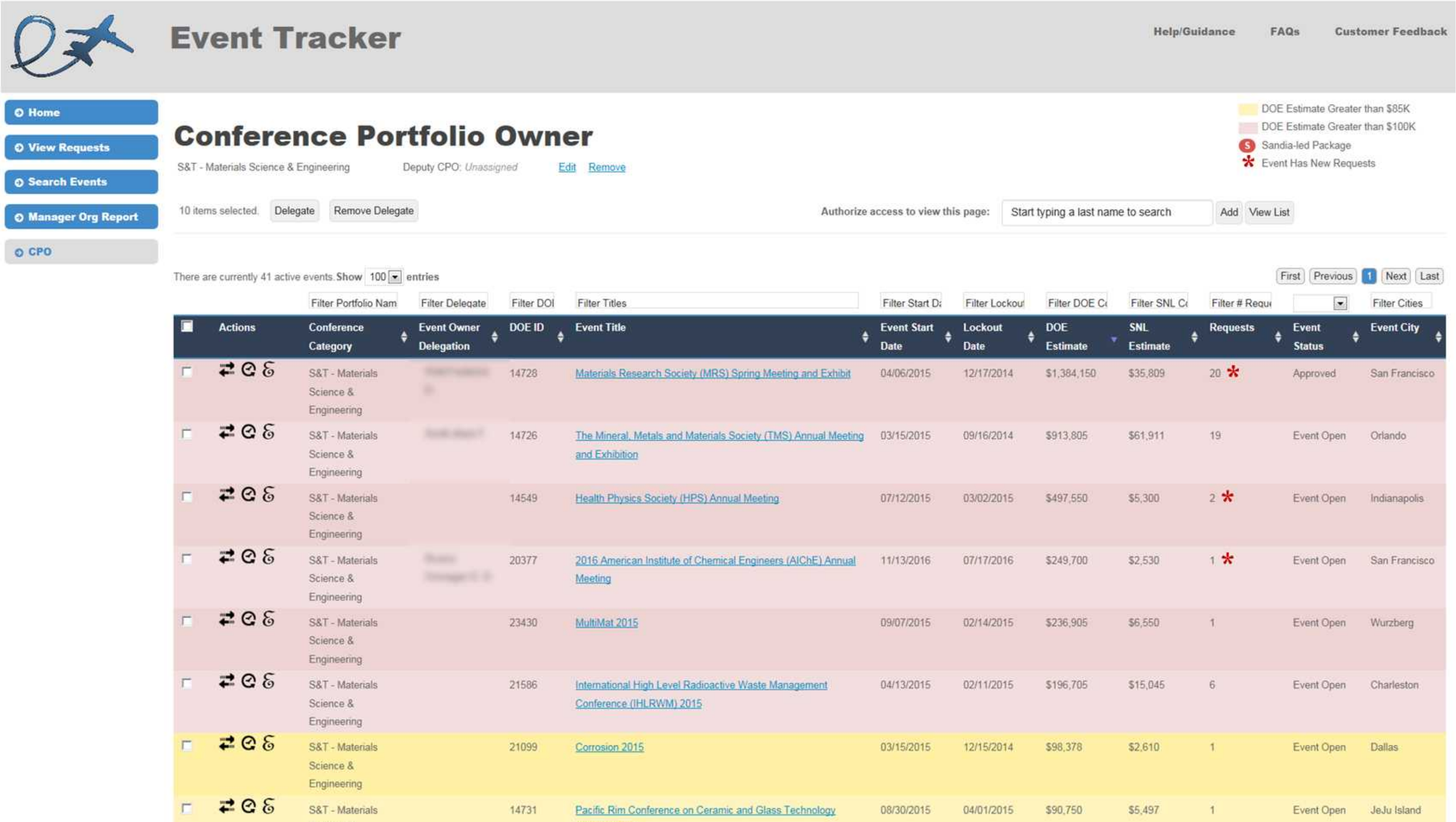
Participant: [redacted]
Request ID: 24082
Event Title: Oracle Open World 2015
Location: San Francisco, California
Event Dates: 10/25/2015 - 10/29/2015
Submitter: [redacted]

No action is necessary on your part, unless you believe this event is Exempt (DOE Exemptions) and does not require DOE approval. If you determine the event is Exempt, please discuss this with the Participant and ask them to cancel the request in Event Tracker.

