CMS Documentation

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Document Summary

The document is a comprehensive manual for our Customer Management System (Skillsource CRM), detailing functionalities, user roles, and procedures for managing various aspects of the system. **It is recommended that you NOT print this document. It is best studied in its google doc form because you can use keyboard shortcuts to enlarge the screen (ctrl +) or diminish the screen (ctrl -) as needed for viewing the screen shots.** Here's a summarized breakdown of its key contents:

Key Features and Functionalities:

1. Login and User Management: Instructions on secure login practices, user logout reminders, and management of user roles, such as creating and deactivating staff user accounts.
2. Participant Management:
    - Searching and managing participant records including using advanced search features to prevent duplicate entries.
    - Detailed guidance on adding and editing various participant-related data like attendance, casenotes, and enrollments.
3. Workshop and Job Management:
    - Steps for creating and managing workshops including duplication features for repeated events.
    - Guidance on managing job openings, including adding new jobs and handling business branches.
4. Business and Contract Management:
    - Procedures for adding new businesses and branches, managing contracts, including creating, editing, and printing contracts using a wizard interface.
5. Reporting:
    - Various reports such as attendance, job openings, upcoming workshops, and detailed participant reports are discussed with instructions on generating and customizing these reports.
6. Technical Support and Troubleshooting:
    - Tips for handling common issues such as unsaved data and sorting data grids. Everything in this section is from support calls I have received from users.
    - Guidance on using pivot tables to enhance report functionalities.

System Integration and APIs:

- The document describes integration with Google Docs, ONET, and Abila MIP accounting, highlighting the system's capability to work seamlessly with external applications via APIs.

Security and Data Integrity:

- Emphasis on secure practices such as automatic logout after inactivity and thorough checks to prevent duplicate participant records.

User Roles and Responsibilities:

- Detailed descriptions of various user roles from administrative to functional levels like CMSADMIN, TEACHER, and STAFF, outlining their access levels and system capabilities.

Usage and Maintenance:

- Instructions on regular maintenance tasks like contract template editing and the importance of precise and clear communication when reporting issues.

The document serves as a full manual intended to guide users through all functionalities of the CMS, ensuring they can effectively manage data, fulfill operational needs, and maintain system integrity.

What is CMS?

Many years before “CMS” became an acronym for “**Content** Management System” in the late 1990s, the Skillsource CMS stood for “**Customer** Management System.” If we had a crystal ball back then we would have used **CRM** for Customer Relationship Management because that’s what CMS has always been. This CMS has always been our CRM. CRM systems are specifically designed to manage **customer data**, **interactions**, and **business processes** related to customer relationships, which could be what some might refer to informally as a "Customer Management System." So when people ask what this CMS is, it is most descriptive and accurate to say “It is our in-house CRM.”

Using a system that holds **Personally Identifiable Information (PII)** requires a high level of sensitivity and diligence, as improper handling of such data can lead to significant privacy violations, legal consequences, and harm to individuals. PII includes data like names, addresses, social security numbers, and other identifying details that can be exploited if exposed to unauthorized parties. Mishandling PII not only risks the trust of users but also exposes systems to potential data breaches and penalties. You may be asked to sign an NDA similar to the following: NON-DISCLOSURE AGREEMENT (NDA)

Throughout the life of this system the developers have tried not to duplicate the functionality of whatever state MIS was required. And where possible, they have endeavored to integrate with these systems to minimize duplicate entry. In the 30 year life of CMS, many required state systems have come and gone. Currently we are waiting for the next system to be launched and hoping they will build it with published API’s so that our CMS can have real-time integration with it. CMS currently integrates, via published API’s, with Google Docs, Google Calendar, Gmail, ONET and Abila MIP accounting.

We are hoping the new State system, based on SalesForce LaunchPad, will be capable enough to allow all initial data entry to be done in LaunchPad and then via published API’s, CMS will retrieve data as needed to avoid duplicate entry. See the next section for more information about LaunchPad.

What is LaunchPad?

It appears at this point that the next State required system is a Salesforce application called LaunchPad. LaunchPad for WIOA (Workforce Innovation and Opportunity Act) is a specialized version of Salesforce LaunchPad designed to help organizations comply with and manage the requirements of the WIOA program. If CMS and LaunchPad co-exist for some period of time, the application of first data entry will probably be LaunchPad. If the State permits, CMS can read data from LaunchPad using API's that LaunchPad provides so as to prevent duplicate data entry. If the State does not permit, then we will be forced to use less elegant ways to integrate the two systems.

