



Database Training

A Tab-by-Tab explanation of selected features and fields

12/1/2022

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GENERAL FEATURES

Technology Requirements

- Internet capable device with connection.
- May be accessed on a computer, tablet, handheld device or smartphone.
- Compatible with Windows and Mac platforms.
- Any up to date internet browser, i.e. Chrome, Explorer, Firefox, etc.

To Access

- The web address is: <https://webdatabase.icdlearning.org/Production/>
- An easy way to access the database homepage is through the ICD website: <http://icdlearning.org/> Once there, go click on the keyboard icon on the upper right-hand side of the page.
- A user will need to obtain a Login-ID and password from ICD in order to access the database. If the user should forget their password or need a new one assigned, please contact an ICD staff member at (219) 738-9029 for assistance.

Layout

- Home screen has two menu bars.
- Top menu bar contains the main tabs.
 - Participants, Providers, Courses, Accounts, Vouchers, Expenditures.
 - The text is highlighted red for the tab where the user is currently working.
 - After logging on, you'll be automatically directed to the Participants tab.
- Left menu bar contains links to pages that exist within each main tab.
 - The text is highlighted red for the tab where the user is currently working.
- On all pages except Accounts, the left menu bar also has two buttons:
 - New: Opens blank entry form.
 - Lookup: Returns to the search page for that tab.

Features

- Searchable data.
 - Only using one search field will create a search.
 - Enter information in multiple search fields to narrow the search.
- Sortable lists.
 - Lists may be sorted by column headings, if the text is underlined.
 - The entire list – including all pages - will be sorted alphabetically or numerically.
 - Up to 25 list entries will display per page. Scroll to see all 25.
- Warning messages.
 - Warnings are occasionally displayed to remind users of potential policy issues. For example, a warning will appear if a participant is over their funding limit.

- Warnings will not always block activity, and may be overridden on a case-by-case basis.

Tips and Hints

- SAVE FREQUENTLY! If your session times out, it does NOT automatically save.
- For security purposes, the database will time out after an extended time of no activity.
- Save every change and new entry before navigating away from a page.
- Required fields are highlighted yellow.
- To enlarge the view of the database on your computer, simply hold down the Ctrl key and press the + key. To make the screen smaller, hold down the Ctrl key and press the – key. On a Mac, hold down the Command key and press the + key. Once again, to make the screen smaller hold down the Command key and press the – key.
- Whenever using the search feature, you can expand your search by using a wildcard by typing % before your requested search. By typing %, your search will find what is typed after the % within the parameter being searched. For example, searching %HVAC would not only give results that start with HVAC, but i.e. also, Into to HVAC, Basic HVAC, Advanced HVAC Industrial to name a few.

Notes

PARTICIPANTS

When entering a new participant into the database, there are three screens (listed on the left hand side) that need to be completed. **Personal Data, ICD Data** and **Work Data**

To enter a new participant, start by clicking the **Participants** tab at the top and click on the **NEW** button. The following screen should appear:

The screenshot shows the 'NEW' form for entering a participant's personal data. The form is titled 'Institute for Career Development' and 'Site Coordinator : Flexville test'. The navigation menu includes 'Participants', 'Providers', 'Courses', 'Accounts', 'Vouchers', 'Expenditures', and 'Logout'. The form fields are as follows:

Record #:		Gender:	Unknown
Old ID:		YTD TA:	
Title:		YTD CC:	
First Name:		Home Phone:	NNN-NNN-NNNN
Middle Init:		Cell Phone:	NNN-NNN-NNNN
Last Name:		Rcv Txt Msgs:	<input type="checkbox"/>
Address 1:		Work Phone:	NNN-NNN-NNNN
Address 2:		E-Mail:	
City:		Birth Date:	MM/DD/YYYY
State:	Select State	Age Range:	
Zip:	NNNNN		

Buttons: New, Lookup, Save, Save and go to ICD Data screen, Cancel

The more field boxes you can fill in, the better output of data and reporting you'll have. Here's an explanation of the field boxes within the **Personal Data** tab.

- **Record Number** is randomly generated by the database to ensure each participant is unique.
- **Old ID** is no longer part of the database and does not show.
- Required fields: **First Name, Last Name, E-Mail** (dummy email may be entered until an actual email is received).
- **YTD TA** and **YTD CC** will self-populate from vouchers and customized classes.
- In regards to phone numbers, ICD puts a higher recommendation on a cell phone number being entered. When entering a phone number, be sure to submit 10 digits.
- **Rcv Txt Msgs**: This field is for a *future enhancement*, where coordinators may be able to send robo-texts to participants who opt into them.

- **Birth Date:** Click on Year to scroll through years quickly.
- **Age Range** will self-populate from **Birth Date** entry.

Once the **Personal Data** field boxes have information in them, click on the **Save and go to the ICD Data screen**. After doing that, you should then see the following screen appear:

The screenshot shows the ICD Data entry screen for participant 880: Sandy Smith. The interface includes a navigation menu on the left with the following items: Personal Data, ICD Data (selected), Work Data, Vouchers, Memos, Custom Courses, Credentials, and Status History. The main content area contains the following fields and controls:

- Status:** A dropdown menu with "Select Work Status" selected.
- Referral Source:** A dropdown menu with "Select Ref Source" selected.
- Restricting Activities:** A checkbox.
- Issuance 14:** A checkbox.
- Issuance 15:** A checkbox.
- Approved:** Radio buttons for "Yes" (selected) and "No".
- Ineligible:** Radio buttons for "Yes" and "No" (selected).
- Reason:** A text input field.
- Licenses/Certifications/Degrees:** A section with a "Seeking Degree" checkbox.