Conference Management
Treasury and Travel Services, Dept. 10507
Event Tracker

CPO/Deputy CPO Manages Portfolio

Conference Portfolio Owner



Conference Portfolio Owner

S&T - Materials Science & Engineering   Deputy CPO: *Unassigned*   Edit Remove

🟨 DOE Estimate Greater than $85K
🟥 DOE Estimate Greater than $100K
S Sandia-led Package
* Event Has New Requests

10 items selected. Delegate Remove Delegate

Authorize access to view this page: Start typing a last name to search Add View List

There are currently 41 active events. Show 100 entries

First Previous 1 Next Last

☐	Actions	Conference Category	Event Owner Delegation	DOE ID	Event Title	Event Start Date	Lockout Date	DOE Estimate	SNL Estimate	Requests	Event Status	Event City
		Filter Portfolio Nam	Filter Delegate	Filter DOI	Filter Titles	Filter Start D:	Filter Lockout	Filter DOE C	Filter SNL C	Filter # Requ		Filter Cities
☐	⇄ ◷ &	S&T - Materials Science & Engineering	[redacted]	14728	Materials Research Society (MRS) Spring Meeting and Exhibit	04/06/2015	12/17/2014	$1,384,150	$35,809	20 *	Approved	San Francisco
☐	⇄ ◷ &	S&T - Materials Science & Engineering	[redacted]	14726	The Mineral, Metals and Materials Society (TMS) Annual Meeting and Exhibition	03/15/2015	09/16/2014	$913,805	$61,911	19	Event Open	Orlando
☐	⇄ ◷ &	S&T - Materials Science & Engineering		14549	Health Physics Society (HPS) Annual Meeting	07/12/2015	03/02/2015	$497,550	$5,300	2 *	Event Open	Indianapolis
☐	⇄ ◷ &	S&T - Materials Science & Engineering	[redacted]	20377	2016 American Institute of Chemical Engineers (AIChE) Annual Meeting	11/13/2016	07/17/2016	$249,700	$2,530	1 *	Event Open	San Francisco
☐	⇄ ◷ &	S&T - Materials Science & Engineering		23430	MultiMat 2015	09/07/2015	02/14/2015	$236,905	$6,550	1	Event Open	Wurzberg
☐	⇄ ◷ &	S&T - Materials Science & Engineering		21586	International High Level Radioactive Waste Management Conference (IHLRWM) 2015	04/13/2015	02/11/2015	$196,705	$15,045	6	Event Open	Charleston
☐	⇄ ◷ &	S&T - Materials Science & Engineering		21099	Corrosion 2015	03/15/2015	12/15/2014	$98,378	$2,610	1	Event Open	Dallas
☐	⇄ ◷ &	S&T - Materials		14731	Pacific Rim Conference on Ceramic and Glass Technology	08/30/2015	04/01/2015	$90,750	$5,497	1	Event Open	JeJu Island

