CTE Registration System Manual

Contents

Getting Started

What is CTE Registration System?

CTE Registration System allows Southern Polytechnic State University faculty to view and register for workshops, submit workshops to host, and track professional development. The calendar and list of workshops is viewable without registering, but it is necessary to create an account with an SPSU email address to register, create workshops, and view reports.

Roles

The system supports the roles of Participant, Presenter, Auditor, Admin, and Superadmin.
The default role for a newly registered user is Participant, which allows viewing and registering for workshops. To change your account to a different role, you need to contact an Admin or Superadmin. If you are a faculty member who is leading a program or presenting a workshop, you need to request the Presenter role. If you are the head of a department or a dean and want to track the professional development of the faculty in your department or departments, you need to request the Auditor role.

	Permissions					
Roles	View and register for workshops	Manage personal account information	Manage workshops	View workshop/ reports	Manage Participant, Presenter, & Auditor accounts	Manage Admin & Superadmin accounts
Participant	✔	✔		✔		
Presenter	✔	✔	✔	✔		
Auditor	✔	✔		✔		
Admin	✔	✔	✔	✔	✔	
Superadmin	✔	✔	✔	✔	✔	✔

Professional Development Units (PDUs)

Professional development is reflected in earning Professional Development Units (PDUs). A standard workshop is worth about 0.01 PDUs per hour. The amount a workshop is worth in PDUs displays in the workshop's details. Information about how many PDUs a user has earned is in their transcript, located in Reports.

System Requirements

Browser	Microsoft Internet Explorer 7.0, Mozilla Firefox 3.6
Operating System	Any 32-bit or 64-bit OS
Processor	1.3 GHz
Memory	512MB RAM

Viewing Public Calendar and Workshops

Step 1 Type **http://verifyproject.com/** into your browser's navigation bar.

Step 2 In the upper right, there is a button that toggles between **Return to Calendar View** and **Workshops**. Click it to toggle between viewing the workshops in list format, and displaying the workshops in a calendar or agenda format.

> **NOTE:** Clicking on a Register link or Registration icon brings you to the Log In screen. From there you can log in or register. Users who already have accounts are immediately registered after logging in.

Creating an Account

Step 1 Type **http://verifyproject.com/Account/Login** into your browser's navigation bar.

Step 2 Click the **Register** link.

Step 3 Type your SPSU email address into the **User Email** field.

Step 4 Choose a password and enter it into the **Password** and **Confirm password** fields.

> **NOTE:** Please do not use the same password as you use in Zimbra.

Step 5 Enter your phone number into the **Phone Number** field.

Step 6 Enter an alternate phone number into the **Alternate Phone Number** field.

Step 7 Enter your first name into the **First Name** field.

Step 8 Enter your last name into the **Last Name** field.

Step 9 Click the **Register** button.

Step 10 In a few minutes, check your email to get your password. This is the password you will use to log into the system.

> **NOTE:** To prevent your password and other information getting sent to spam, please add @.com to your email contacts.

Logging In

Step 1 Type **http://verifyproject.com/Account/Login** into your browser's navigation bar.

> **NOTE:** You can also access this page by clicking the **Log In** link in the upper right hand corner of the page at **http://verifyproject.com**.

Step 2 Type your **SPSU email** into the **Email Address** field.

Step 3 Type your **password** into the **Password** field.

Step 4 Check the box next to **Remember me?** if you are on a private computer and want the computer to remember your credentials.

Step 5 Click the **Log in** button.

Changing Your Password

Step 1 Click **MY ACCOUNT** from the main menu.

Step 2 Select **Change My Password** from the left-hand menu.

Step 3 Enter your current password into the **Current password** field.

Step 4	Enter your new password into the **New password** field.
Step 5	Enter your new password a second time into the **Confirm password** field.
Step 6	Click the **Change Password** button.

Logging Out

Step 1	Click the **Logoff** link in the upper right-hand corner.

Recovering Your Password

Step 1	Type **http://verifyproject.com/Account/Login** into your browser's navigation bar.
Step 2	Click the **Retrieve Password** link.
Step 3	Type your SPSU email address into the **Email Address** field.
Step 4	Click the **Retrieve Password** button.
Step 5	A new email with the subject **Password Recovery** will appear in your inbox. Open it and click the link inside.
Step 6	Enter your new password into the **New Password** field.
Step 7	Click the **Reset Password** button.

Participant Role

What is the Participant Role?

The Participant role is the default role. This role gives a user permission to view, register for workshops, and attend workshops. The user and their department head can view their transcripts, evidentiary reports, and certificates. The department head can view their registrations and attendance reports.

Home

Your home screen has three panels, **Registered Topics**, **News Bulletins**, and **Upcoming Topics**. This screen helps you keep track of your registrations and easily register or cancel registration for workshops.

Searching Upcoming Topics

Step 1	Type the workshop name, date, or location into the **Search** field in the upper right of the **Upcoming Topics** panel. The list will automatically filter when you stop typing.
Step 2	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting Upcoming Topics

Step 1	Click the column headers. (ex: Event, Location).
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Viewing Details for Upcoming Topics

Step 1	Click **+** icon in the **Details** column of the topic you want to view in the **Upcoming Topics** list.
Step 2	Click the **Close** button.

Registering for Upcoming Topics

Step 1	Click **+** icon in the **Details** column of the topic you want to view in the **Upcoming Topics** list.
Step 2	Click the **Register** button. You will receive a confirmation email letting you know you successfully registered.

Viewing Details for Registered Topics

Step 1	Click the **Details** link in the **Registered Topics** panel for the topic you want to view.
Step 2	Click the **Close** button.

Cancelling Registration

Step 1	Click the **Details** link in the **Registered Topics** panel for the topic you want to cancel registration.
Step 2	Click the **Cancel Registration** button to cancel your registration.

Step 3	Provide your reason for cancelling registration in the prompt.
Step 4	Click the **OK** button in the confirmation window.

Viewing News

Step 1	Click **+** icon in the **Details** column in the **News Bulletins** panel for the news you want to view.
Step 2	Once you have read the news, click the **Close** button.

Searching News

Step 1	Type the search terms into the **Search** field in the upper right of the **News Bulletins** panel. The list will automatically filter when you stop typing.
Step 2	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting News

Step 1	Click the column headers in the **News List** (ex: Program, Date).
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Managing Workshops

A workshop is an event within a program on a topic that faculty can register for and attend. Workshops have a designated number of seats, if more people register than the available number of seats, excess participants are placed on a waiting list. These participants will be informed by email if additional seats are made available. Some workshops are worth PDU points. Some workshops include prerequisites that require you to attend previous workshops to register.

Registering for Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click on the **Self Register** icon in the right-most column of **List of Workshops** for the desired workshop.
Step 3	In the confirmation message, click **OK**. You will receive a confirmation email notifying you that you registered. **NOTE:** If the workshop is full, you are given the option to be added to the Waiting List. You cannot register for two different workshops at the same time, nor two of the same workshop at different times.

Filtering Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	The **Filter** menu is at the left side of the screen. Enter your search terms into the field in the **Keyword** submenu.
Step 3	Select the checkboxes for the program or programs whose workshops you want to view in the **Program** submenu.
Step 4	Click the **Calendar** icon for the **Start Date** field in the **Dates** submenu.

Step 5	Choose the earliest calendar day you want to attend a workshop.
Step 6	Click the **Calendar** icon for the **End Date** field in the **Dates** submenu.
Step 7	Choose the latest calendar day you want to attend a workshop.

> **NOTE:** You can start your search over, or start a new search, at any time by clicking the **Clear Filter** button.

Sorting Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Filter the workshops using the left-hand menu.
Step 3	Click on the column headers (ex: Class, Time, or Seats).
Step 4	The list sorts numerically, alphabetically, or chronilogically in ascending or descending order.

Saving Workshop List

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **PDF** button to save as PDF or the **Excel** button to save as an Excel spreadsheet.
Step 3	Select the location on your computer to save the file.
Step 4	Click the **Save** button.

Printing Workshop List

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **Print** button.
Step 3	Press the **Ctrl** and **P** keys on your keyboard at the same time (**Ctrl+P**) to open the print dialog on your computer.
Step 4	Click the **OK** button to print out the list.
Step 5	Press the **ESC** key.

Managing Your Account

Account information includes your SPSU email address, name, phone number, role, user type, audit information, and password.

Updating Your User Profile

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Edit the **User Name** field with your SPSU email address.
Step 3	Edit the **First Name** field with your first name.
Step 4	Edit the **Last Name** field with your last name.
Step 5	Choose your correct department from the **Department** drop-down menu.
Step 6	Edit the **Phone Number** field with your phone number.
Step 7	Edit the **Alternate Phone Number** field with your alternate phone number.