At the bottom of the screen, there are four buttons: "Save", "Save and go to Work Data screen", "Done", and "Cancel".

Field boxes for **ICD Data** tab:

- **Status** is required field. Select the appropriate work status from the drop down. You'll also be asked for a starting date for that status.
- **Restricting Activities:** Check as LJC policy indicates. Warning message will pop up when adding participant to a roster or voucher if this checkbox is activated.
- **Issuance 14:** Approval needed to combine funds. If checked, enter start and end dates.
- **Issuance 15:** Approval needed for Retiree TA. If checked, enter start and end dates.
- **Approved, Ineligible:** Check Yes or No according to LJC policy. Warning message will pop up when adding participant to a roster or voucher.

- **Referral Source:** Tracks local marketing and outreach efforts.
- **Degree Seek:** Check if participant is working toward a degree or certification. Upon achieving the credential, enter detail.
- **Licenses/Certifications/Degrees:** Self populates from Credentials detail.

Once the **ICD Data** field boxes have information in them, click on the **Save and go to the Work Data screen**. After doing that, you should then see the following screen appear:

The screenshot shows the ICD system interface for participant 882: Sandy Smith. The interface includes a navigation menu on the left with options like Personal Data, ICD Data, Work Data, Vouchers, Memos, Custom Courses, Credentials, and Status History. The main area shows fields for Badge #, Plant, Department, Occupation, Local Union, and checkboxes for Represented?, Life Time TA, and Life Time CC. It also displays Entry Date, Update Date, and User information.

Field boxes for the **Work Data** screen:

- **Badge #** is a required field. Can be any unique identifying number, according to local usage, i.e. clock number.
- **Plant, Department, Occupation and Local Union.** More information about the participant, not required fields. Keep in mind, **Department** may change often for some workers.
- **Represented:** Check to track represented workers.
- **Lifetime TA and Lifetime CC** will self-populate from vouchers and customized course rosters.
- **Entry Date and Update Date** will self-populate.

- **User** is the person who logged in and is entering data.

Memos: Add or edit memos about individual participants.

Vouchers and Custom Courses are printable historical lists.

Credentials: Add certifications or degrees as a participant achieves them.

Status History: Shows the history of status changes.

Tips and Hints in Participants

- Click **New** to add a new participant. Click **Lookup** to return to search screen.
- Fill in all **THREE** pages of participant data: **Personal Data**, **ICD Data** and **Work Data**.
- After clicking on the **Participants** tab, at the bottom of the page the email option is given.
- If an active worker has their status box checked “Other” or “Retired” within the tab **Participants - ICD Data** they will not be counted as part of participation. Be sure that active workers have their status checked as “Active”. If not checked active, you may receive a warning that they are not eligible for a class.
- If a participant is approved for Issuance #14, go to the participant’s profile, select the *ICD Data* tab, click “Yes” Issuance #14 and enter the date range. After doing that, if the amount of funds available for the participant isn’t correct, please contact ICD.

Database Web-Access for a Participant

Optional Feature

This feature allows a participant the ability to view their own **Account Information**, **Customized Classes** and **Tuition Assistance**. To gain access to this information, an individual participant may go to the ICD website, www.icdlearning.org and click on the user icon next to the keyboard icon. That will then take the participant to a webpage where they can complete the self-registration process. If they are unsuccessful in using the self-registration process or prefer assistance, the database user may register a participant to use this feature. Follow these steps:

- Click on **Participants** and **Select** the participant.
- On the lower left side click on **Mobile Login**. If this is the first time registering a participant for this feature, a message will appear saying *No Mobile Login Data*. Click **Close Message**.
- Click **New Login**.
- Below is the screen that should appear at this time:
- The database will automatically create a Login, that can be edited at this time.
- Follow the requirements for the Login and Password and click **Save**.

