



# Database Training

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

DRAFT: 5/10/19

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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 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**

- 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.
    - 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.
- With exception of the Accounts tab, directly below the top tab are open fields for searching.

### **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, 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 approximately 20 minutes of not activity.
- 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.

**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 new participant into the ICD database. The form is titled 'Institute for Career Development' and 'Site Coordinator : Flexville test'. It features a navigation bar with tabs: **Participants**, **Providers**, **Courses**, **Accounts**, **Vouchers**, **Expenditures**, and **Logout**. The form is divided into two main sections: **Personal Data** and **Work Data**. The **Personal Data** section includes fields for Record #, Old ID, Title, First Name, Middle Init, Last Name, Address 1, Address 2, City, State (a dropdown menu labeled 'Select State'), and Zip. The **Work Data** section includes fields for Gender (a dropdown menu labeled 'Unknown'), YTD TA, YTD CC, Home Phone, Cell Phone, Rcv Txt Msgs (a checkbox), Work Phone, E-Mail, Birth Date (MM/DD/YYYY), and Age Range. At the bottom of the form are three buttons: **Save**, **Save and go to ICD Data screen**, and **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.
- 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 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.

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 displays the ICD Data entry interface. At the top left is the ICD logo. The top right shows the text "Institute for Career Development" and "Site Coordinator : Flexville test". Below this is a navigation bar with links: Participants, Providers, Courses, Accounts, Vouchers, Expenditures, and Logout. The main header area shows "New", "Lookup", and "880 : Sandy Smith". The left sidebar contains a list of tabs: Personal Data, ICD Data (highlighted), Work Data, Vouchers, Memos, Custom Courses, Credentials, and Status History. The main content area contains the following fields and controls:

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

At the bottom of the form 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 displays the ICD Data entry interface. At the top left is the ICD logo (United Steelworkers Participating Companies). At the top right, it says 'Institute for Career Development' and 'Site Coordinator : Flexville test'. Below this is a navigation bar with links: Participants, Providers, Courses, Accounts, Vouchers, Expenditures, and Logout. The main header shows '882 : Sandy Smith'. On the left is a sidebar with buttons: New, Lookup, Personal Data, ICD Data, Work Data (highlighted in red), Vouchers, Memos, Custom Courses, Credentials, and Status History. The main content area contains the following fields:

- Badge #: [Yellow highlighted text box]
- Plant: [Text box]
- Department: [Text box]
- Occupation: [Text box]
- Local Union: [Text box]
- ☐ Represented?
- Life Time TA: \$0.00
- Life Time CC: \$0.00
- Entry Date: 8/22/2017
- Update Date: 8/22/2017
- User: Site Coordinator

At the bottom of the form are three buttons: Save, Save and go to Personal Data screen, and Cancel.

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

- **Badge #** is a required field. Can be any identifying number, according to local usage.
- **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.

### **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](http://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**.



- 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**.



Institute for Career Development

Korey Fiste : Flexville test

**Participants**
Providers
Courses
Accounts
Vouchers
Expenditures
Admin
Logout

Personal Data

ICD Data

Work Data

Vouchers

Memos

Custom Courses

Credentials

Status History

Mobile Login

994 : Johnny Doe

Login:

Password:

Repeat Password:

Enabled: ☒


Login Requirements: At least one capital and lower case letter and one number and contain six or more characters.  
Password Requirements: At least one capital and lower case letter and one number and contain four or more characters.

- 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 State. The list of providers is specific to your site.



Institute for Career Development  
Site Coordinator : Flexville test

Participants **Providers** Courses Accounts Vouchers Expenditures Logout

New Lookup

Provider ID:  Provider Name:    
City:  State:

	ID	Name	City	State
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:

UNITED STATES WORKERS  
**ICD**  
EMPLOYMENT SERVICES

Institute for Career Development  
Site Coordinator : Flexville test

Participants Providers Courses Accounts Vouchers Expenditures Logout

New Lookup

Provider ID: [highlighted in yellow]

Name: [highlighted in yellow]

Address 1: [text box]

Address 2: [text box]

City: [text box]

State: Select State [dropdown] Zip: [text box]

Taxpayer ID: [text box]

Contact Person: [text box]

Phone: NNN-NNN-NNNN

Fax: NNN-NNN-NNNN

E-Mail: [text box]

In House: ☐

Tuition Assistance: ☐

Custom: ☐

Other: ☐

YTD CC: [text box]

YTD TA: [text box]