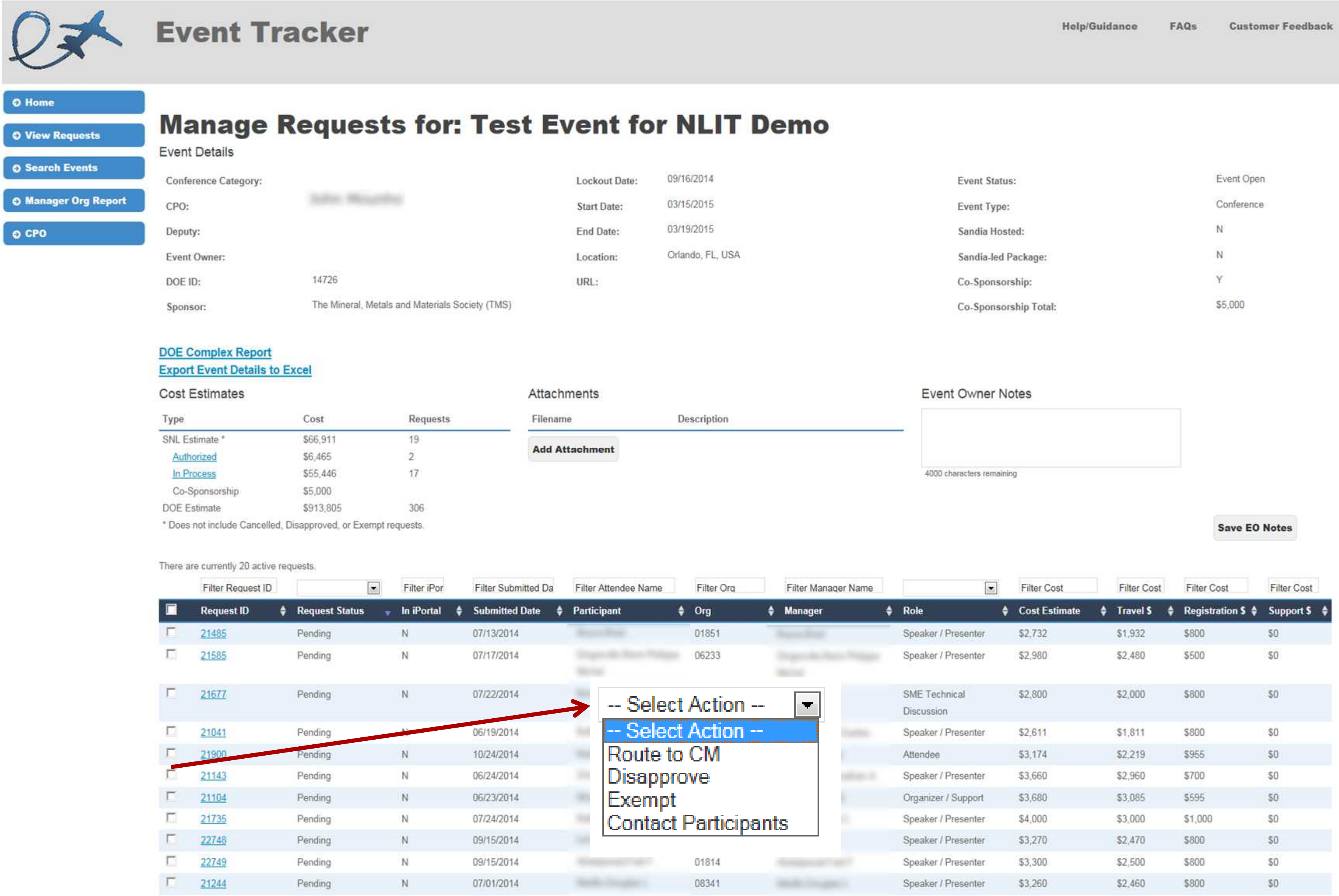
Cultural shift for CPO

- Supporting roles - **Deputy CPO** and **Authorized Viewer**
- Events with highest DOE Estimate appear on top of grid
- Red asterisk indicates Events with actionable requests
- Email notifications for action items

Event Owner (EO) Manages Requests

Manage Requests

Sandia National Laboratories



Manage Requests for: Test Event for NLIT Demo

Event Details

Conference Category:		Lockout Date:	09/16/2014	Event Status:	Event Open
CPO:	[redacted]	Start Date:	03/15/2015	Event Type:	Conference
Deputy:		End Date:	03/19/2015	Sandia Hosted:	N
Event Owner:		Location:	Orlando, FL, USA	Sandia-led Package:	N
DOE ID:	14726	URL:		Co-Sponsorship:	Y
Sponsor:	The Mineral, Metals and Materials Society (TMS)			Co-Sponsorship Total:	$5,000

DOE Complex Report
Export Event Details to Excel

Cost Estimates

Type	Cost	Requests
SNL Estimate *	$66,911	19
Authorized	$6,465	2
In Process	$55,446	17
Co-Sponsorship	$5,000	
DOE Estimate	$913,805	306

* Does not include Cancelled, Disapproved, or Exempt requests.