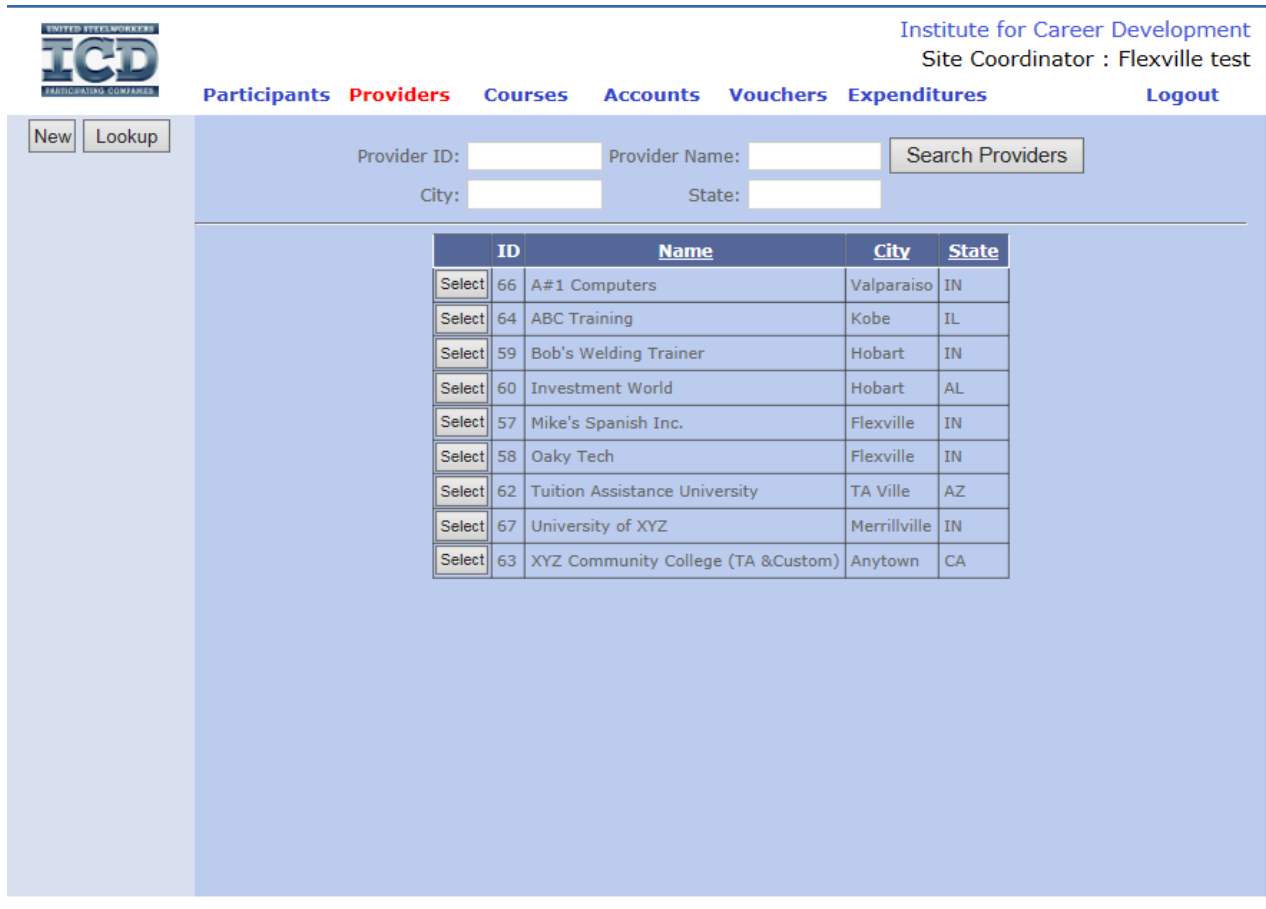
The screenshot shows the ICD website interface. At the top left is the ICD logo (United Steelworkers Participating Companies). At the top right is the text "Institute for Career Development" and "Korey Fiste : Flexville test". Below this is a navigation menu with items: Participants, Providers, Courses, Accounts, Vouchers, Expenditures, Admin, and Logout. The main content area is titled "994 : Johnny Doe" and contains a form for "Mobile Login". The form has a left sidebar with menu items: Personal Data, ICD Data, Work Data, Vouchers, Memos, Custom Courses, Credentials, Status History, and Mobile Login (which is highlighted). The form fields are: Login (JDoe6000), Password, Repeat Password, and Enabled (checked). Below the fields are the requirements: "Login Requirements: At least one capital and lower case letter and one number and contain six or more characters." and "Password Requirements: At least one capital and lower case letter and one number and contain four or more characters." At the bottom of the form are "Save" and "Cancel" buttons.

- As mentioned above, the participant should now be able to go to the ICD website, click on the user icon and log into their account. The participant cannot edit any data.

Notes

PROVIDERS

Clicking on the **Providers** tab will provide a list of providers specific to the site location, who conduct training activities. The Providers can be searched by Provider ID, Provider Name, City and/or State. The list of providers is specific to your site.



The screenshot shows the ICD (Institute for Career Development) web interface. At the top left is the ICD logo with the text "UNITED STEELWORKERS" above it and "TRAINING COMPANY" below it. To the right of the logo, the text reads "Institute for Career Development" and "Site Coordinator : Flexville test". Below this, there are navigation tabs: "Participants", "Providers" (highlighted in red), "Courses", "Accounts", "Vouchers", "Expenditures", and "Logout". On the left side, there are two buttons: "New" and "Lookup". The main content area has a search form with fields for "Provider ID:", "Provider Name:", "City:", and "State:", and a "Search Providers" button. Below the search form is a table with the following data:

	<u>ID</u>	<u>Name</u>	<u>City</u>	<u>State</u>
Select	66	A#1 Computers	Valparaiso	IN
Select	64	ABC Training	Kobe	IL
Select	59	Bob's Welding Trainer	Hobart	IN
Select	60	Investment World	Hobart	AL
Select	57	Mike's Spanish Inc.	Flexville	IN
Select	58	Oaky Tech	Flexville	IN
Select	62	Tuition Assistance University	TA Ville	AZ
Select	67	University of XYZ	Merrillville	IN
Select	63	XYZ Community College (TA &Custom)	Anytown	CA

To view detail information about a provider, click **Select** next to the provider name.