Step 8	Click the **Save** button.

Viewing User Role and User Type

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Select **Update My Account** from the left-hand menu.
Step 3	Open the **Roles and User Types** tab.
Step 4	View your role and user type.

Viewing Your Audit Info

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Click the **Audit Info** tab.
Step 3	View the dates the account was created and last modified.

Changing Your Password

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Select **Change My Password** from the left-hand menu.
Step 3	Enter your current password into the **Current password** field.
Step 4	Enter your new password into the **New password** field.
Step 5	Enter your new password a second time into the **Confirm password** field.
Step 6	Click the **Change Password** button.

Managing Reports

There are three kinds of reports available to the Participant role:

- *Transcripts* include information on what workshops you attended and how many PDUs you earned for them.
- *Evidentiary* reports are proof that you attended the workshop which can be used for evaluation and promotion.
- *Certificates of Completion* look like a conventional certificate, bearing your name, the title of the workshop and program, PDUs earned, and director signatures.

Viewing Your Transcripts

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Transcripts** from the left-hand menu.
Step 3	Click the **Show Report** button.
Step 4	Click the **PDF** button.

Viewing Your Evidentiary Report

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Evidentiary** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.

Step 5	Click the **Show Report** button.
Step 6	Click on the **Evidentiary Report** button for the workshop

Viewing Your Certificate

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Certificate** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **Certificate** button.

Using the Calendar

The calendar is visible both when logged out and logged in. However, when logged into the system you have the option of registering and cancelling registration directly from the calendar. You also have the option to export events you are registered for to your Google or Outlook calendar.

Viewing the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Choose to view the calendar by month, week, or day by clicking the **month**, **week**, or **day** button on the top right of the calendar.
Step 4	Click the left and right arrows below the drop-down menu to move backwards and forwards through the month, week, or day.

Registering from the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the color coded event you want to register for.
Step 3	Click the **Register** link.
Step 4	Click the **OK** button in the confirmation message.

Exporting the Calendar

NOTE: You must be registered for an event before you have the option to export it to your calendar.

Exporting to Google Mail

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the desired event from the Calendar.
Step 3	Click the **Export to Google Calendar** link.
Step 4	Enter your email address into the **Email** field.
Step 5	Enter your password into the **Password** field.
Step 6	Click the **Export** button.

Step 7	The appointment appears in your Google Calendar.

Exporting to Outlook

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Click the **Export to Outlook** link.
Step 4	You will be prompted to open or save the file. Choose the radio button for **Save**.
Step 5	Choose the desired location on your computer and click **OK**.
Step 6	Use Outlook to import the .ics file.

Presenter Role

What is the Presenter Role?

The Presenter role has the same permissions as Participant, with the addition of the ability to create workshops. Once created, workshops are approved or disapproved by an Admin or Superadmin. The system will automatically send you an email with information about your workshop's approval or disapproval and any notes from the Admin/Superadmin. A presenter with a disapproved workshop may make edits and resubmit the workshop for approval. Presenters are able to view reports about registration and attendance to their past and current workshops.

Home

Your home screen has four panels, **New Workshops**, **Registered Topics**, **News Bulletins**, and **Upcoming Topics**. This screen helps you keep track of your workshop approvals, registrations and easily register or cancel registration for workshops.

Editing New Workshops

Your recently created workshops appear in the New Workshops panel. They may have three statuses: Pending Approval, Disapproved, and Approved.

- *Pending Approval* indicates the admin has not yet taken action on your submitted workshop. You may edit your workshop as you wish.
- *Disapproval* indicates the admin has noticed a problem with your workshop as submitted. Consult View History on your workshop to see notes from the administrator and make the necessary changes.
- *Approval* indicates that the admin has accepted your workshop as is, and participants may register for and attend your workshop. You can no longer edit Approved workshops and will need to contact the administrator if changes need to be made.

Whenever you make edits to Disapproved workshops, your workshop will return to Pending Approval status until reviewed by an administrator.

Step 1	Click the **Edit** icon for the workshop in the **New Workshops** panel.
Step 2	Select the workshop from the **List of Workshops**.
Step 3	Click **Edit**.
Step 4	Change the semester from the **Semester** drop-down menu.
Step 5	Change the location from the **Location Name** drop-down menu.
Step 6	Edit the number of seats available into the **Seating** field.
Step 7	Edit the URL to video in the **Video URL** field.
Step 8	Select the audience from the **Audience** drop-down menu.
Step 9	Edit the date on which you want to present in the **Topic Date** field.
	Edit the starting time of the workshop in the **Time Start** field.
Step 10	Edit the ending time of the workshop in the **Time End** field.
	NOTE: The **Duration** field will auto populate based on the values selected for start time and end time. This field may be edited if necessary.

Searching Upcoming Topics

Step 1	Type the workshop name, date, or location into the **Search** field in the upper right of the **Upcoming Topics** panel. The list will automatically filter when you stop typing.
Step 2	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting Upcoming Topics

Step 1	Click the column headers. (ex: Event, Location).
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Viewing Details for Upcoming Topics

Step 1	Click **+** icon in the **Details** column of the topic you want to view in the **Upcoming Topics** list.
Step 2	Click the **Close** button.

Registering for Upcoming Topics

Step 1	Click **+** icon in the **Details** column of the topic you want to view in the **Upcoming Topics** list.
Step 2	Click the **Register** button. You will receive a confirmation email letting you know you successfully registered.

Viewing Details for Registered Topics

Step 1	Click the **Details** link in the **Registered Topics** panel for the topic you want to view.
Step 2	Click the **Close** button.

Cancelling Registration

Step 1	Click the **Details** link in the **Registered Topics** panel for the topic you want to cancel registration.
Step 2	Click the **Cancel Registration** button to cancel your registration.
Step 3	Provide your reason for cancelling registration in the prompt.
Step 4	Click the **OK** button in the confirmation window.

Viewing News

Step 1	Click **+** icon in the **Details** column in the **Registered Topics** panel for the topic you want to view.
Step 2	Once you have read the news, click the **Close** button.

Searching News

Step 1	Type the search terms into the **Search** field in the upper right of the **News Bulletins** panel. The list will automatically filter when you stop typing.
Step 2	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting News

Step 1	Click the column headers in the **News List** (ex: Program, Date).
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Managing Workshops

A workshop is an event within a program on a topic that faculty can register for and attend. Admins may assign your workshop a value in PDUs. Presenters can designate the number of seats; if more people register than the available number of seats, excess participants can be placed on a waiting list. These participants will be informed by email when additional seats are made available. Presenters can add prerequisite workshops that require the participant to attend previous workshops to register.

Creating New Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click on the **+** icon below **List of Workshops**.
Step 3	Enter the name of the topic in the **Topic Name** field.
Step 4	Select the name of the program from the **Program Name** drop-down menu.
Step 5	To add prerequisites, click on the **+** icon.
Step 6	In the **Add Prerequisites** pop-up window, select the program name from the **Program Name** drop-down list.
Step 7	Select the check boxes for prerequisite topics to add.
Step 8	Click the **OK** button.
	NOTE: You can remove prerequisites you have added to the workshop by clicking the **x** icon and unchecking the check boxes for the prerequisites you don’t want.
Step 9	Enter the description of the workshop in the **Description** field.
Step 10	Click the **Save** button.
Step 11	Click **Workshop Detail (Step – II)** tab from the top of the screen
Step 12	Click the **Create** button.
Step 13	Select the semester from the **Semester** drop-down menu.
Step 14	Select the location from the **Location Name** drop-down menu.
Step 15	Enter the number of seats available into the **Seating** field.
Step 16	Enter the URL to video in the **Video URL** field.
Step 17	Select the audience from the **Audience** drop-down menu.
Step 18	Enter the date on which you want to present in the **Topic Date** field.
Step 19	Enter the starting time of the workshop in the **Time Start** field.

Step 20	Enter the ending time of the workshop in the **Time End** field. **NOTE:** The **Duration** field will auto populate based on the values selected for start time and end time. This field may be edited if necessary.
Step 21	Select the presenter from the **Presenter** drop-down list.
Step 22	Click the **Save** button.
Step 23	Click the **Return to Events** button.

Editing Workshops

NOTE: Once your workshop is approved by an administrator, you will be unable to make further edits to the workshop.

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshops**.
Step 3	Edit the name of the topic in the **Topic Name** field.
Step 4	Select the name of the program from the **Program Name** drop-down menu.
Step 5	To add prerequisites, click on the **+** icon.
Step 6	In the **Add Prerequisites** pop-up window, select the program name from the **Program Name** drop-down list.
Step 7	Check the boxes for the prerequisite topics to add.
Step 8	Click the **OK** button.
Step 9	Edit the description of the workshop in the **Description** field.
Step 10	Click the **Save** button.