Attachments

Filename	Description

Event Owner Notes

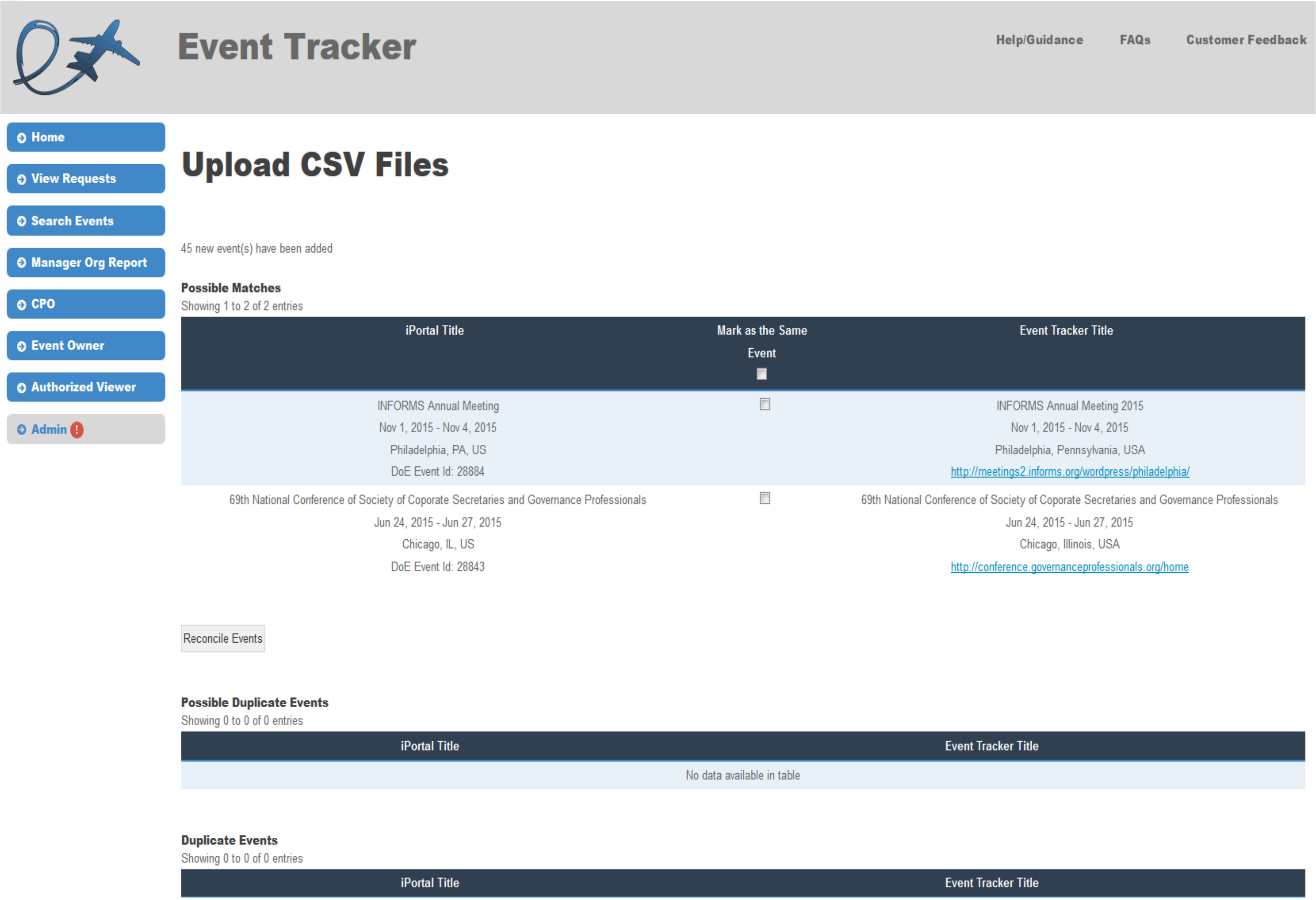
4000 characters remaining

There are currently 20 active requests.

☐	Request ID	Request Status	In iPortal	Submitted Date	Participant	Org	Manager	Role	Cost Estimate	Travel $	Registration $	Support $
	Filter Request ID		Filter iPor	Filter Submitted Da	Filter Attendee Name	Filter Org	Filter Manager Name		Filter Cost	Filter Cost	Filter Cost	Filter Cost
☐	21485	Pending	N	07/13/2014	[redacted]	01851	[redacted]	Speaker / Presenter	$2,732	$1,932	$800	$0
☐	21585	Pending	N	07/17/2014	[redacted]	06233	[redacted]	Speaker / Presenter	$2,980	$2,480	$500	$0
☐	21677	Pending	N	07/22/2014	[redacted]			SME Technical Discussion	$2,800	$2,000	$800	$0
☐	21041	Pending	N	06/19/2014	[redacted]		[redacted]	Speaker / Presenter	$2,611	$1,811	$800	$0
☐	21900	Pending	N	10/24/2014	[redacted]		[redacted]	Attendee	$3,174	$2,219	$955	$0
☐	21143	Pending	N	06/24/2014	[redacted]		[redacted]	Speaker / Presenter	$3,660	$2,960	$700	$0
☐	21104	Pending	N	06/23/2014	[redacted]		[redacted]	Organizer / Support	$3,680	$3,085	$595	$0
☐	21735	Pending	N	07/24/2014	[redacted]		[redacted]	Speaker / Presenter	$4,000	$3,000	$1,000	$0
☐	22748	Pending	N	09/15/2014	[redacted]			Speaker / Presenter	$3,270	$2,470	$800	$0
☐	22749	Pending	N	09/15/2014	[redacted]	01814	[redacted]	Speaker / Presenter	$3,300	$2,500	$800	$0
☐	21244	Pending	N	07/01/2014	[redacted]	08341	[redacted]	Speaker / Presenter	$3,260	$2,460	$800	$0

Nightly iPortal Upload to ET
(DOE Estimate, Event Title, Lockout Date, etc.)

