



Database Training

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

A more complete Database Quick Reference Guide will include Descriptions of all features and data fields; as well as Tips and Tricks discovered and developed during these training sessions.

The Quick Reference Guide will be issued later this summer.

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 common internet browser, i.e. Chrome, Explorer, Firefox, etc.

Layout

- Pages have 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.
- 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 one search field is necessary for a search.
 - Enter information in multiple search criteria to narrow search.
- Sortable lists.
 - Lists may be sorted by column headings.
 - 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 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.
- Save every change and new entry before navigating away from a page.
- Top menu bar returns to search page for each tab.
- Required fields are highlighted yellow.

PARTICIPANTS

Data fields that may require further explanation

Personal Data

- **Record Number** is randomly generated to ensure each participant is unique.
- **Old ID** is the Participant ID number carried over from the old database.
- Required fields: **First Name, Last Name, E-Mail** (dummy may be entered if unavailable).
- **YTD TA** and **YTD CC** will self-populate from rosters and vouchers.
- **Rcv Txt Msgs**: This field is for a *future enhancement*, where users 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.

Notes

ICD Data

- **Status** is required field.
- **Restricting Activities**: Check as LJC policy indicates. Warning message will pop up when adding participant to a roster or voucher.
- **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.

Notes

PARTICIPANTS, cont.

Work Data

- **Badge #** is required field. Can be any identifying number, according to local usage.
- **Represented:** Check to track non-represented workers, as in Right-to-Work areas.
- **Lifetime TA** and **Lifetime CC** will self-populate from rosters and vouchers.
- **Entry Date** and **Update Date** will self-populate.
- **User** is the person entering data.

Notes

Memos: Add or edit memos about individual participants.

Vouchers and Custom Courses are printable lists.

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

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.

Notes

PROVIDERS

Data fields that may require further explanation

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 available for those courses.
- **YTD TA** and **YTD CC** will self-populate from rosters and vouchers.

Notes

Memos: Add or edit memos about individual providers.

Vouchers and Custom Courses are printable lists. List is sortable by underlined column headers.

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

COURSES

Data fields that may require further explanation

Course Info

- **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. In future database enhancements, this will allow users to track all courses within a broader subject area.
- **Telecasted:** Check if the course is available via telecast.
- **Online Learning:** Tracks courses that are offered only online (such as Tobonto).

Notes

Prerequisites: Choose pre-requisites from available courses.

Notes

COURSES, cont.

Sections

- **Section Name:** Assign unique names to different sections of the same course.
- **Min Class Size** should be 5 or greater. For exceptions, contact a Program Specialist.
- **Training Hours:** The time an individual participant spends in the course.
- Note about **Start Time, End Time, Days:** Future database enhancements will include multiple fields to enter shadow sessions within the same course section. For now, the **Memo** section may be used for this information.
- **Instructor:** Allows user to identify a specific instructor within a larger Provider.
- **Instructor Hours:** The total amount of time the instructor spends teaching all shadow sessions within the section.
- 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.
- **Waiting List** will display Yes or No according to whether there is a waiting list.
- **Share Section:** Allows 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.

Notes

COURSES, cont.

Rosters

- To add a participant to the roster, click **New Roster Entry**, search for participant, check.
- **Complete = Yes:** When checked, the record shows on completed report. When course is a prerequisite for another course, checking completed shows the participant has met the pre-requisite.
- **Complete = No:** Participant's account WILL be charged for the course.
- **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.
- **Print Roster List** and **Print Contact List:** Two formatting options for printing the roster.
- To extract email addresses from a roster, copy data from Print Contact List and paste into a spreadsheet.

Notes

Tips and Hints for Courses

- On search screen, check **Exclude Shared** to view only courses hosted by home site. Otherwise the list will include all courses where local participants are enrolled.

Notes

VOUCHERS

Data fields that may require further explanation

Vouchers

- Select **Participant** and **Provider** to search and check.
- **Voucher ID** allows the user to identify a unique code for each voucher. Must be unique.
- Once general information is entered, save to **Add Detail**.
- **Add Detail** separately for Tuition and Books. Add as many detail sections as necessary.
- **Hours** should reflect credit hours, where appropriate.
- Once detail is added, save. Click **Edit** to update **Issue** and **Paid** info.
- **Date of Issue** applies to Expenditures.

Tips and Hints for Vouchers

- The different parts of the Voucher must be added/edited in order.
- On search screen, clicking a provider will list all vouchers associated with that provider. Adding multiple search criteria will narrow the search.

Notes

ACCOUNTS

Data fields that may require further explanation

Expenditures

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

Notes

Budgets

- ICD Headquarters will enter site budgets once approved.
- Search Budget by Category and program year.

Notes

Account Chart: This is a placeholder for future database enhancements.

Notes

ACCOUNTS, Cont.

Program Analysis

Utilization Rate

- $\% \text{ rate} = (\# \text{Active \& Laid-off Enrollments} + \# \text{Active \& Laid-off Vouchers}) \div \text{Total \#Eligible}$
- 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.

Participants Taking Multiple Courses

- # of Active & Laid-off individuals in Customized or Vouchers 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.

Participants Per Category

- Total number of enrollments (entries on rosters, or tuition vouchers) by category.
- % rate is a percentage of the total number of enrollments in Customized Courses PLUS the total number of Tuition Vouchers.
- Can be thought of as total number of seats filled in each category.

Participants Per Customized Course

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

Participants Per Tuition Assistance

- Details the number of Tuition Vouchers 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.

Participation Information

- 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.

Participation Rate

- $\% \text{ rate} = \# \text{ Active \& Laid-off Participants} \div \text{Total \# Eligible Employees}$
- Shows number of eligible members in the program over a given time period.
- Counts each individual only once; attending a Customized course, or approved Voucher.

Dropped Listing Report

- Lists participants who dropped a Customized Course during a given time period.
- To be listed as dropped from a course, "attending" must be UNCHECKED for that participant in that course section roster.

Over \$2000/yr

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

PD Over Limit Report

- 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.

Customized Spending: Details individual spending in Customized Courses for a given time.

Budget Funding: Displays the Annual Budget for a given program year.

Participants Per Plant

- Lists participants by plant; w/expenses in Customized and Vouchers for a given time.
- Individuals with no plant named in Work Data will be grouped together in the report.

Course Details By Category

- Details all Customized Courses, by Category, during a given time period.
- 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 means training hours for participants in the course.
- Enrolled is a count of all participants, including all work statuses.

TA Details By Category

- Lists all Vouchers, with detail, approved, with start date in a given time period.
- Cost/Hr. is from Hours in Voucher detail. Hours are Credit Hours when appropriate.

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.

EXPENDITURES

Data fields that may require further explanation

Expenditures

- On search screen, **Date** is the Committed Date. Not Expended Date.
- **Account:** Select from the appropriate account line.
- **Payee:** Type two letters to activate auto-fill, if Payee already exists in database.
- **Edit** allows user to enter Expenditure when Committed, then return to update when amount is Expended.

Notes

Reimbursements

- Allows user to reimburse the program when funds are accepted into an account.
Example: When an item is returned to the store, the funds can be added back.
- In Accounts reports, Reimbursements appear as *negative* Expenditures.

Notes