Step 11	Click **Workshop Detail (Step – II)** tab from the top of the screen
Step 12	Click the row of the workshop detail you want to edit.
Step 13	Click the **Edit** button.
Step 14	Select the semester from the **Semester** drop-down menu.
Step 15	Select the location from the **Location Name** drop-down menu.
Step 16	Edit the number of seats available into the **Seating** field.
Step 17	Edit the URL to video in the **Video URL** field.
Step 18	Select the audience from the **Audience** drop-down menu.
Step 19	Edit the date on which you want to present in the **Topic Date** field.
Step 20	Edit the starting time of the workshop in the **Time Start** field.
Step 21	Edit the ending time of the workshop in the **Time End** field. **NOTE:** The **Duration** fields will auto populate based on the values selected for start time and end time. This field may be edited if necessary.
Step 22	Click the **Save** button.
Step 23	Click the **Return to Events** button.

Uploading Files to Workshops

Step 1	Click **WORKSHOPS** from the main menu.

Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshop**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop from the **List of Workshops**.
Step 5	Click the **Upload File** button.
Step 6	Click the **Browse** button.
Step 7	Select the file on your computer and click **OK**.
Step 8	Click the **Upload** button.
Step 9	Click the **OK** button in the prompt.

Viewing Workshop Files

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshop**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop from the **List of Workshops**.
Step 5	Click **View Files** button.
Step 6	Click the **Download** link for the files you want to view.
Step 7	Click the **Close** button.

Viewing History

History includes approval or disapproval notes.

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshop**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop from the **List of Workshops**.
Step 5	Click the **View History** button.
Step 6	Click the **Close** button.

Registering for Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click on the **Self Register** icon in the right-most column of the **List of Workshops** for the desired workshop.
Step 3	In the confirmation message, click **OK**. You will receive a confirmation email notifying you that you registered.

> **NOTE:** If the workshop is full, you may be given the option to be added to the Waiting List. You cannot register for two different workshops at the same time, nor two of the same workshop at different times

Filtering Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	The Filter menu is at the left side of the screen. Enter your search terms into the field in the **Keyword** submenu. The results will automatically display when you stop typing.

Step 3	Select the checkboxes for the program or programs whose workshops you want to view in the **Program** submenu.
Step 4	Click the **Calendar** icon for the **Start Date** field in the **Dates** submenu.
Step 5	Choose the earliest calendar day of the workshops you want to view.
Step 6	Click the **Calendar** icon for the **End Date** field in the **Dates** submenu.
Step 7	Choose the latest calendar day of the workshops you want to view.

> **NOTE:** You can start your search over, or start a new search, at any time by clicking the **Clear Filter** button.

Sorting Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Filter the workshops using the left-hand menu.
Step 3	Click on the column headers (ex: Class, Time, or Seats).
Step 4	The list sorts numerically, alphabetically, or chronilogically in ascending or descending order.

Saving Workshop Lists

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **PDF** button to save as PDF or the **Excel** button to save as an Excel spreadsheet.
Step 3	Select the location on your computer to save the file.
Step 4	Click the **Save** button.

Printing Workshop Lists

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **Print** button.
Step 3	Press the **Ctrl** and **P** keys on your keyboard at the same time (**Ctrl+P**) to open the print dialog on your computer.
Step 4	Click the **OK** button.
Step 5	Press the **ESC** key.

Managing Your Account

Account information includes your SPSU email address, name, phone number, role, user type, audit information, and password.

Updating Your User Profile

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Edit the **User Name** field with your SPSU email address.
Step 3	Edit the **First Name** field with your first name.
Step 4	Edit the **Last Name** field with your last name.
Step 5	Choose your correct department from the **Department** drop-down menu.

Step 6	Edit the **Phone Number** field with your phone number.
Step 7	Edit the **Alternate Phone Number** field with your alternate phone number.
Step 8	Click the **Save** button.

Viewing Your User Role and User Type

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Open the **Roles and User Types** tab.
Step 3	View your user roles and user type information.

Viewing Your Audit Info

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Click the **Audit Info** tab.
Step 3	View the dates your account was created and last modified.

Changing Your Password

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Select **Change My Password** from the left-hand menu.
Step 3	Enter your current password into the **Current Password** field.
Step 4	Enter your new password into the **New Password** field.
Step 5	Enter your new password a second time into the **Confirm Password** field.
Step 6	Click the **Change Password** button.

Managing Reports

There are six kinds of reports available to the Presenter role:

- *Registration* reports include information on who is registered for which workshops.
- *Evidentiary* reports are proof that you attended the workshop which can be used for evaluation and promotion.
- *Certificates of Completion* are standard certificates with your name, the title of the workshop and program, PDUs earned, and signed off with director signature.
- *Sign In* sheets include information about who signed in as attended to your workshops.
- *Transcripts* include user name, workshop name, date of completion, and number of PDUs.
- *Show/No-show* reports include information participant attendance.

Viewing Registration Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Registrations** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Select the user from the **User** drop-down list.
Step 6	Click the **Show Report** button.
Step 7	Click the **PDF** button.

Viewing Sign In Sheets

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Sign In Sheet** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **PDF** button.

Viewing Transcripts

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Transcripts** from the left-hand menu.
Step 3	Select the user from the **User** drop-down list.
Step 4	Click the **Show Report** button.
Step 5	Click the **PDF** button.

Viewing Evidentiary Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Evidentiary** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **Evidentiary Report** button.

Viewing Certificates

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Certificate** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **Certificate** button.

Viewing Show/No-Show Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Show-No-Show to Event** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Select the department from the **Department** drop-down list.
Step 6	Select the radio button for attended or not attended.
Step 7	Click the **Show Report** button.

Step 8	Click the **PDF** button.

Using the Calendar

The calendar is visible both when logged out and logged in. However, when logged into the system you have the option of registering and cancelling registration directly from the calendar. You also have the option to export events you are registered for to your Google or Outlook calendar.

Viewing the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Choose to view the calendar by month, week, or day by clicking the **month**, **week**, or **day** button on the top right of the calendar.
Step 4	Click the left and right arrows below the drop-down menu to move backwards and forwards through the month, week, or day (depends on your calendar view)

Registering from the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the color coded event you want to register for.
Step 3	Click the **Register** link.
Step 4	Click the **OK** button in the confirmation message.

Exporting the Calendar

NOTE: You must be registered for an event before you have the option to export it to your calendar.

Exporting to Google

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the desired event from the Calendar.
Step 3	Click the **Export to Google Calendar** link.
Step 4	Enter your email address into the **Email** field.
Step 5	Enter your password into the **Password** field.
Step 6	Click the **Export** button.
Step 7	The appointment appears in your Google Calendar.

Exporting to Outlook

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Click the **Export to Outlook** link.
Step 4	You will be prompted to open or save the file. Choose the radio button for **Save**.

Step 5	Choose the desired location on your computer and click **OK**.
Step 6	Use Outlook to import the .ics file.

Auditor Role

What is the Auditor Role?

The Auditor role allows you to see information, such as PDUs earned, for the participants and presenters within your department. You cannot create workshops, but you can register for them and view the reports of users in your department.

Home

Your home screen has three panels, **Registered Topics**, **News Bulletins**, and **Upcoming Topics**. This screen helps you keep track of your registrations and easily register or cancel registration for workshops.

Searching Upcoming Topics

Step 1	Type the workshop name, date, or location into the **Search** field in the upper right of the **Upcoming Topics** panel. The list will automatically filter when you stop typing.
Step 2	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting Upcoming Topics

Step 1	Click the column headers. (ex: Event, Location).
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Viewing Details for Upcoming Topics

Step 1	Click **+** icon in the **Details** column of the topic you want to view in the **Upcoming Topics** list.
Step 2	Click the **Close** button.

Registering for Upcoming Topics

Step 1	Click **+** icon in the **Details** column of the topic you want to view in the **Upcoming Topics** list.
Step 2	Click the **Register** button. You will receive a confirmation email letting you know you successfully registered.

Viewing Details for Registered Topics

Step 1	Click the **Details** link in the **Registered Topics** panel for the topic you want to view.
Step 2	Click the **Close** button.

Cancelling Registrations

Step 1	Click the **Details** link in the **Registered Topics** panel for the topic you want to view.
Step 2	Click the **Cancel Registration** button to cancel your registration.
Step 3	Provide your reason for cancelling registration in the prompt.

Step 4	Click the **OK** button in the confirmation window.

Viewing News

Step 1	Click **+** icon in the **Details** column in the **Registered Topics** panel for the topic you want to view.
Step 2	Once you have read the news, click the **Close** button.