iPortal Upload


Event Tracker
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View Requests
Search Events
Manager Org Report
CPO
Event Owner
Authorized Viewer
Admin !
Reconcile Events

Upload CSV Files

45 new event(s) have been added

Possible Matches

Showing 1 to 2 of 2 entries

iPortal Title	Mark as the Same Event ☐	Event Tracker Title
INFORMS Annual Meeting Nov 1, 2015 - Nov 4, 2015 Philadelphia, PA, US DoE Event Id: 28884	☐	INFORMS Annual Meeting 2015 Nov 1, 2015 - Nov 4, 2015 Philadelphia, Pennsylvania, USA http://meetings2.informs.org/wordpress/philadelphia/
69th National Conference of Society of Coporate Secretaries and Governance Professionals Jun 24, 2015 - Jun 27, 2015 Chicago, IL, US DoE Event Id: 28843	☐	69th National Conference of Society of Coporate Secretaries and Governance Professionals Jun 24, 2015 - Jun 27, 2015 Chicago, Illinois, USA http://conference.governanceprofessionals.org/home

Possible Duplicate Events

Showing 0 to 0 of 0 entries

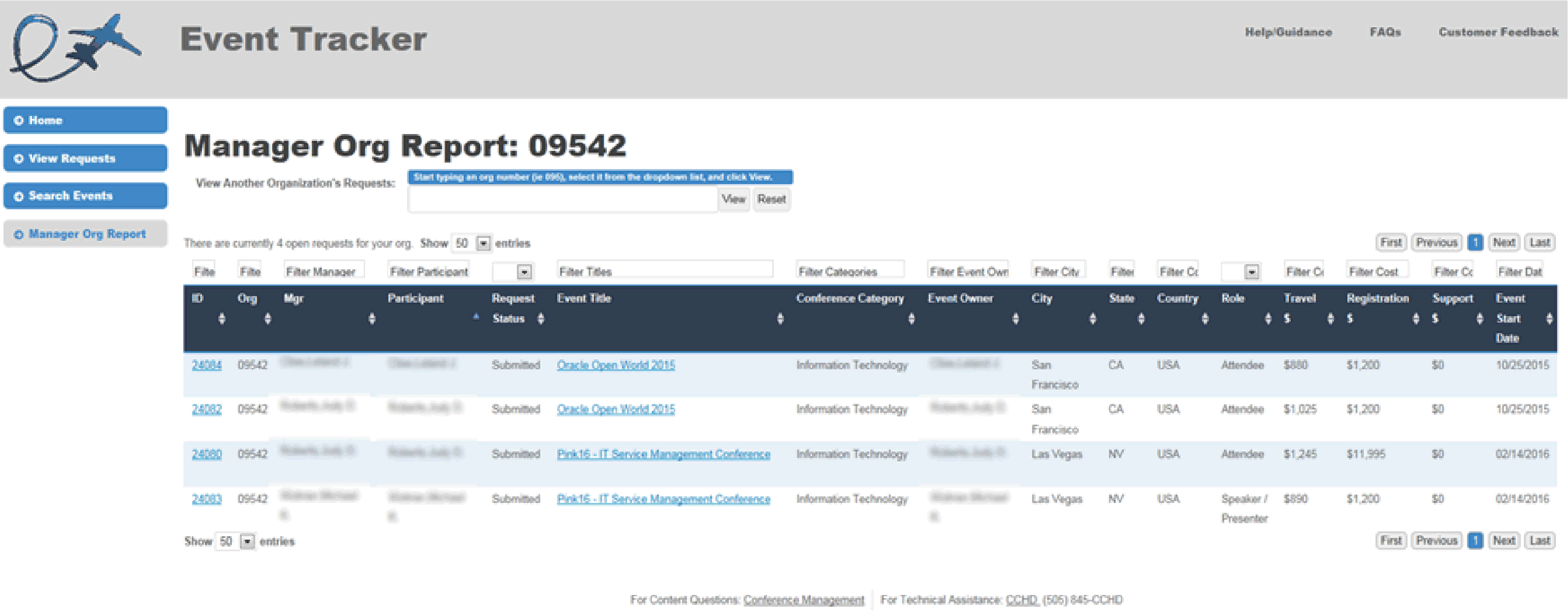
iPortal Title	Event Tracker Title
No data available in table	

Duplicate Events

Showing 0 to 0 of 0 entries

iPortal Title	Event Tracker Title

Manager Report



Manager Org Report: 09542

View Another Organization's Requests: Start typing an org number (ie 095), select it from the dropdown list, and click View. [View] [Reset]