- **YTD CC** and **YTD TA** will self-populate from rosters and vouchers.

On the left side:

- The **Memos** tab allows you to add or edit memos about individual providers.
- **Voucher** and **Custom Courses** tabs will provide historical data of classes presented by the provider. These are also printable lists. Columns that are underlined are sortable.

To enter a new provider, click on **NEW**. The following screen should appear:

The screenshot shows the 'Providers' form in the ICD system. The form is titled 'Provider ID:' and contains the following fields and options:

- Name:** A text input field highlighted in yellow.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu currently showing 'Select State'.
- Zip:** A text input field.
- Taxpayer ID:** A text input field.
- Contact Person:** A text input field.
- Phone:** A text input field with a mask 'NNN-NNN-NNNN'.
- Fax:** A text input field with a mask 'NNN-NNN-NNNN'.
- E-Mail:** A text input field.
- In House:** A checkbox.
- Tuition Assistance:** A checkbox.
- Custom:** A checkbox.
- Other:** A checkbox.
- YTD CC:** A text input field.
- YTD TA:** A text input field.

Navigation buttons include 'New' and 'Lookup' on the left side, and 'Save' and 'Cancel' at the bottom center.

Provider Info

- **Name** is required field.
- Check boxes – check all that apply: **In-House, Tuition Assistance, Custom, Other**. TA or Custom must be checked for those providers to be an available provider for those type of courses. If you are creating a customized class or a tuition assistance voucher and can't find the correct provider, check to make sure the appropriate boxes are checked.

Tips and Hints in Providers

- Click New to add a new provider. Click Lookup to return to search screen.
- Fields highlighted YELLOW are required.
- MUST add provider before adding course.

Notes

CUSTOMIZED COURSES

Clicking on the **Courses** tab will list all customized class that have been entered for your location in the database. Scrolling to the bottom may reveal additional pages.

UNITED STEELWORKERS
ICD
EMPLOYMENT COMPANIES

Institute for Career Development
Site Coordinator : Flexville test

Participants Providers **Courses** Accounts Vouchers Expenditures Logout

New Lookup

Course Name: End Date Starting:

School Name: End Date Ending:

Category: (All)

Exclude Shared From Other Locs: Exclude Closed:

	<u>Name</u>	<u>Shared</u>	<u>School</u>	<u>Category</u>	<u>LastEndDate</u>
Select	Class 1	73: Mittal- Boatmen	icd office	Pre-Technical Skills	2/2/2015
Select	Conflict Resolution 5/5/14		ABC Training	Personal Development	
Select	Database Training		A#1 Computers	Computers	4/30/2014
Select	Deleting		A#1 Computers	Computers	
Select	Green Energy Seminar		ABC Training	Personal Development	7/5/2017
Select	Health 4		XYZ Community College (TA &Custom)	Personal Development	
Select	Introduction to the Internet		A#1 Computers	Computers	6/24/2014
Select	Korey		XYZ Community College (TA &Custom)	Pre-Technical Skills	10/1/2017
Select	Landscaping-Pt.1-Summer09	257: Goodyear- Danville	Earl Crumpton	Basic Skills	7/29/2009

Searching

- Blank fields allow you to search for a course by: **Course Name, School Name, Category, End Date Starting** and **End Date Ending**.
- Checking **Exclude Shared From Other Locs** and clicking **Search Courses** will no longer list courses that have been shared to your location by other sites.
- Checking **Exclude Closed** and clicking **Search Courses** will only list classes where the Last End Date has not expired.
- **LastEndDate** can be a very helpful sort that will bring courses to that top that have the most recent ending sections. Some of the sections may not have ended.

Sorting

- Once again, titles of columns that are underlined can be alphabetized or ordered.

Creating a Course

- Click on **New** to create a new course. The following screen should appear:

The screenshot shows the 'Create Course' form in the ICD system. The form is titled 'Course Info' and is located under the 'Courses' menu. The form includes the following fields and options:

- Course Name:** A text input field with a yellow highlight.
- Provider:** A dropdown menu with '(None)' selected.
- Category:** A dropdown menu with '(None)' selected.
- Sub Category:** A dropdown menu with '(None)' selected.
- Course Topic:** A text input field.
- Telecasted:** A checkbox.
- Online Learning:** A checkbox.
- Memo:** A text area with a scroll bar.
- Save** and **Cancel** buttons.

The form is part of a larger application interface with a navigation menu at the top: Participants, Providers, **Courses**, Accounts, Vouchers, Expenditures, and Logout. The ICD logo is visible in the top left corner, and the text 'Institute for Career Development Site Coordinator : Flexville test' is in the top right corner.

Course Info

- **Course Name:** Type in the appropriate Customized Course Name.
- **Provider:** Choose from drop-down list of available providers.
- **Category** and **Sub-Category:** Select these according to the guidelines
- **Course Topic** allows user to provide a generic subject for a course.
- **Telecasted & Online Learning:** The check boxes no longer appear on this screen and have been moved to the Section screen.

Once course information is saved, you can then add a prerequisite if needed. If a prerequisite is entered, a participant must be registered for the prerequisite in order to register for the new course.



HVAC 2

Course Info

Course Name: HVAC 2
Def Provider: ABC Training
Category: Pre-Technical Skills
Sub Category: Building/Construction/Home Improvement
Course Topic: Heating and Air
Telecasted: no
Online Learning: no
Memo: Our site's second level of heating and air.