Searching News

Step 1	Type the search terms into the **Search** field in the upper right of the **News Bulletins** panel. The list will automatically filter when you stop typing.
Step 2	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting News

Step 1	Click the column headers in the **News List** (ex: Program, Date).
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Managing Workshops

A workshop is an event within a program on a topic that faculty can register for and attend to earn PDUs. Workshops have a designated number of seats, if more people register than the available number of seats, excess participants can be placed on a waiting list. These participants will be informed by email if additional seats are made available. Some workshops include prerequisites that require you to attend previous workshops to register.

Registering for Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click on the **Self Register** icon in the right-most column of List of Workshops for the desired workshop.
Step 3	In the confirmation message, click **OK**. You will receive a confirmation email notifying you that you registered. **NOTE:** If the workshop is full, you may be given the option to be added to the Waiting List. You cannot register for two different workshops at the same time, nor two of the same workshop at different times

Filtering Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	The Filter menu is at the left side of the screen. Enter your search terms into the field in the **Keyword** submenu.
Step 3	Select the checkboxes for the program or programs whose workshops you want to view in the **Program** submenu.
Step 4	Click the **Calendar** icon for the **Start Date** field in the **Dates** submenu.
Step 5	Choose the earliest calendar day of the workshops you want to view.

Step 6	Click the **Calendar** icon for the **End Date** field in the **Dates** submenu.
Step 7	Choose the latest calendar day of the workshops you want to view.

> **NOTE:** You can start your search over, or start a new search, at any time by clicking the **Clear Filter** button.

Sorting Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Filter the workshops using the left-hand menu.
Step 3	Click on the column headers (ex: Class, Time, or Seats).
Step 4	The list sorts numerically, alphabetically, or chronilogically in ascending or descending order

Saving Workshop Lists

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **PDF** button to save as PDF or the **Excel** button to save as an Excel spreadsheet.
Step 3	Select the location on your computer to save the file.
Step 4	Click the **Save** button.

Printing Workshop Lists

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **Print** button.
Step 3	Press the **Ctrl** and **p** keys on your keyboard at the same time (**Ctrl+P**) to open the print dialog on your computer.
Step 4	Click the **OK** button.
Step 5	Press the **ESC** key.

Managing Your Account

Account information includes your SPSU email address, name, phone number, role, user type, audit information, and password.

Updating Your User Profile

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Edit the **User Name** field so that it is your SPSU email address.
Step 3	Edit the **First Name** field so that it is your first name.
Step 4	Edit the **Last Name** field so that it is your last name.
Step 5	Choose your correct department from the **Department** drop-down menu.
Step 6	Edit the **Phone Number** field so that it is your phone number.
Step 7	Edit the **Alternate Phone Number** field so that it is your alternate phone number.
Step 8	Click **Save**.

Viewing Your User Role and User Type

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Open the **Roles and User Types** tab.
Step 3	View your user role and type information.

Viewing Your Audit Info

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Open the **Audit Info** tab.
Step 3	View the dates the account was created and last modified.

Changing Your Password

Step 1	Click **MY ACCOUNT** from the main menu.
Step 2	Select **Change My Password** from the left-hand menu.
Step 3	Enter your current password into the **Current Password** field.
Step 4	Enter your new password into the **New Password** field.
Step 5	Enter your new password a second time into the **Confirm Password** field.
Step 6	Click the **Change Password** button.

Managing Reports

There are six kinds of reports available to the Auditor role:

- *Registration* reports include information on who is registered for which workshops.
- *Evidentiary* reports are proof that you attended the workshop which can be used for evaluation and promotion.
- *Certificates of Completion* are standard certificates with your name, the title of the workshop and program, PDUs earned, and signed off with director signature.
- *Sign In* sheets include information about who signed in as attended to your workshops.
- *Transcripts* include user name, workshop name, date of completion, and number of PDUs.
- *Show/No-show* reports include information about participant attendance.

Viewing Registration Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Registrations** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **PDF** button.

Viewing Sign In Sheets

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Sign In Sheet** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.

Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **PDF** button.

Viewing Transcripts

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Transcripts** from the left-hand menu.
Step 3	Select the user from the **User** drop-down list.
Step 4	Click the **Show Report** button.
Step 5	Click the **PDF** button.

Viewing Evidentiary Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Evidentiary** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **Evidentiary Report** button.

Viewing Certificates

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Certificate** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **Certficate** button.

Viewing Show/No-Show Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Show-No-Show to Event** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Select the department from the **Department** drop-down list.
Step 6	Select the radio button for attended or not attended.
Step 7	Click the **Show Report** button.
Step 8	Click the **PDF** button.

Using the Calendar

The calendar is visible both when logged out and logged in. However, when logged into the system you have the option of registering and cancelling registration directly from the calendar. You also have the option to export events you are registered for to your Google or Outlook calendar.

Viewing the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Choose to view the calendar by month, week, or day by clicking the **month**, **week**, or **day** button on the top right of the calendar.
Step 4	Click the left and right arrows below the drop-down menu to move backwards and forwards through the month, week, or day.

Registering from the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the color coded event you want to register for.
Step 3	Click the **Register** link.
Step 4	Click the **OK** button in the confirmation message.

Exporting the Calendar

NOTE: You must be registered for an event before you have the option to export it to your calendar.

Exporting to Google

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the desired event from the Calendar.
Step 3	Click the **Export to Google Calendar** link.
Step 4	Enter your email address into the **Email** field.
Step 5	Enter your password into the **Password** field.
Step 6	Click the **Export** button.
Step 7	The appointment appears in your Google Calendar.

Exporting to Outlook

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Click the **Export to Outlook** link.
Step 4	You will be prompted to open or save the file. Choose the radio button for **Save**.
Step 5	Choose the desired location on your computer and click **OK**.
Step 6	Use Outlook to import the .ics file.

Admin/Superadmin Role

What are the Admin and Superadmin Roles?

These are the roles with the highest number of privileges. Both the Superadmin and Admin role allow the user the following privileges:

- creating, editing, and deleting of participant, presenter, and auditor accounts,
- editing account details, departments, workshops, and workshop details, and
- approving and disapproving workshop requests.

The Admin and Superadmin are similar in permissions, save that only the Superadmin can create Admin and Superadmin accounts.

Home

Your home page displays four panels:

- New Workshops
- Waiting List for Workshops
- Registered Workshops
- Upcoming and Past Workshops

Managing New Workshops

This panel shows newly created workshops. You can edit, approve, or disapprove workshops. When you approve or disapprove a workshop, you can include a note with an explanation. For disapproved workshops, the presenter can edit their workshop and resubmit for approval.

Viewing and Editing New Workshops

Step 1	Click the **Edit** icon for the workshop in the **New Workshops** panel.
Step 2	Select the workshop from the **List of Workshops**.
Step 3	Click **Edit**.
Step 4	Change the semester from the **Semester** drop-down menu.
Step 5	Change the location from the **Location Name** drop-down menu.
Step 6	Edit the number of seats available into the **Seating** field.
Step 7	Edit the URL to video in the **Video URL** field.
	Select the audience from the **Audience** drop-down menu.
Step 9	Edit the date on which you want to present in the **Topic Date** field.
Step 10	Edit the starting time of the workshop in the **Time Start** field.
Step 11	Edit the ending time of the workshop in the **Time End** field.
	NOTE: The **Duration** field will auto populate based on the values selected for start time and end time. This field may be edited if necessary.

Approving New Workshops

Step 1	Click the **Approve** icon for the workshop in the **New Workshops** panel.
Step 2	Add a note for the Presenter about the approval in the **Note** field. This note will be included in View History for the presenter’s reference.

Step 3	Click the **OK** button.
Step 4	Click the **OK** button in the confirmation message. The approved workshop will leave the **New Workshops** list.

Disapproving New Workshops

Step 1	Click the **Disapprove** icon for the workshop in the **New Workshops** panel.
Step 2	Add a note for the Presenter about the disapproval in the **Note** field. This note will be included in the View History for the presenter's reference.
Step 3	Click the **OK** button.
Step 4	Click the **OK** button in the confirmation message. The disapproved workshop will leave the list of **New Workshops**.

Managing Waiting List

This panel shows workshops that currently have a waiting list. You can add seats or approve additional participants to attend.

Adding Seats to Workshops

Step 1	Select the workshop from the **Waiting List**.
Step 2	Click the **Add More Seats** button.
Step 3	The **Current Number of Seats** will show. Enter the desired number of seats into the **New Number of Seats** field.
Step 4	Click **OK** in the confirmation message. Users who were in the waiting list recieve an email about the new seating availability.
Step 5	Click the **Close** button.

Viewing Waiting List

Step 1	Select the workshop from the **Waiting List**.
Step 2	Click the **Waiting List** button.
Step 3	The list of user names and email appears.
Step 4	Click the **Close** button.