There are currently 4 open requests for your org. Show 50 entries

First Previous 1 Next Last

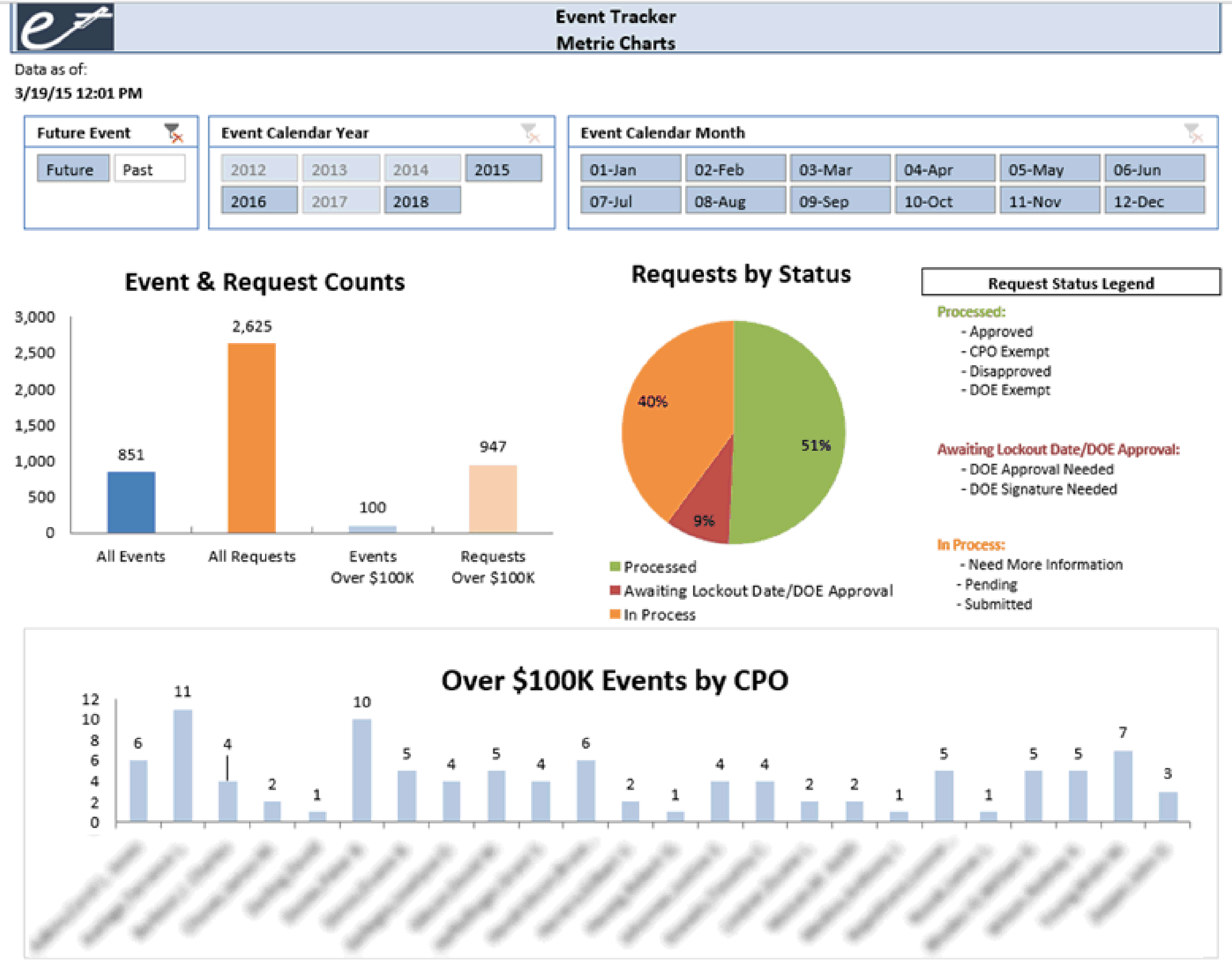
ID	Org	Mgr	Participant	Request Status	Event Title	Conference Category	Event Owner	City	State	Country	Role	Travel $	Registration $	Support $	Event Start Date
24084	09542	[redacted]	[redacted]	Submitted	Oracle Open World 2015	Information Technology	[redacted]	San Francisco	CA	USA	Attendee	$880	$1,200	$0	10/25/2015
24082	09542	[redacted]	[redacted]	Submitted	Oracle Open World 2015	Information Technology	[redacted]	San Francisco	CA	USA	Attendee	$1,025	$1,200	$0	10/25/2015
24080	09542	[redacted]	[redacted]	Submitted	Pink16 - IT Service Management Conference	Information Technology	[redacted]	Las Vegas	NV	USA	Attendee	$1,245	$11,995	$0	02/14/2016
24083	09542	[redacted]	[redacted]	Submitted	Pink16 - IT Service Management Conference	Information Technology	[redacted]	Las Vegas	NV	USA	Speaker / Presenter	$890	$1,200	$0	02/14/2016