Sections:

Notes

Creating a class section within a course

- Select a course, then click on **Add Section**. The following screen should appear:

- **Section Name:** Assign unique names to different sections of the same course. Examples: Fall 2018-1, Fall 2018-2 and Spring 2019-1.
- **Start Date & End Date:** Must be in MM/DD/YYYY form.
- **Min Class Size** should be 5 or greater. For exceptions, contact a Program Specialist.
- **Training Hours:** The potential number of training hours an individual participant will receive by attending the section.
- **Location:** Where the training takes place.
- For now, us the **Course Memo** field to identify any class shadowing times.
- **Instructor:** Allows user to identify a specific instructor.
- **Instructor Hours:** The total amount of time the instructor spends teaching all sessions, including shadow sessions within the section. If there's a shadow class, this number will most likely need to be edited after clicking save.
- **Online Learning:** Mandated to check yes or no.
- **Telecasted:** If a Telecasted class, check the box.

- Check only one of **Cost Per Participant** or **Flat Rate** according to how the cost is charged. The selection determines where cost information is entered; in either **Per Participant Fee** or **Flat Rate Fee**.
- **Number Enrolled** will self-populate from rosters.
- **Total Cost** and **Cost to Participant** will self-populate depending on the number of participants on the roster.
- **Provider:** Select the provider that will be providing the education.
- **Waiting List** will display Yes or No according to whether there is a waiting list.
- **Share Section:** Allows the user to open the section roster to other, selected ICD sites. ONLY HOST SITES will enter a shared section. Sharing allows other users to add their participants to the roster. Non-host users cannot edit the course or section information. Costs associated with shared courses will be divided according to the home location of each participant on the roster. Example: Most telecast course sections will be shared so that other sites may add their participants to the roster.



ICD
INSTITUTE FOR CAREER DEVELOPMENT

Institute for Career Development
Site Coordinator : Flexville test

Participants
Providers
Courses
Accounts
Vouchers
Expenditures
Logout

HVAC 2 : Fall 2017 : ABC Training

Course Info

Sections

Section Name: Fall 2017	Cost Basis: P: Per participant
Start Date: 10/16/2017	Number Enrolled: 0
End Date: 11/27/2017	Per Participant Fee: \$300.00
Min Class Size: 5	Flat Rate Fee:
Max Class Size: 15	Books/Mtrls: \$50.00
Training Hours: 14	Total Cost: \$0.00
Location: Learning Center	Cost to Participant: \$350.00
Start Time: 01:00 PM	Provider: 64 : ABC Training
End Time: 03:00 PM	Waiting List: no
Days: Mon	Shared: no
Instructor: Mr. Air	
Instructor Hours: 30.00	
Course Memo: This class is also shadowed from 5:00PM - 7:00PM	

Rosters:

- In order to create the roster, click on the **Courses** tab, and **Select** the course section.
- Click on the **Rosters** button for the section you want to create a roster for.

The screenshot shows the ICD web application interface. At the top right, it says "Institute for Career Development" and "Site Coordinator : Flexville test". The navigation menu includes "Participants", "Providers", "Courses" (highlighted), "Accounts", "Vouchers", "Expenditures", and "Logout". Below the navigation, there are "New" and "Lookup" buttons. The main content area is titled "HVAC 2" and contains the following course information:

- Course Name: HVAC 2
- Def Provider: ABC Training
- Category: Pre-Technical Skills
- Sub Category: Building/Construction/Home Improvement
- Course Topic: Heating and Air
- Telecasted: no
- Online Learning: no
- Memo: Our site's second level of heating and air.

There are buttons for "Add Course", "Edit Course", "Delete Course", and "Add Prerequisite". Below this is a "Sections:" section with an "Add Section" button. A table lists the sections:

	Section	Enrolled	Start	End	Location	Days	Times		
Select	Fall 2017	0	10/16/2017	11/27/2017	Learning Center	Mon	01:00PM-03:00PM	Rosters	WaitList

Notes

- To add a participant to the roster, click **New Roster Entry**, search for participant, check **Add to Roster**.

The screenshot shows the ICD (Institute for Career Development) system interface. At the top left is the ICD logo with the text "INSTITUTIONAL EDUCATION" above it and "PARTICIPATING COMPANIES" below it. To the right of the logo, the text "Institute for Career Development" and "Site Coordinator : Flexville test" is displayed. Below this is a navigation menu with links: "Participants", "Providers", "Courses" (highlighted in red), "Accounts", "Vouchers", "Expenditures", and "Logout".

Below the navigation menu, there are two buttons: "New" and "Lookup". The main content area is titled "HVAC 2 : Fall 2017 : ABC Training". It displays "Seats available: 15" and "Wait list: no". On the left side of the main area, there is a sidebar menu with "Course Info", "Sections", and "Rosters" (highlighted in red). At the bottom of the main area, there is a red text message: "ICD Policy states that a minimum of 5 participants must be enrolled in a Customized Course." Below this message are three buttons: "New Roster Entry", "Back to Course", and "Done".