Approving Participants in Waiting List

Step 1	Select the workshop from the **Waiting List**.
Step 2	Click the **Waiting List** button.
Step 3	The list of user names and email addresses appears. Select the checkbox for user(s) you want to approve.
Step 4	Click the **Approve** button.
Step 5	Click the **OK** in the confirmation message.
Step 6	Click the **Close** button.

Disapproving Participants in Waiting List

Step 1	Select the workshop from the **Waiting List**.

Step 2	Click the **Waiting List** button.
Step 3	The list of user names and email addresses appears. Select the checkbox for user(s) you want to disapprove.
Step 4	Click the **Disapprove** button.
Step 5	In the **DisApprove Remarks** field, include a reason for cancelling their registration.
Step 6	Click **OK** in the confirmation message.
Step 7	Click the **Close** button.

Viewing Workshops

Viewing Upcoming Workshops

Step 1	Click the radio button for **Upcoming Workshops** in the **Upcoming and Past Workshops** panel.
Step 2	Select the number of workshops you would like to see from the **Show .. Entries** drop-down list.
Step 3	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Viewing Past Workshops

Step 1	Click the radio button for **Upcoming Workshops** in the **Upcoming and Past Workshops** panel.
Step 2	Select the number of workshops you would like to see from the **Show .. Entries** drop-down list.
Step 3	Click the **First**, **Previous**, **Next**, and **Last** buttons to navigate through the list of topics.

Sorting Upcoming and Past Workshops

Step 1	Click the column headers in the **News List** (ex: Program, Topic)
Step 2	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Managing Catalogs

Catalogs are where you can find create and view lists of users, semesters, audiences, departments, locations, and programs currently available in the system.

Searching Catalogs

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select the type of catalog you want to search from the left-hand menu.
Step 3	Type your search terms in the **Search** field on the top right of the table of entries.
Step 4	When you stop typing, a processing message appears and your refined results appear automatically below.

Sorting Catalogs

Step 1	Click **CATALOGS** from the main menu.

Step 2	Select the type of catalog you want to sort from the left-hand menu.
Step 3	Click on the column headers (ex: Date, or User Type).
Step 4	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Managing User Types

The system automatically provides you with User Types corresponding to roles, Participant, Presenter, Auditor, Admin, and Superadmin, but you can add more User Types to reflect your needs, (ex: Student).

Creating User Types

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **User Type** from the left-hand menu.
Step 3	Click the **Create New** button.
Step 4	Enter a description for the user in the **Description** field.
Step 5	Click the **Save** button.

Editing User Types

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **User Type** from the left-hand menu.
Step 3	Click the **Edit** button.
Step 4	Enter a description for the user in the **Description** field.
Step 5	Click the **Save** button.

Deleting User Types

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select the **User Type** from **List of User Types**.
Step 3	Click the **Delete** button.
Step 4	Click the **Delete** button in the confirmation message.

Managing Semesters

Semesters in the system correspond to the semesters of the academic calendar (ex: Fall 2013).

Creating Semesters

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Semester** from the left-hand menu.
Step 3	Click the **Create New** button.
Step 4	Enter a description of the semester in the **Description** field.
Step 5	If this is the current semester, select the checkbox for **Default Option**, otherwise leave unchecked.
Step 6	Click the **Save** button.

Editing Semesters

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Semester** from the left-hand menu.
Step 3	Select the **Semester** from the **List of Semesters**.
Step 4	Click the **Create New** button.
Step 5	Edit the description of the semester in the **Description** field.
Step 6	If this is the current semester, select the checkbox for **Default Option**, otherwise leave unchecked.
Step 7	Click the **Save** button.

Deleting Semesters

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Semester** from the left-hand menu.
Step 3	Select the **Semester** from the **List of Semesters**.
Step 4	Click the **Delete** button.

Managing Audiences

Audiences are the targeted group for the workshop, (ex: D2L users, administration, ETCMA department).

Creating Audiences

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Audience** from the left-hand menu.
Step 3	Click the **Create New** button.
Step 4	Enter a description of the **Audience** in the **Description** field.
Step 5	If this is the current audience select the checkbox for **Default Option**, otherwise leave unchecked.
Step 6	Click the **Save** button.

Editing Audiences

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Audience** from the left-hand menu.
Step 3	Select the **Audience** from the **List of Audiences**.
Step 4	Click the **Create New** button.
Step 5	Edit the description of the audience in the **Description** field.
Step 6	If this is the current audience, select the checkbox for **Default Option**, otherwise leave unchecked.
Step 7	Click the **Save** button.

Deleting Audiences

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Audience** from the left-hand menu.
Step 3	Select the **Audience** from the **List of Audiences**.
Step 4	Click the **Delete** button.

Managing Departments
Departments are organizations on campus (ex: ETCMA department, CTE).

Creating Departments

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Department** from the left-hand menu.
Step 3	Click the **Create New** button.
Step 4	Enter a description of the department in the **Description** field.
Step 5	If this is the current department select the checkbox for **Default Option**, otherwise leave unchecked.
Step 6	Click the **Save** button.

Editing Departments

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Department** from the left-hand menu.
Step 3	Select the **Department** from the **List of Departments**.
Step 4	Click the **Edit** button.
Step 5	Edit the description of the department in the **Description** field.
Step 6	If this is the current department, select the checkbox for **Default Option**, otherwise leave unchecked.
Step 7	Click the **Save** button.

Deleting Departments

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Department** from the left-hand menu.
Step 3	Select the **Department** from the **List of Departments**.
Step 4	Click the **Delete** button.

Managing Locations
Locations are rooms and labs on campus available for hosting workshops (ex: Auditorium, CTE lab).

Creating Locations

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Location** from the left-hand menu.
Step 3	Click the **Create New** button.
Step 4	Enter the name of the location in the **Location Name** field.

Step 5	If you plan to add many workshops at this location, select the checkbox for **Default Option**, otherwise leave unchecked.
Step 6	Click the **Save** button.

Editing Locations

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Location** from the left-hand menu.
Step 3	Select the **Location** from the **List of Locations**.
Step 4	Click the **Create New** button.
Step 5	Edit the name of the location in the **Location Name** field.
Step 6	If you plan to add many workshops at this location, select the checkbox for **Default Option**, otherwise leave unchecked.
Step 7	Click the **Save** button.

Deleting Locations

Step 1	Click **CATALOGS** from the main menu.
Step 2	Select **Location** from the **left-hand menu**.
Step 3	Select the **Location** you want to delete from the **List of Locations**.
Step 4	Click the **Delete** button.

Managing Programs

A program is a group of workshops (ex: Tools Training, Social Media Seminar).

Creating Programs

Step 1	Click **CATALOGS** from the main menu.
Step 2	Click **Programs** from the left-hand menu.
Step 3	Click the **Create** button.
Step 4	Enter the name of the program in to the **Program Name**.
Step 5	Click the colored square to select a color.
	NOTE: This is the color that will appear in the calendar.
Step 6	Enter PDUs into the **PDU** field.
Step 7	Click the **Save** button.

Editing Programs

Step 1	Click **CATALOGS** from the main menu.
Step 2	Click **Programs** from the left-hand menu.
Step 3	Select the **Program** you want to edit.
Step 4	Click the **Edit** button.
Step 5	Enter the name of the program in to the **Program Name**.

Step 6	Click the colored square to select a color. **NOTE:** This is the color that will appear in the calendar.
Step 7	Enter the **PDU**.
Step 8	Click the **Save** button.

Deleting Programs

Step 1	Click **CATALOGS** from the main menu.
Step 2	Click **Programs** from the left-hand menu.
Step 3	Select the **Program** from the list.
Step 4	Click the **Save** button.

Saving Catalogs

Step 1	Click **CATALOGS** from the main menu.
Step 2	At the top of the list, click the **PDF** button to save as PDF or the **Excel** button to save as an Excel spreadsheet.
Step 3	Select the location on your computer to save the file.
Step 4	Click the **Save** button.

Printing Catalogs

Step 1	Click **CATALOGS** from the main menu.
Step 2	At the top of the list, click the **Print** button.
Step 3	Press the **Ctrl** and **P** keys on your keyboard at the same time (**Ctrl+P**) to open the print dialog on your computer.
Step 4	Click the **OK** button.
Step 5	Press the **ESC** key.

Managing Workshops

A workshop is an event within a program on a topic that faculty can register for and attend to earn PDU points. Workshops have a designated number of seats, if more people register than the available number of seats, excess participants can be placed on a waiting list. These participants will be informed by email if additional seats are made available. You can add prerequisites to a workshop that require the participant to attend previous workshops to register.

Creating New Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click on the **+** icon below **List of Workshops**.
Step 4	Enter the name of the topic in the **Topic Name** field.
Step 5	Select the name of the program from the **Program Name** drop-down menu.
Step 6	Enter the number of PDUs into the **PDU** field.
Step 7	To add prerequisites, click on the **+** icon.