Save Cancel

#### *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. 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

## COURSES

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



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:

Exclude Shared From Other Locs: ☐

Exclude Closed: ☐

	<u>Name</u>	<u>Shared</u>	<u>School</u>	<u>Category</u>	<u>LastEndDate</u>
<input type="button" value="Select"/>	Class 1	73: Mittal- Boatmen	icd office	Pre-Technical Skills	2/2/2015
<input type="button" value="Select"/>	Conflict Resolution 5/5/14		ABC Training	Personal Development	
<input type="button" value="Select"/>	Database Training		A#1 Computers	Computers	4/30/2014
<input type="button" value="Select"/>	Deleting		A#1 Computers	Computers	
<input type="button" value="Select"/>	Green Energy Seminar		ABC Training	Personal Development	7/5/2017
<input type="button" value="Select"/>	Health 4		XYZ Community College (TA &Custom)	Personal Development	
<input type="button" value="Select"/>	Introduction to the Internet		A#1 Computers	Computers	6/24/2014
<input type="button" value="Select"/>	Korey		XYZ Community College (TA &Custom)	Pre-Technical Skills	10/1/2017
<input type="button" value="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 'New Course' form in the ICD system. The form is titled 'Course Info' and is located under the 'Courses' tab. The form fields are as follows:

- Course Name:** A text input field with a yellow highlight.
- Provider:** A drop-down menu with '(None)' selected.
- Category:** A drop-down menu with '(None)' selected.
- Sub Category:** A drop-down 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 with a navigation bar at the top containing 'Participants', 'Providers', 'Courses', 'Accounts', 'Vouchers', 'Expenditures', and 'Logout'. The 'Courses' tab is currently selected. The application is titled 'Institute for Career Development' and 'Site Coordinator : Flexville test'.

### 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:** Check if the course is available via telecast.
- Online Learning:** Tracks courses that are offered only online (such as Rosetta Stone).

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.



Institute for Career Development  
Site Coordinator : Flexville test

Participants Providers **Courses** Accounts Vouchers Expenditures Logout

New Lookup

**Course Info**

HVAC 2

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.

Add Course Edit Course Delete Course

Sections: Add Section

Add Prerequisite

Notes

### Creating a class section within a course

- Click on **Add Section**. The following screen should appear:

UNITED STEELWORKERS  
**ICD**  
PARTICIPATING COMPANIES

Institute for Career Development  
Site Coordinator : Flexville test

Participants Providers **Courses** Accounts Vouchers Expenditures Logout

New Lookup

**Course Info**  
**Sections**

**HVAC 2**

Section Name:

Start Date:

End Date:

Min Class Size:

Max Class Size:

Training Hours:

Location:

Start Time:

End Time:

Days: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Instructor:

Instructor Hours:

Course Memo:

☒ Cost Per Participant  
☐ Flat Rate

Number Enrolled:

Per Participant Fee:

Flat Rate Fee:

Books/Mtrls:

Total Cost:

Cost to Participant:

Provider:

Waiting List:

Shared:

Days:

Save Cancel Share Section

- 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 number of training hours an individual participant will receive by attending the section.
- Location:** Where the training takes place.
- 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 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.

- 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**  
INTEGRATING COMPANIES

Institute for Career Development  
Site Coordinator : Flexville test

Participants
Providers
Courses
Accounts
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Logout

New

Lookup

Course Info

Sections

**HVAC 2 : Fall 2017 : ABC Training**

Section Name: Fall 2017

Start Date: 10/16/2017

End Date: 11/27/2017

Min Class Size: 5

Max Class Size: 15

Training Hours: 14

Location: Learning Center

Start Time: 01:00 PM

End Time: 03:00 PM

Days: Mon

Instructor: Mr. Air

Instructor Hours: 30.00

Course Memo: This class is also shadowed from 5:00PM - 7:00PM

Cost Basis: P: Per participant

Number Enrolled: 0

Per Participant Fee: \$300.00

Flat Rate Fee:

Books/Mtrls: \$50.00

Total Cost: \$0.00

Cost to Participant: \$350.00

Provider: 64 : ABC Training

Waiting List: no

Shared: no

Edit

Back to Course


Done

Share Section



### ***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.



Institute for Career Development  
Site Coordinator : Flexville test

Participants Providers **Courses** Accounts Vouchers Expenditures Logout

New Lookup

**Course Info**

HVAC 2

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.  