Notes

- Once the roster is completed and the class is over, be sure to go back and click complete on the roster for those who finished
- **Complete = Yes:** When checked, the record shows completed on the Participant Summary report. When course is a prerequisite for another course, checking completed shows the participant has met the pre-requisite.
- **Complete = No:** Participant didn't complete the section and their account WILL be charged for the course.
- Be sure to click **Save Completed Status** once the appropriate boxes are checked.
- A roster can be emailed by clicking the **Email** button.
- **Print Roster List** and **Print Contact List:** Two formatting options for printing the roster.

UNITED STEELWORKERS
ICD
INDUSTRIAL TRAINING CENTER

Institute for Career Development
Site Coordinator : Flexville test

Participants Providers Courses Accounts Vouchers Expenditures Logout

New Lookup

HVAC 2 : Fall 2017 : ABC Training

Seats available: 12 Wait list: no

Complete Check All Complete Uncheck All Complete Reset Save Completed Status

Select	Delete	WaitList	Last Name	First Name	Locn	Wk Status	Badge	Enrolled	Complete
Select	Delete	WaitList	Aaker	Avis	6000	Active	29	10/18/2017	<input checked="" type="checkbox"/>
Select	Delete	WaitList	Allman	Andrew	6000	Active	89	10/18/2017	<input checked="" type="checkbox"/>
Select	Delete	WaitList	Amies	Al	6000	Active	45	10/18/2017	<input type="checkbox"/>

ICD Policy states that a minimum of 5 participants must be enrolled in a Customized Course.

New Roster Entry Back to Course Done Email Print Roster List Print Contact List

Notes

- **Select** a participant to view detail.
- Check **Degree Seeking** if the participant will get a certification, degree or other credential as part of the course.
- **Passed Course** may be checked in cases where pass/fail is relevant.
- **Attending = Yes:** Means the participant is active in the course, and the participant's account will be charged.
- **Attending = No:** Means the participant has dropped the course, and the participant's account will NOT be charged. In flat rate courses, un-checking Attending will NOT increase the cost charged to other participants in the course.


The screenshot displays the ICD web application interface. At the top left is the ICD logo with the text "UNITED STEELWORKERS" and "INTEGRATING COMPANIES". At the top right, it says "Institute for Career Development" and "Site Coordinator : Flexville test". Below this is a navigation menu with tabs: "Participants", "Providers", "Courses", "Accounts", "Vouchers", "Expenditures", and "Logout". The main content area is titled "HVAC 2 : Fall 2017 : ABC Training". On the left side, there are buttons for "New" and "Lookup", and a sidebar menu with "Course Info", "Sections", and "Rosters" (highlighted in red). The main content area shows the following details for participant Avis Aaker: Participant: 730, Badge Nbr: 29, Amt Available: \$1,550.00, Enrolled Date: 10/18/2017, Degree Seeking: no, Passed Course: no, Attending: yes, and Completed Course: no. There is a "Notes" section with a scroll bar. At the bottom, there are buttons for "Edit", "Back to Course", "Roster List", and "Done".

Tips and Helpful Hints for Courses

- When a customized class ends, don't forget to go back in the database to the class roster and check "Completed" for those participants that completed the class. This step is important in order to have accurate reporting records.
- **Each customized course needs to have the cost entered in the Course Section Detail and within the Expenditures tab.**
- In order to delete a course section, you'll first need to remove all the participants from the class section. Then you will be able to delete the class section.

VOUCHERS

- Clicking on the **Voucher** tab will provide the list of vouchers entered, searchable fields and the opportunity to create and edit vouchers.



Institute for Career Development
Site Coordinator : Flexville test

Participants
Providers
Courses
Accounts
Vouchers
Expenditures
Logout

Last Name:
Provider Name:
Number:

Voucher ID:
Status: (ALL) ▼

	Nbr	ID	Status	Participant	Provider	Starts	Ends	Iss Amt	Iss Dt	Paid A
<input type="button" value="Select"/>	909	165616	Approved	Avis Aaker	A#1 Computers	2/20/2017	2/28/2017	\$1,000.00	2/21/2017	\$1,00
<input type="button" value="Select"/>	911	12663	Approved	Andy Anderson	A#1 Computers	6/26/2017	7/27/2017	\$3,700.00	6/22/2017	\$3,70
<input type="button" value="Select"/>	910	8181818	Approved	Korey Fiste	A#1 Computers	3/28/2018	3/29/2018	\$1,600.00	3/27/2018	\$1,60
<input type="button" value="Select"/>	912	gdgd	Approved	Korey Fiste	A#1 Computers	10/11/2017	11/23/2017	\$300.00	8/23/2017	
<input type="button" value="Select"/>	905	18118	Approved	Korey Fiste	Oaky Tech	12/15/2016	12/21/2016	\$300.00	12/14/2016	\$20
<input type="button" value="Select"/>	907	4646466	Approved	Korey Fiste	Oaky Tech	2/1/2017	2/28/2017	\$700.00	2/14/2017	\$70

< >

Notes

- Click **NEW** to create a voucher. The following screen should appear:

UNITED EYEWORKERS
ICD
 EDUCATION COMPANY

Institute for Career Development
 Site Coordinator : Flexville test

Participants Providers Courses Accounts **Vouchers** Expenditures Logout

New Lookup

Participant Provider

Application Date: Voucher ID: Start/End Date:

Voucher Status: Approved Denied Appealed Canceled Pending

Method of Payment: Direct to institution Payment to employee

Vchr Issued:	Paid Amt:	Paid Date:
Amt Avail:	Tuition + Books:	Total Fees:
Total Amt:	Issue Amt:	Issue Date:
YTD Paid TA	Amount available based on issued amount.	
	YTD Paid TA based on year of the voucher start date.	