Step 8	In the **Add Prerequisites** pop-up window, select the program name from the **Program Name** drop-down list.
Step 9	Select the check boxes for prerequisites to add.
	NOTE: You can remove prerequisites you have added to the workshop by clicking the **x** icon and unchecking the check boxes for the prerequisites you don't want.
Step 10	Click the **OK** button.
Step 11	Enter the description of the workshop in the **Description** field.
Step 12	Click the **Save** button.

Step 13	Click **Workshop Detail (Step – II)** tab from the top of the screen
Step 14	Click the **Create** button.
Step 15	Select the semester from the **Semester** drop-down menu.
Step 16	Select the location from the **Location** drop-down menu.
Step 17	Enter the number of seats available into the **Seating** field.
Step 18	Enter the URL to video in the **Video URL** field.
Step 19	Select the audience from the **Audience** drop-down menu.
Step 20	Enter the date on which you want to present in the **Topic Date** field.
Step 21	Enter the starting time of the workshop in the **Time Start** field.
Step 22	Enter the ending time of the workshop in the **Time End** field.
	NOTE: The **Duration** field will auto populate based on the values selected for start time and end time. This field may be edited if necessary.
Step 23	Select the presenter from the **Presenter** drop-down list.
Step 24	Click **Browse** to find the image of the Director's signature on your computer.
Step 25	Select the file and click **OK**.
Step 26	Click **Browse** to find the image of the Vice President's signature on your computer.
Step 27	Select the file and click **OK**.
Step 28	Click the **Save** button.
Step 29	Click the **Return to Events** button.

Editing Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshops**.
Step 3	Edit the name of the topic in the **Topic Name** field.
Step 4	Select the name of the program from the **Program Name** drop-down menu.
Step 5	Enter the number of PDUs into the **PDU** field.
Step 6	Add prerequisites using the **+** icon or remove them using the **x** icon.
Step 7	Edit the description of the workshop in the **Description** field.
Step 8	Click the **Save** button.

Step 9	Click **Workshop Detail (Step – II)** tab from the top of the screen
Step 10	Click the row with the workshop detail to edit.
Step 11	Click the **Edit** button.
Step 12	Select the semester from the **Semester** drop-down menu.
Step 13	Select the location from the **Location** drop-down menu.
Step 14	Edit the number of seats available into the **Seating** field.
Step 15	Edit the URL to video in the **Video URL** field.
Step 16	Select the audience from the **Audience** drop-down menu.
Step 17	Edit the date on which you want to present in the **Topic Date** field.
Step 18	Edit the starting time of the workshop in the **Time Start** field.
Step 19	Edit the ending time of the workshop in the **Time End** field. **NOTE:** The **Duration** field will auto populate based on the values selected for start time and end time. This field may be edited if necessary.
Step 20	Select the presenter from the **Presenter** drop-down list.
Step 21	Click **Browse** to find the image of the **Director's** signature on your computer.
Step 22	Select the file and click **OK**.
Step 23	Click **Browse** to find the image of the **Vice President's** signature on your computer.
Step 24	Select the file and click **OK**.
Step 25	Click the **Save** button.
Step 26	Click the **Return to Events** button.

Cancelling Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshops**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop you want to cancel.
Step 5	Click the **Cancel** button.
Step 6	Click **Yes** in the confirmation pop-up window.
Step 7	Select using **Decline with note** or **Decline without note** option. If you select 'Decline with note', include a reason in the **Reason** field.
Step 8	Click **OK** in the confirmation pop-up window

Approving Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshops**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Click the **Approve** button.
Step 5	Select using the **Approve with note** or **Approve without note** option. If you select 'Approve with note', enter a reason in the **Reason** field.
Step 6	Click the **Approve Note** button.

Uploading Files to Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshop**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop from the **List of Workshops**.
Step 5	Click the **Upload File** button.
Step 6	Click the **Browse** button.
Step 7	Select the file on your computer and click **OK**.
Step 8	Click the **Upload** button.
Step 9	Click the **OK** button in the prompt.

Viewing Workshop Files

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshop**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop from the **List of Workshops**.
Step 4	Click **View Files** button.
Step 5	Click the **Download** link for the files you want to view.
Step 6	Click the **Close** button.

Viewing History

History includes approval or disapproval notes.

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the workshop's **Edit** icon from the rightmost column of the **List of Workshop**.
Step 3	Click on the **Workshop Details (Step - II)** tab.
Step 4	Select the workshop from the **List of Workshops**.
Step 5	Click the **View History** button.
Step 6	Click the **Close** button.

Registering User for Topics

NOTE: You can use this feature to override pre-requisite conditions.

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the **User Registration** icon for the workshop in **List of Workshops**.
Step 3	Enter the user's first and last name into the **Search** field.
Step 4	Click the **Register** button. **NOTE:** If the user has not attended prerequisite topics, you will need to click **Yes** in the **Registration** pop-up window.
Step 5	Click the **OK** button in the confirmation window.

Creating a User to Register for Topics

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Click the **User Registration** icon for the workshop in **List of Workshops**.
Step 3	Type into the **Search** field.
Step 4	Click the **Create User** button.
Step 5	Enter the user's SPSU email address into the **User Name** field.
Step 6	Enter the user's first name into the **First Name** field.
Step 7	Enter the user's last name into the **Last Name** field.
Step 8	Select the user's department from the **Department** drop-down menu.
Step 9	Enter the user's phone number into the **Phone Number** field.
Step 10	Enter the user's alternate phone number into the **Alternate Phone Number** field.
Step 11	Click the **Save** button.
Step 12	The user appears as the **Selected User** below the search field. Click the **Register** button.
Step 13	Click **OK** in the confirmation message.

> **NOTE:** If there are prerequisite topics the user should have attended, you will need to click **Yes** in the **Registration** pop-up window.

Filtering Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	The Filter menu is at the left side of the screen. Enter your search terms into the field in the **Keyword** submenu.
Step 3	Select the checkboxes for the program or programs whose workshops you want to view in the **Program** submenu.
Step 4	Click the **Calendar** icon for the **Start Date** field in the **Dates** submenu.
Step 5	Choose the earliest calendar day of the workshops you want to view.
Step 6	Click the **Calendar** icon for the **End Date** field in the **Dates** submenu.
Step 7	Choose the latest calendar day of the workshops you want to view.

> **NOTE:** You can start your search over, or start a new search, at any time by clicking the **Clear Filter** button.

Sorting Workshops

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	Filter the workshops using the left-hand menu.
Step 3	Click on the column headers (ex: Class, Time, or Seats).
Step 4	The list sorts numerically, alphabetically, or earliest-first/latest first.

Saving Workshop Lists

Step 1	Click **WORKSHOPS** from the main menu.

Step 2	At the top of the list, click the **PDF** button to save as PDF or the **Excel** button to save as an Excel spreadsheet.
Step 3	Select the location on your computer to save the file.
Step 4	Click the **Save** button.

Printing Workshop Lists

Step 1	Click **WORKSHOPS** from the main menu.
Step 2	At the top of the list, click the **Print** button.
Step 3	Press the **Ctrl** and **P** keys on your keyboard at the same time (**Ctrl+P**) to open the print dialog on your computer.
Step 4	Click the **OK** button.
Step 5	Press the **ESC** key.

Managing Your Account

Account information includes your SPSU email address, name, phone number, role, user type, audit information, and password.

Updating Your User Profile

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Update My Account** from the left-hand menu.
Step 3	Edit the **User Name** field so that it is your SPSU email address.
Step 4	Edit the **First Name** field so that it is your first name.
Step 5	Edit the **Last Name** field so that it is your last name.
Step 6	Choose your correct department from the **Department** drop-down menu.
Step 7	Edit the **Phone Number** field so that it is your phone number.
Step 8	Edit the **Alternate Phone Number** field so that it is your alternate phone number.
Step 9	Check or uncheck the box for **Is Active** to reflect your status.
Step 10	Click **Save**. **NOTE:** After you click Save you will be signed out and prompted to log back in.

Updating Your User Role and User Type

> **NOTE:** Only Superadmin can change their role and manage Admin and Superadmin accounts. If you are Admin or Superadmin and choose a different role, you will be unable to restore your Admin or Superadmin status without the action of another Superadmin.

Step 1	Click **ADMIN** from the main menu.
Step 2	Open the **Roles and User Types** tab.
Step 3	Select the radio button for your desired **User Role**.
Step 4	Select the radio button for your desired **User Type**.

Step 5	Click **Save**.

Viewing Your Audit Info

Step 1	Click **ADMIN** from the main menu.
Step 2	Open the **Audit Info** tab.
Step 3	View the dates your account was created and last modified.
Step 4	Click the **Close** button.

