LOGO REDACTED	# Facilitating the NMCI Process Call
Internal Document: **Work Instruction**	**Only the on-line version is controlled.** **All other versions are uncontrolled and for reference only.**

Document Control Information

Document Title	Facilitating the NMCI Process Call
Location	Processes SharePoint Site
Parent High-Level Process / Function	Configuration Management

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1. Purpose

This document identifies the steps used in facilitating the NMCI process call.

2. Responsibility and Authority

Group/Title/ Functional Role	Description (Provide a brief description of the role of the individual/group **relative to Section 3**.)
Technical Publications (Tech Pubs)	Document Owner
Facilitator	Schedules, invites participation in, hosts, records, and posts recordings and presentations of the NMCI process call; maintains the Process Call SharePoint site; creates and posts participation surveys; troubleshoots issues as needed

3. Work Instructions

The following steps assume the facilitator has been given the necessary level of permissions and accounts with MeetingPlace and SharePoint and alerts for process call requests have been set up.

3.1 Maintaining the Process Call SharePoint Site

3.1.1 Process Requests to Present

When a *Process Call Request* is submitted, the process call facilitator receives an alert email.

3.1.1.1 On the Process Call SharePoint site, **URL REDACTED**, click **Request to Present**.

3.1.1.2 Click the listed request. This opens the completed request form, from which all the necessary information for scheduling and calendar maintenance can be obtained.

3.1.1.3 When the request has been processed (per steps 3.1.2 and 3.1.3), click **Close**.

3.1.1.4 On the *Request to Present* page, hover the cursor over the title of the processed request and click the arrow at the right of the box that appears around the title.

3.1.1.5 On the drop-down menu, click **Delete**.

3.1.1.6 A Windows Internet Explorer (IE) question box appears ("Are you sure you want to send this item to the site Recycle Bin?"). Click **OK**.

3.1.1.7 Forward the alert email to the presenter with the following message added to the beginning of the email's body:

This process call has been scheduled as requested. You will receive an invitation with login information during the week before the call (probably Thursday). Please remember to place the following link to the Processes SharePoint site at the end of your slide presentation, for participants to use to access the call's participation survey at:

URL REDACTED

3.1.2 Update the Process Call Calendar

3.1.2.1 On the Process Call SharePoint site, **URL REDACTED**, under the heading *Calendar*, next to the date of the process call being added, click **NMCI Process Call**.

***NOTE:** Some calls may need to be scheduled on dates other than the every-other-Wednesday dates that are set up by default on the calendar. In this case, create a new calendar entry with the appropriate content, per steps 3.1.2.3 through 3.1.2.5.

3.1.2.2 Click **Edit Item**.

3.1.2.3 Change the content of the *Title* box to <*YYYYMMDD*>-Process Call - <*Title*>.

3.1.2.4 Complete the *Description* box:

- *Topic*
- *Presenter*
- *Audience*
- (Include the short description from the *Request to Present*)

3.1.2.5 Click **OK**.

3.1.3 Maintain the Process Call Schedule

3.1.3.1 On the Process Call SharePoint site, **URL REDACTED**, click **Shared Documents**.

3.1.3.2 Open the current year's *Process Call Schedule* Excel file.

3.1.3.3 Update the *Process Call Schedule* Excel file with the called-for information.

3.1.3.4 Close the file, being sure to save the changes.

3.2 Scheduling the NMCI Process Call

3.2.1 In IE, go to MeetingPlace at:

URL REDACTED

3.2.2 Click **Schedule Meeting**.

3.2.3 Under *Meeting Information*, complete the following fields:

- Subject: <*YYYYMMDD*>-Process Call - <*Title*>
- Meeting ID: <*####*>

***NOTE:** This is optional, as MeetingPlace will assign a random number, but if a series of meetings is going to be conferenced together to allow for over 50 participants (see Section **Error! Reference source not found.**), complete this field with consecutive numbers for the consecutive meetings.

- Date
- Time: (Be aware of what time zone MeetingPlace is set in. Ensure the start time matches 1400 Eastern.)
- Duration: 60
- Meeting template: (Collaborative)
- Meeting category: Standard
- Allow external web participants: Yes
- Number of participants: 50

3.2.4 Click **More Options**.

3.2.5 Select **List meeting publicly**.

3.2.6 In the *Entry announcement* and *Exit announcement* fields, select **Silent**.

3.2.7 Select **Yes** in the following fields: *End of meeting*; *Meeting extension*

3.2.8 Click **Submit**.

3.2.9 Click **Schedule**.

3.2.10 MeetingPlace will send you an invitation email.

3.3 Participation Surveys

All process calls require a record of who has participated in the training. To gather that information and create that record, a participation survey needs to be created and posted on the Processes SharePoint site.

3.3.1 Create a Participation Survey

3.3.1.1 When at the Processes (NOT Process Call) SharePoint site (**URL REDACTED**), click **View All Site Content**.

3.3.1.2 On the *All Site Content* page, click **Create**.

3.3.1.3 On the *Create* page, in the list under the heading, *Tracking*, click **ProcessSurveyTemplatev2**.

3.3.1.4 On the *New* page that appears, complete the *Name* text box by typing "<*YYYYMMDD*>-ProcessCall-<*Title*>". Notice there are no spaces. This keeps the survey's URL from getting too long. Editing how the survey's name displays is done in Step 3.3.2.

3.3.1.5 For the question, *Display this survey on the Quick Launch?*, select **Yes**, then click **Next**.

3.3.1.6 The survey's home page now displays. Copy the URL for the survey.

3.3.1.7 Send an email to **EMAIL ADDRESS REDACTED**, including in the body the survey's URL (copied in step 3.3.1.6), and ask for NMCI visitors to be given permission to contribute to the survey.

3.3.2 Edit How the Survey's Name Displays

3.3.2.1 On the survey's home page, click **Settings**.

3.3.2.2 In the drop-down menu, click **Survey Settings**.

3.3.2.3 On the *Customize <survey name>* page, in the list under the heading, *General Settings*, click **Title, description and navigation**.

3.3.2.4 On the *Survey General Settings: <survey name>* page, in the *Name* text box, add appropriate spaces so the survey's name is in the format, <*YYYYMMDD*>-Process Call - <*Title*>.

3.3.2.5 Ensure **Yes** is selected in answer to the questions, "Display this survey on the Quick Launch?" and "Show user names in survey results?".

3.3.2.6 Ensure **No** is selected in answer to the question, "Allow multiple responses?", then click **Save**.

*****REMAINDER OF DOCUMENT DELETED. ABOVE IS WRITING EXAMPLE ONLY.*****