- Select **Participant** and **Provider** to search and enter.
- An **Application Date** will self-populate based on today's date. If needed, that date may be edited.
- **Voucher ID** allows the site user to identify a unique code for each voucher. Must be unique.
- **Start/End Date** of the class must be entered.
- Select the appropriate **Voucher Status** and **Method of Payment**. Those selections can both be edited later if needed.
- Once general information is entered, click **Save** and then **Add Detail Line**.

Notes

At this time, you click on **Add Detail Line** to enter class tuition and/or book information.

The screenshot shows the ICD Vouchers form for adding a detail line. The form is titled "914 : 639C : Andy Anderson : Oaky Tech". The "Vouchers" tab is selected. The form contains the following fields and options:

- Course/Book Name: Math 401
- Books/Tuition: Tuition Books
- Course Subcategory: Math/Science
- Online Learning:
- Degree Seeking:
- Hours: 2
- Available Amt: \$50.00
- Cost/Hour: \$25.00
- Issue Amount: \$50.00
- Tuition/book cost: \$50.00
- Funding Category: Standard Courses
- Taxes/fees: (empty field)
- Total Cost: \$50.00
- Buttons: New, Lookup, Compute Costs, Save, Cancel

- **Add Detail** separately for Tuition and Books. Add as many detail lines as necessary.
- Enter the **Course Name** or **Book**.
- Select either **Tuition** or **Books**.
- Select a **Course Subcategory** that best applies.
- **Online Learning** required yes or no.
- **Degree Seeking** check if Degree Seeking.
- **Hours** should reflect credit hours, where appropriate.
- **Tuition/book cost** is the total cost for that item.
- Clicking **Compute Costs** will self-populate the **Cost/Hour, Issue Amount** and **Total Cost**.
- Once detail is added, click **Save**.

Notes

- Once back to the actual voucher screen, click **Edit** to update **Issue** and **Paid** info.



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914 : 639C : Andy Anderson : Oaky Tech

Vouchers

Participant **Andy Anderson**

Application Date: **10/19/2017**

Vchr Issued: **no**

Amt Avail: **\$2,450.00**

Total Amt: **\$50.00**

YTD Paid TA **\$0.00**

Provider **Oaky Tech**

Voucher ID: **639C**

Start/End Date: **10/30/2017 11/30/2017**

Voucher Status: **Approved**
 Method of Payment: **Direct to institution**

Tuition + Books: **\$50.00**

Issue Amt: **\$50.00**

Amount available based on issued amount.

YTD Paid TA based on year of the voucher start date.

Select	Delete	B/T	Course/Book Name	Subcategory	Hrs	Cost/Hr	Fees	Issued
<input type="button" value="Select"/>	<input type="button" value="Delete"/>	T	Math 401	math/science	2	\$25.00		\$50.00

- Check **Vchr Issued** box.
- Fill in the **Paid Amt** and **Paid Date**, edit the **Issue Date** if needed.
- Click **Save** to complete the entry of the voucher.

Tips and Hints for Vouchers

- Add participant information first, the detail and finally dates and costs.
- On the search screen, typing in the name of a provider will list all vouchers associated with that provider. Adding multiple search criteria will narrow the search.

- In order to delete or edit the details of a tuition assistance voucher, click on the Edit button on the screen of the voucher. Replace the paid amount with **zero** and click save. Now you'll have the option of deleting the voucher or editing any details of the voucher. If you are not deleting the entire voucher, it's important that you go back and enter the correct paid amount after editing any parts of the voucher.
- Voucher dollar amounts **are not** entered as an expenditure within the **Expenditure** tab. Once the voucher is completed, funds are automatically transferred to the Funding Summary Report.

ACCOUNTS

Expenditures

- Select Category and Year to view summary for that line item.
- Beginning Balance is the amount budgeted for that Category.
- Expenditures are cumulative monthly over the year.

Notes

Budgets

- ICD Headquarters will enter yearly site budgets once approved.
- Option is given to search Budget by Category and program year.

Notes

Program Analysis

Utilization Rate

- $\% \text{ rate} = (\# \text{Active \& Laid-off Customized Enrollments} + \# \text{Active \& Laid-off TA Class Enrollments}) \div \text{Total \#Eligible}$
- Shows how much the program is used by eligible members during a given time period.
- Can be thought of as participant traffic.
- To be counted: Customized - must be attending. Voucher - must be approved.

Multiple Enrollments

- # of Active & Laid-off individuals in Customized or TA classes over a given time period.
- % rate is a percentage of the Total # Eligible Employees.
- To be counted: Customized - must be attending. Voucher - must be approved.

Enrollments Per Category

- Total number of enrollments (entries on rosters, or classes tuition within vouchers) by category.
- % rate is the number of enrollments for a category divided by the total number of enrollments.
- Can be thought of as total number of seats filled in each category.

Enrollments Per Custom Category

- Details number of enrollments in Customized Courses by Sub-Category, for a given time.
- % rate is the number of enrollments for a category or sub-category divided by the total number of enrollments for a given time period.