Changing Your Password

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Change My Password** from the left-hand menu.
Step 3	Enter your current password into the **Current password** field.
Step 4	Enter your new password into the **New password** field.
Step 5	Enter your new password a second time into the **Confirm password** field.
Step 6	Click the **Change Password** button.

Managing User Accounts

As an Admin, you can view users, change user roles to Participant, Presenter, and Auditor, assign user types, and view audit information. Only the Superadmin can change user roles to Admin and Superadmin.

Search for a User

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Type your search terms in the **Search** field on the top right of the table of entries.
Step 4	When you stop typing, a processing message appears and your refined results appear automatically below.

Sorting Users

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click on the column headers (ex: User Name, Department Name).
Step 4	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Editing User Profiles

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **User Name** to select the row.
Step 4	Click the **Edit** button below the **List of Users**.

Step 5	Edit the **User Name** field so that it is the user's SPSU email address.
Step 6	Edit the **First Name** field so that it is the user's first name.
Step 7	Edit the **Last Name** field so that it is the user's last name.
Step 8	Choose the user's correct department from the **Department** drop-down menu.
Step 9	Edit the **Phone Number** field so that it is the user's phone number.
Step 10	Edit the **Alternate Phone Number** field so that it is the user's alternate phone number.
Step 11	Check or uncheck the box for **Is Active** to reflect the user's status.
Step 12	Click the **Save** button.

Editing Roles and User Types

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **User Name** to select the row.
Step 4	Click the **Edit** button below the **List of Users**.
Step 5	Open the **Roles and User Types** tab.
Step 6	Beneath **Select a Role**, select the radio button next to the appropriate role.
Step 7	Beneath **Select a User Type**, check the boxes next to the desired **User Types**.

> **NOTE:** If you are creating an Auditor account for a Dean who wants to audit multiple departments, hold down the CTRL key and select the desired departments from the **Select Departments** drop-down menu.

Step 8	Click the **Save** button.

Viewing Audit Info

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **User Name** to select the row.
Step 4	Click the **Edit** button below the **List of Users**.
Step 5	Open the **Audit Info** tab.
Step 6	View the dates the account was created and last modified.
Step 7	Click the **Close** button.

Inactivating Users

> **NOTE:** Inactive users cannot log in to the system.

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **User Name** to select the row.
Step 4	Click the **Inactive** button below the **List of Users**.
Step 5	Click the **Inactive** button in the confirmation message.

Creating New Users

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **Create** button below the **List of Users**.
Step 4	Enter the user's SPSU email address into the **User Name** field.
Step 5	Enter the user's first name into the **First Name** field.
Step 6	Edit the user's last name into the **Last Name** field.
Step 7	Choose the user's correct department from the **Department** drop-down menu.
Step 8	Edit the **Phone Number** field so that it is the user's phone number.
Step 9	Edit the **Alternate Phone Number** field so that it is the user's alternate phone number.
Step 10	Click the **Save** button.

Managing Other Workshops

Manage Other Workshops is an area where the administrator can add a record of workshops that exist outside the system. For instance, there are programs at SPSU outside the CTE Registration System where faculty earn PDUs, such as the Teaching Academy for Distance Learning. The admin can give credit for this SPSU sponsored workshop as an Internal Workshop. Another example, if a faculty member attends training at an outside university, the Admin or Superadmin can give them credit by adding an External Workshop. Once the administrator adds these other workshops, they appear in the User's transcript in Reports.

Adding Other Workshops for a User

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **User Name** to select the row.
Step 4	Click the **Manage Other Workshops** button below the **List of Users**.
Step 5	Click the **Create** button below the **List of Other Workshops**.
Step 6	Enter the name of the workshop into the **WorkshopName** field.
Step 7	Enter the name of the sponsor into the **Sponsor Name** field.
Step 8	Enter the name of the location into the **Location Name** field.
Step 9	Select 'Internal Workshop' or 'External Workshop' from the **Type** drop-down menu.
Step 10	Click the **Calendar** icon to choose the **Start Date** from the calendar.
Step 11	Click the **Calendar** icon to choose the **End Date** from the calendar.
Step 12	Enter the length in hours of the external workshop.
Step 13	Enter the **PDU** earned from the external workshop.
Step 14	Click the **Save** button.

Editing Other Workshops for a User

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.

Step 3	Click the **User Name** to select the row.
Step 4	Click the **Manage Other Workshops** button below the **List of Users**.
Step 5	Select the workshop you want to edit from the **List of Other Workshops**.
Step 6	Click the **Edit** button below the **List of Other Workshops**.
Step 7	Edit the name of the workshop into the **Workshop Name** field.
Step 8	Edit the name of the sponsor into the **Sponsor Name** field.
Step 9	Edit the name of the location into the **Location Name** field.
Step 10	Select 'Internal Workshop' or 'External Workshop' from the **Type** drop-down menu.
Step 11	Click the **Calendar** icon to choose the revised **Start Date** from the calendar.
Step 12	Click the **Calendar** icon to choose the revised **End Date** from the calendar.
Step 13	Enter the length in hours of the external workshop.
Step 14	Edit the **PDU** earned from the external workshop.
Step 15	Click the **Save** button.
Step 16	Click the **Return to Events** button.

Deleting Other Workshops for a User

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **Manage User Accounts** from the left-hand menu.
Step 3	Click the **User Name** to select the row.
Step 4	Click the **Manage Other Workshops** button below the **List of Users**.
Step 5	Select the external workshop you want to delete from the **List of Other Workshops**.
Step 6	Click the **Delete** button.

Managing User Events

You can register users for workshops, cancel their registration, mark users as attended, and upload documents for presenters.

Filtering User Events

Step 1	Click **ADMIN** from the main menu.
Step 2	Click on **Manage User Events** from the left-hand menu.
Step 3	Select the Program from the **Program** drop-down menu.
Step 4	Select the Topic from the **Topic** drop-down menu.
Step 5	Select 'All', 'Not attended', or 'Attended' from the **Attended** drop-down menu.
Step 6	Select 'All', 'Not in Waiting List', or 'In Waiting List' from the **Waiting List** drop-down menu.
Step 7	Select 'All', 'Cancelled', or 'Not Cancelled' from the **Cancelled** drop-down menu.

Including User in Topics

Step 1	Click **ADMIN** from the main menu.
Step 2	Click on **Manage User Events** from the left-hand menu.

Step 3	Select the checkboxes the users you want to remove from the waiting list.
Step 4	Click **Include User in Topic**.
Step 5	Click the **Yes** button in the confirmation message.

Cancelling User Registrations

Step 1	Click **ADMIN** from the main menu.
Step 2	Click on **Manage User Events** from the left-hand menu.
Step 3	Select the row of the user you want to mark as cancelled.
Step 4	Click **Cancel User Registration**.
Step 5	Click the **Yes** button in the confirmation message.

Marking Users as Attended

Step 1	Click **ADMIN** from the main menu.
Step 2	Click on **Manage User Events** from the left-hand menu.
Step 3	Select the row of the user you want to mark as attended.
Step 4	Click **Mark as Attended**.
Step 5	Click the **Yes** button in the confirmation message.

Sorting User Events

Step 1	Click **ADMIN** from the main menu.
Step 2	Click on **Manage User Events** from the left-hand menu.
Step 3	Click on the column headers (ex: Participant or Workshop Name).
Step 4	The list sorts numerically, alphabetically, or chronologically in ascending or descending order.

Managing News

News displays updates posted by the Superadmin or Admin. News consists of a Long Content field and Short Content field. It is best to limit your Long Content to 200 words or less, and your Short Content to 10 words or less.

Creating News

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **News** from the left-hand menu.
Step 3	Click the **Create New** button.
Step 4	Enter the date into the **News Date** field.
Step 5	Enter a headline into the **Title** field.
Step 6	Enter the content of your news item into the **News Long Content** field.
Step 7	Enter a small one sentence summary into the **News Short Content** field.
Step 8	Click the **Save** button.

Editing News

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **News** from the left-hand menu.
Step 3	Select the news that you want to edit.
Step 4	Click the **Edit** button.
Step 5	Make the desired changes to the headline and content fields.
Step 6	Click the **Save** button.

Deleting News

Step 1	Click **ADMIN** from the main menu.
Step 2	Select **News** from the left-hand menu.
Step 3	Select the news you want to delete.
Step 4	Click the **Delete** button.
Step 5	Click the **OK** button in the confirmation message.

Saving Admin Info

Step 1	Click **ADMIN** from the main menu.
Step 2	You can print **User Accounts**, **User Events**, and **News**. Choose which you want from the left-hand menu.
Step 3	At the top of the list, click the **PDF** button to save as PDF or the **Excel** button to save as an Excel spreadsheet.
Step 4	Select the location on your computer to save the file.
Step 5	Click the **Save** button.