Show 50 entries

First Previous 1 Next Last

For Content Questions: Conference Management | For Technical Assistance: CCHD (505) 845-CCHD

CM Reporting - Metrics



Event Tracker
Metric Charts

Data as of:
3/19/15 12:01 PM

Future Event
Future
Past
Event Calendar Year
2012
2013
2014
2015
2016
2017
2018
Event Calendar Month
01-Jan
02-Feb
03-Mar
04-Apr
05-May
06-Jun
07-Jul
08-Aug
09-Sep
10-Oct
11-Nov
12-Dec
Event & Request Counts
3,000
2,500
2,000
1,500
1,000
500
0
851
2,625
100
947
All Events
All Requests
Events Over $100K
Requests Over $100K
Requests by Status
40%
51%
9%
🟩 Processed
🟥 Awaiting Lockout Date/DOE Approval
🟧 In Process
Over $100K Events by CPO
12
10
8
6
4
2
0
6
11
4
2
1
10
5
4
5
4
6
2
1
4
4
2
2
1
5
1
5
5
7
3

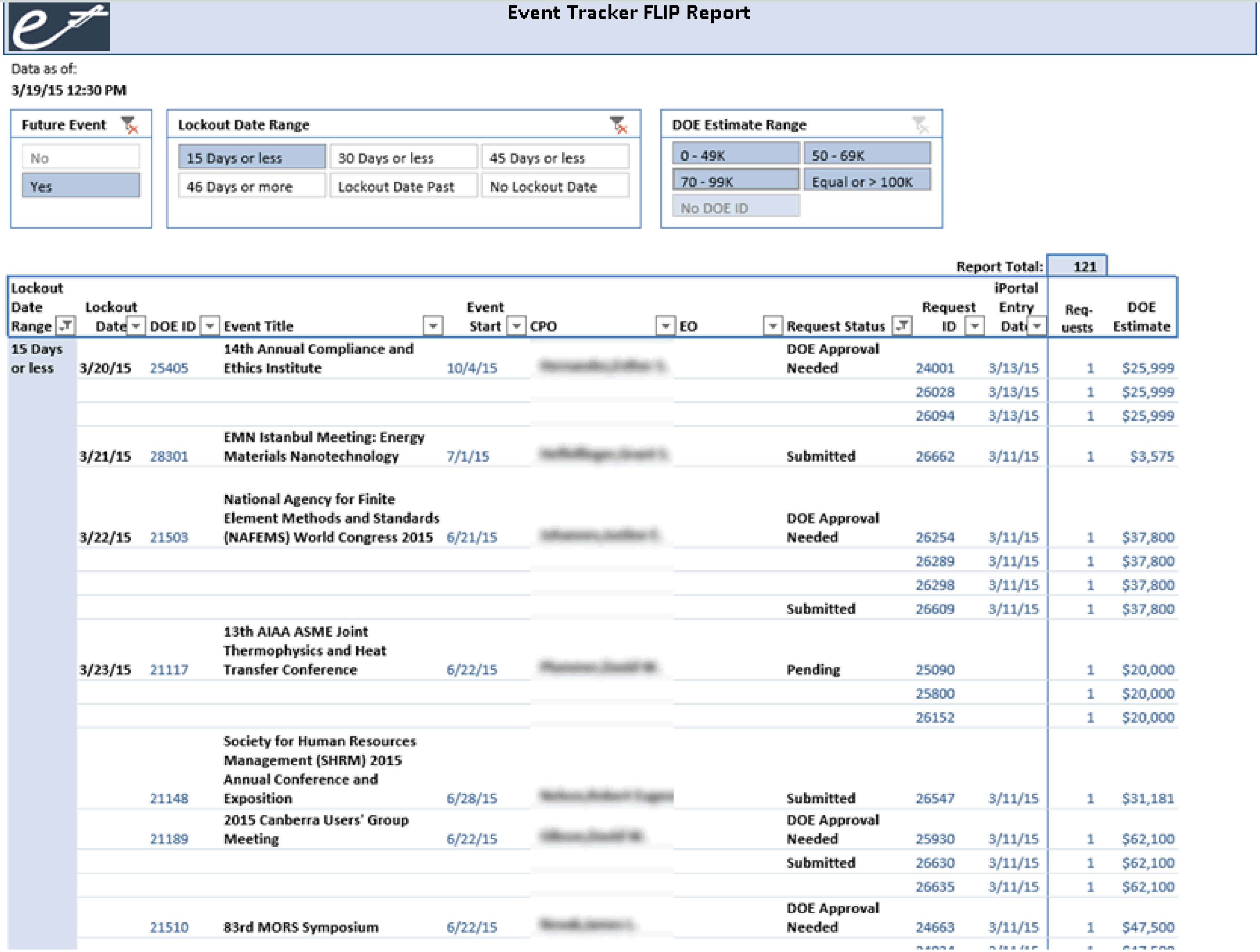
Request Status Legend

Processed:
- Approved
- CPO Exempt
- Disapproved
- DOE Exempt

Awaiting Lockout Date/DOE Approval:
- DOE Approval Needed
- DOE Signature Needed

In Process:
- Need More Information
- Pending
- Submitted

CM Reporting – Lockout Date Range



Event Tracker FLIP Report

Data as of:
3/19/15 12:30 PM

Future Event
No
Yes
Lockout Date Range
15 Days or less
30 Days or less
45 Days or less
46 Days or more
Lockout Date Past
No Lockout Date
DOE Estimate Range
0 - 49K
50 - 69K
70 - 99K
Equal or > 100K
No DOE ID

Report Total: 121

Lockout Date Range	Lockout Date	DOE ID	Event Title	Event Start	CPO	EO	Request Status	Request ID	iPortal Entry Dat	Req-uests	DOE Estimate
15 Days or less	3/20/15	25405	14th Annual Compliance and Ethics Institute	10/4/15	[redacted]		DOE Approval Needed	24001	3/13/15	1	$25,999
								26028	3/13/15	1	$25,999
								26094	3/13/15	1	$25,999
	3/21/15	28301	EMN Istanbul Meeting: Energy Materials Nanotechnology	7/1/15	[redacted]		Submitted	26662	3/11/15	1	$3,575
	3/22/15	21503	National Agency for Finite Element Methods and Standards (NAFEMS) World Congress 2015	6/21/15	[redacted]		DOE Approval Needed	26254	3/11/15	1	$37,800
								26289	3/11/15	1	$37,800
								26298	3/11/15	1	$37,800