TA Classes Per Subcategory

- Details the number of Tuition class enrollments by category approved for a given time period.
- % rate is a percentage of the total approved Tuition Vouchers in given time period.

Participants Per Department

- Count of Active and Laid-off participants by department.
- % rate is a percentage of total Active and Laid-off participants.
- The option is given for this report to be in Excel format.

Status and Referral

- Count of participants by Work Status (Active, Laid off, Retired, Spouse, Child/Grandchild, Other), that participated during a given time period.
- Count of participants by Referral Source. Shows how participants who took classes during a given time period heard about the program.

Funding Summary

- Displays the annual Budget, total Committed funds and total Expended funds; by line item Categories and Sub-Categories for a given time period.

Over Customized Course Limit

- Lists participants spending over \$2000 in Customized funds for a given time period. Defaults to \$2000, but any amount may be entered.

Over Spending Limit Detail

- Lists participants spending over \$1250 in Restricted Personal Development courses.
- Adds spending for all classes in the Sub-Categories of Arts/Crafts/Music and Health/Fitness/Sports.

Participant Spending

- Details an individual's spending in Customized Courses, Tuition Assistance and total for a given time period.
- The option is given for this report to be in Excel format.

Participant Spending By Plant

- Lists participants by plant; w/ total expenses in Customized and Vouchers for a given time period.
- Individuals with no plant assigned in Work Data will be grouped together in the report.
- The option is given for this report to be in Excel format.

Course Details By Category

- Details all Customized Courses, by Category or All, during a given time period.
- Report for Online Only or Telecasted Only can be created.
- Section Cost is total cost for all participants on a roster.
- Type: P=Per Participant F=Flat Rate
- Participant Cost is for Active and Laid off ONLY (others cannot incur cost to program).
- Hours is the total training hours offered for the section.
- The option is given for this report to be in Excel format.

TA Details By Category

- Lists all Vouchers, with detail, approved, with start date in a given time period.
- Report can be created to just show the Online Only vouchers.
- The option is given for this report to be in Excel format.

Participant Summary


- Summary of various statistics for Active and Laid off participants for a given time period.
- Does not include Retirees, Spouses, Children or Grandchildren, or Other.
- % rates are percentages of the total Eligible Employees.

Expenditure Detail Report

- Lists expenditures in detail based on: Year, Quarter, Dates, Payee and Account.
- This report is very helpful in giving needed details to fully understand the Funding Summary Report.
- The option is given for this report to be in Excel format.

EXPENDITURES

- The **Expenditure** screen also has searchable fields.
- Expenditures are shown in a list and may be sorted by: **PO Nbr**, **Date** (this is the actual Committed Date), **Payee**, **Amount** and **Account**.



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Lookup

Expenditure

Expenditures

Search Expenditures

Reimbursemts

PO Number:

Payee:

Account: Select Account ▼

Begin Date: MM/DD/YYYY

End Date: MM/DD/YYYY

	PO Nbr	Date	Payee	Amount	Account
Select	898	3/18/2014	Dawn Flex	\$1,000.00	1221000
Select	900	7/16/2014	Southwest	\$600.00	1323000
Select	901	3/4/2014	Times	\$250.00	1222200
Select	902	4/1/2014	Times	\$25.00	1322000
Select	905	9/2/2014	A1 Computer Training	\$100.00	1210000

Notes

- To enter an expenditure, click on **NEW** within the **Expenditures** tab. The following screen should appear:

The screenshot shows the 'Expenditure' form in the ICD system. The form is titled 'Expenditure' and is part of the 'Expenditures' tab. It includes the following fields and controls:

- Account:** A dropdown menu with 'Select Account' as the current selection.
- Payee:** A text input field.
- Committed:** Fields for 'Amount' and 'Date' (MM/DD/YYYY).
- Expended:** Fields for 'Amount' and 'Date' (MM/DD/YYYY).
- Memo:** A large text area for entering a memo.
- Buttons:** 'New', 'Lookup', 'Save', and 'Cancel' buttons.

- Account:** Select the appropriate account line item to be charged.
- Payee:** Type two letters to activate auto-fill, if Payee already exists in database. Otherwise type the full name of the **Payee**.
- Type in the **Committed Amount** and **Date**. If you know the **Expended** amount at this time, type the dollar amount and the **Date**.
- A memo can be added, i.e. the invoice number or explanation. ICD highly recommends a short explanation of the expense.
- Click on **Save**.
- Edit** allows user to enter additional information for an expenditure or make changes.
- NO TUITION ASSISTANCE SPENDING IS ENTERED WITHIN THE EXPENDITURES TAB.**

Refunds (formerly Reimbursements)

- Allows user to refund the program when funds are spent and accepted back into an account. Example: When an item is returned and actual funds go back into the ICD ledger account.
- In the Funding Summary and Expenditure Detail reports, refunds appear as *negative* entries.

Notes

With the exception of tuition assistance, funds spent by the program must be accounted for within the expenditure tab.

Tuition assistance expenses are created through the voucher. By creating a voucher with an issue date & dollar amount and a paid date & dollar amount, the expenditure will be automatically included as an expenditure. To view total tuition assistance expenditures, go to Account--Program Analysis --Funding Summary.