Printing Admin Info

Step 1	Click **ADMIN** from the main menu.
Step 2	You can print **User Accounts**, **User Events**, and **News**. Choose which you want from the left-hand menu.
Step 3	At the top of the list, click the **Print** button.
Step 4	Press the **Ctrl** and **p** keys on your keyboard at the same time (**Ctrl+P**) to open the print dialog on your computer.
Step 5	Click the **OK** button.
Step 6	Press the **ESC** key.

Managing Reports

There are six kinds of reports available to the Admin/Superadmin role:

- *Registration* reports include information on who is registered for which workshops.
- *Evidentiary* reports are proof that you attended the workshop which can be used for evaluation and promotion.
- *Certificates of Completion* are standard certificates with your name, the title of the workshop and program, hours and PDUs earned, and signed off with director signature.
- *Sign In* sheets include information about which registered users attended and did not attend your workshops.

- *Transcripts* include user name, workshop name, date of completion, hours and number of PDUs.
- *Show/No-show* reports include information about which registered participants appeared and did not appear at the workshop.

Viewing Registration Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Registrations** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **PDF** button.

Viewing Sign In Sheets

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Sign In Sheet** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **PDF** button.

Viewing Transcripts

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Transcripts** from the left-hand menu.
Step 3	Select the user from the **User** drop-down list.
Step 4	Click the **Show Report** button.
Step 5	Click the **PDF** button.

Viewing Evidentiary Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Evidentiary** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click the **Evidentiary Report** button.

Viewing Certificates

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Certificate** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.

Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Click the **Show Report** button.
Step 6	Click on **Certificate** button.

Viewing Show/No-show Reports

Step 1	Click **REPORTS** from the main menu.
Step 2	Select **Show-No-Show to Event** from the left-hand menu.
Step 3	Select the program from the **Program Name** drop-down list.
Step 4	Select workshop from the **Workshop Name** drop-down list.
Step 5	Select the department from the **Department** drop-down list.
Step 6	Select the radio button for attended or not attended.
Step 7	Click the **Show Report** button.

Managing Email Templates

This tool allows you to customize the default messages emailed to users when common events occur, including:

- A workshop a participant registered from is two business days away.
- A workshop a presenter is registered to give is two business days away.
- A workshop a presenter submitted for approval has been approved.
- A workshop a presenter created has been cancelled.
- A participant successfully registered.

Step 1	Click **ADMIN** from the main menu.
Step 2	Choose the **Email Template** you want to edit.
Step 3	Edit the subject in the **EmailSubject** field.
Step 4	Edit the body in the **EmailBody** field.
Step 5	Click the **Save** button.
Step 6	Click the **OK** button in the confirmation message.

Using Replacement Strings

The following strings allow the system to provide individualized information in the email, such as the user's name or the date of the workshop:

Information	Replacement String
Workshop Name	##WorkshopName##
Event Name	##EventName##
Event Date	##EventDate##
Time Start	##TimeStart##
Time End	##TimeEnd##
Location	##Location##
Presenter Name	##PresenterName##

Using the Email Toolbar

The Email Template tool is powered by TinyMCE WYSIWYG editor. You can edit content similar to other word processing tools.

The first row of icons contains the usual save and formatting options, from left to right:

Option	Action
Save	Saves the template.
New Document	Clears the template.
Bold	Bolds the selected text.
Italics	Italicizes the selected text.
Strikeout	Strikesout the selected text.
Left Align	Aligns the selected text to the left.
Center Align	Aligns the selected text to the center.
Right Align	Aligns the selected text to the right.
Justify	Jusifies the selected text to align both right and left.
Styles	Does not seem to do anything.
Format	A menu of headings and styles to apply to your text.
Font Family	Applies the font family to the selected text.
Font Size	Applies the font size to the selected text.

The second row of icons contains tools, from left to right:

Option	Action
Cut	Deletes the selected text and puts it on the clipboard to be pasted.
Paste	Pastes text in the clipboard that was cut or copied.
Paste Text	Pastes text in the clipboard that was cut or copied as plaintext.
Paste Word	Pastes text in the clipboard that was cut or copied with Word formatting.
Find	Search for a term in the text.
Find/Replace	Search for a term in the text and replace it with something else.
Bulleted List	Create a list whose items are preceded by bullets.
Numbered List	Create a list whose items are preceded by ordered numbers.
Left Indent	Create an indent on the left side.
Right Indent	Create an indent on the right side.
Quotation	Create a block quote.
Undo	Undo previous action.
Redo	Redo an action undone.
Link	Create a hyperlink to a URL in the text.
Unlink	Remove a hyperlink fro the text.
Insert/Edit Anchor	Create a location in the text that can be accessed via a hyperlink.
Insert Picture	Insert an image into the text.
Help	View information about the editor.
Insert Date	Insert current date.

Insert Time	Insert current time.
Preview	Preview formatting as it will be viewed in the email.
Text Background Color	Color lines of the document containing text.
Text Highlighter	Create a block of color around characters of text.

The third row of icons contains tools, from left to right:

Option	**Action**
Insert/Edit Table	Create a table of specified columns and width.
Table Row Properties	Apply properties to the table rows.
Table Cell Properties	Apply properties to the table cells.
Insert Row Before	Insert row before the row selected.
Insert Row After	Insert row after the row selected.
Delete Row	Delete the row selected.
Insert Column Before	Insert column before the column selected.
Insert Column After	Insert column after the column selected.
Delete Column	Delete the column selected.
Split Merged Table Cells	Split a table cell into multiple cells.
Merge Table Cells	Make multiple table cells into one.
Insert Horizontal Line	Insert a 1 px black horizontal line.
Clear Formatting	Clear any formatting applied to the selected text.
Show/Hide Invisible Elements	Show invisible elements such as paragraph markers.
Subscript	Format the selected text as a subscript.
Superscript	Format the selected text as a superscript.
Insert Special Character	Select a special character such as a degree sign or copyright symbol from the menu.
Emoticons	Select an emoticon (smiley face and variants) from the menu.
Insert/Edit Embedded Media	Insert media such as a video or ppt presentation into the text.
Insert Horizontal Line (Custom)	Insert a horizontal line of custom thickness and color.
Print	Print the text.
Direction Left to Right	Text displays left to right.
Direction Right to Left	Text displays right to left.
Toggle Full Screen Mode	View the text editor full screen. Press ESC to return.

The fourth row of icons contains tools, from left to right:

Option	**Action**
Insert New Layer	Create a new layer.
Move Forward	Move forward through the layers.
Move Backward	Move backward through the layers.

Toggle Absolute Positioning	Used for documents with layers.
Edit CSS Style	Create a new CSS style.
Citation	Create a citation element.
Abbreviation	Create an abbreviation element.
Acronym	Create an acronym element.
Deletion	Create a deletion element.
Insertion	Create an insertion element.
Show/Hide Visual Control Characters	Used for documents with visual control characters.
Insert Nonbreaking Space Character	Create one nonbreaking space character (nbsp;).
Insert Predefined Template Content	Does not do anything.
Insert Page Break for Printing	Content after insertion point will print on a new page.
Restore autosaved Content	Restore content to previous save.

Using the Calendar

The calendar is visible both when logged out and logged in. Logging in gives you the option of registering and cancelling registration directly from the calendar. You also have the option to export events you are registered for to your Google or Outlook calendar.

Viewing the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Choose to view the calendar by month, week, or day by clicking the **month**, **week**, or **day** button on the top right of the calendar.
Step 4	Click the left and right arrows below the drop-down menu to move backwards and forwards through the month, week, or day.

Registering from the Calendar

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the color coded event you want to register for.
Step 3	Click the **Register** link.
Step 4	Click the **OK** button in the confirmation message.

Exporting Calendar Events

NOTE: You must be registered for an event before you have the option to export it to your calendar.

Exporting to Google Mail

Step 1	Click **Calendar** from the main menu.
Step 2	Click on the desired event from the calendar.
Step 3	Click the **Export to Google Calendar** link.
Step 4	Enter your email address into the **Email** field.
Step 5	Enter your password into the **Password** field.
Step 6	Click the **Export** button.
Step 7	The appointment appears in your Google calendar.

Exporting to Outlook

Step 1	Click **Calendar** from the main menu.
Step 2	Select whether you want to view all, registered for, or not registered for events in the calendar from top left drop-down menu.
Step 3	Click the **Export to Outlook** link.
Step 4	You will be prompted to open or save the file. Choose the radio button for **Save**.
Step 5	Choose the desired location on your computer and click **OK**.
Step 6	Use Outlook to import the .ics file.