Add Prerequisite

Add Course Edit Course Delete Course

Sections: Add Section

	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**.



**ICD**  
INTEGRATING COMPANIES

Institute for Career Development  
Site Coordinator : Flexville test

Participants
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[Course Info](#)

[Sections](#)

[Rosters](#)


HVAC 2 : Fall 2017 : ABC Training

Seats available: 15
Wait list: no

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

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's 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.



**ICD**  
INSTITUTE FOR CAREER DEVELOPMENT

Institute for Career Development  
Site Coordinator : Flexville test

Participants
Providers
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Logout

New    Lookup

**Course Info**

**Sections**

**Rosters**

**HVAC 2 : Fall 2017 : ABC Training**

Seats available: 12      Wait list: no

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

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.



**ICD**  
INSTITUTE FOR CAREER DEVELOPMENT

Institute for Career Development  
Site Coordinator : Flexville test

Participants
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[Course Info](#)

[Sections](#)

[Rosters](#)

**HVAC 2 : Fall 2017 : ABC Training**

Participant: 730

Badge Nbr: 29

Amt Available: \$1,550.00

Enrolled Date: 10/18/2017

Notes

Avis Aaker

Degree Seeking: no

Passed Course: no


Attending: yes

Completed Course: no

Notes

## 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

New Lookup

Last Name:  Provider Name:  Number:   
Voucher ID:  Status: (ALL)

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

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.

Save Cancel

- 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**.

### Notes

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



Institute for Career Development  
Site Coordinator : Flexville test

Participants Providers Courses Accounts **Vouchers** Expenditures Logout

New Lookup

914 : 639C : Andy Anderson : Oaky Tech

Vouchers

Course/Book Name: Math 401

Books/Tuition: ☒ Tuition ☐ Books

Course Subcategory: Math/Science

Online Learning: ☐ Degree Seeking: ☐

Hours: 2

Cost/Hour: \$25.00

Tuition/book cost: \$50.00

Taxes/fees:

Total Cost: \$50.00

Compute Costs

Available Amt: \$50.00

Issue Amount: \$50.00


Funding Category: Standard Courses

Save Cancel

- **Add Detail** separately for Tuition and Books. Add as many detail sections as necessary.
- Enter the **Course Name** or **Book**.
- Select either **Tuition** or **Books**.
- Select a **Course Subcategory** that best applies.
- If **Online Learning** check and/or **Degree Seeking** check.
- **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.



Institute for Career Development  
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Participants
Providers
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Admin
Logout

**914 : 639C : Andy Anderson : Oaky Tech**

**Vouchers**

Participant **Andy Anderson**      Provider **Oaky Tech**  
 Application Date: **10/19/2017**    Voucher ID: **639C**    Start/End Date: **10/30/2017**    **11/30/2017**  

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

 Vchr Issued: **no**      Paid Amt: **\$0.00**      Paid Date:  
 Amt Avail: **\$2,450.00**      Tuition + Books: **\$50.00**      Total Fees: **\$0.00**  
 Total Amt: **\$50.00**      Issue Amt: **\$50.00**      Issue Date:  
 YTD Paid TA **\$0.00**      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*

- The different parts of the Voucher must be added/edited in order.
- 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.
- To edit and/or delete a voucher, the paid amount must be edited to \$0.
- Voucher dollar amounts **are not** entered as an expenditure within the **Expenditure** tab.



## **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 site budgets once approved.
- 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 a percentage of the total number of enrollments in Customized Courses PLUS the total number of class enrollments within Tuition Vouchers.
- 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 a percentage of the total number of enrollments in Customized Courses, 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.

### 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.

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

**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.

**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.

**Expenditure Detail**

- 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.

## 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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New Lookup

**Expenditure**

**Expenditures**  
Reimbursemts

PO Number:   
Payee:   
Begin Date:

Search Expenditures

Account:

End Date:

	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 'Institute for Career Development' system. It includes a navigation bar with 'Participants', 'Providers', 'Courses', 'Accounts', 'Vouchers', 'Expenditures', and 'Logout'. The 'Expenditures' tab is selected. The form has fields for 'Account' (a dropdown menu with 'Select Account'), 'Payee' (a text field), 'Committed' (Amount and Date), and 'Expended' (Amount and Date). There is also a 'Memo' field and '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 note can be added, i.e. the invoice number or explanation.
- 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.**

#### *Reimbursements*

- Allows user to reimburse 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, reimbursements appear as *negative* expenditures.

Notes

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