							Submitted	26609	3/11/15	1	$37,800
	3/23/15	21117	13th AIAA ASME Joint Thermophysics and Heat Transfer Conference	6/22/15	[redacted]		Pending	25090		1	$20,000
								25800		1	$20,000
								26152		1	$20,000
		21148	Society for Human Resources Management (SHRM) 2015 Annual Conference and Exposition	6/28/15	[redacted]		Submitted	26547	3/11/15	1	$31,181
		21189	2015 Canberra Users' Group Meeting	6/22/15	[redacted]		DOE Approval Needed	25930	3/11/15	1	$62,100
							Submitted	26630	3/11/15	1	$62,100
								26635	3/11/15	1	$62,100
		21510	83rd MORS Symposium	6/22/15	[redacted]		DOE Approval Needed	24663	3/11/15	1	$47,500

Email Notifications

Sandia National Laboratories

Participant Notifications

1	Request is Submitted
2	Request is Approved
3	Request is Cancelled
4	Request is marked as Exempt by CPO
5	Request is disapproved by CPO
6	CPO/EO Contact Participants – Verify Role
7	CPO/EO Contact Participants – Verify Cost Estimate
8	CPO/EO Contact Participants – Verify Event Request Information
9	CPO/EO Contact Participants – Verify Intent to Attend

CPO Notifications

1	New Event assigned to CPO
2	CPO transfers Event to another CPO
3	CPO delegates EO
4	EO declines Event Delegation
5	Package Needed - Event with DOE Estimate >$100K and Lockout Date reached
6	DOE has selected Sandia to lead the Package
7	Event Status updated by CM
8	Deputy CPO designated/removed

Other Notifications

1	Request submitted for an individual in Manager's Org
2	Authorized Viewer Added or Removed by CPO, Deputy CPO or EO

Successful Outcomes

- CPOs have taken an active role in managing event attendance and partnering with CM
- Improvements for CM team in processing requests, identifying/resolving duplicates, sharing info with CPO community
- Greater clarity for end-users on status of requests and expectation of when they will receive approval
- Usage: Increased count of request submissions by ~ 19%
  - (Feb 2014 - Feb 2015) 7,316 requests to attend 2,581 events
  - (Feb 2013 - Feb 2014) 6,158 requests to attend 2,283 events

Q&A