Key features of LaunchPad for WIOA include:

1. Case Management

- **Client Tracking**: It allows workforce development agencies to track individuals enrolled in WIOA programs, recording their progress from intake through to employment or training outcomes.
- **Service Plans**: Users can create and manage individualized service plans, detailing the support services offered, the training provided, and any job placement activities.

2. Compliance and Reporting

- **Data Collection**: LaunchPad for WIOA helps agencies collect the necessary data for WIOA compliance, such as participant demographics, services received, outcomes, and performance metrics.
- **Performance Reporting**: The system generates reports required for federal and state-level compliance, including tracking key WIOA performance indicators like employment retention, earnings, and credential attainment.

3. Participant Engagement

- **Intake and Enrollment**: The platform offers tools for streamlined intake and enrollment processes, making it easier to capture participant information and assign them to the appropriate WIOA programs or services.
- **Self-Service Portals**: Some versions of LaunchPad for WIOA provide a self-service portal where participants can update their information, view available services, and track their progress in the program.

4. Employer and Job Placement Integration

- **Job Matching**: Agencies can connect job seekers with employers, track job placement efforts, and record job outcomes, ensuring that participants find meaningful employment.
- **Employer Engagement**: LaunchPad for WIOA includes tools for managing employer relationships, facilitating job fairs, and coordinating outreach to potential hiring companies.

5. Training and Support Services Management

- **Training Program Tracking**: The system helps manage participant enrollment in training programs, track progress through certifications, and monitor outcomes.
- **Support Services**: It supports the management of additional services such as transportation assistance, childcare, and other wrap-around services essential for WIOA participants.

6. Customizable Workflows

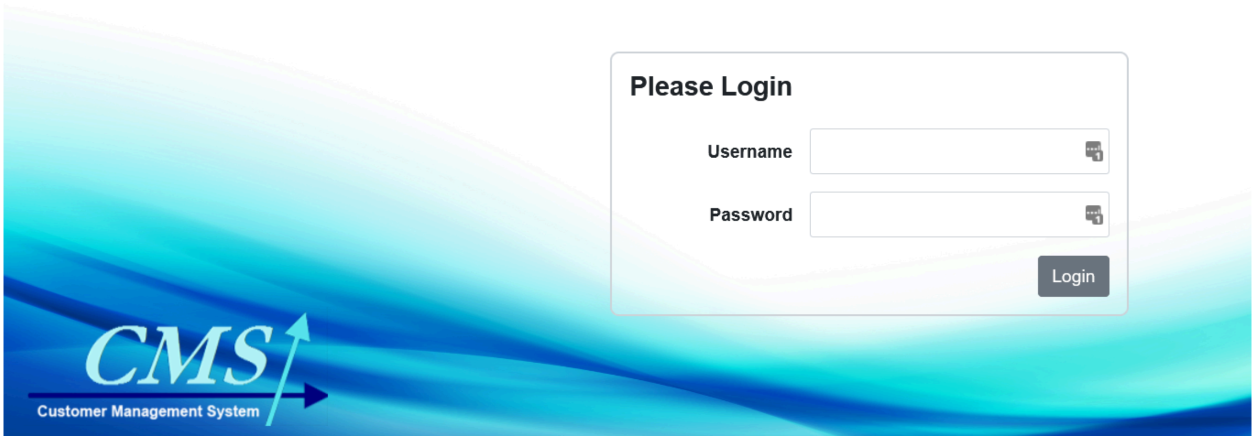
- **Tailored Processes**: Agencies can customize workflows to match the unique needs of their local workforce development programs, allowing flexibility in how WIOA services are delivered and tracked.
- **Automated Notifications**: Alerts and reminders for case managers help ensure participants stay on track with their service plans, training, and job search activities.

7. Collaboration and Coordination

- **Partner Agency Collaboration**: LaunchPad for WIOA allows workforce agencies to collaborate with partner organizations, such as training providers, employers, and other social services, ensuring a comprehensive support network for participants.

LaunchPad for WIOA ensures that workforce development organizations can efficiently manage participants, track outcomes, and meet the reporting requirements of the WIOA legislation. By offering an integrated solution for data management and compliance, it helps these organizations deliver better services and improve job placement outcomes for participants.

Login Screen



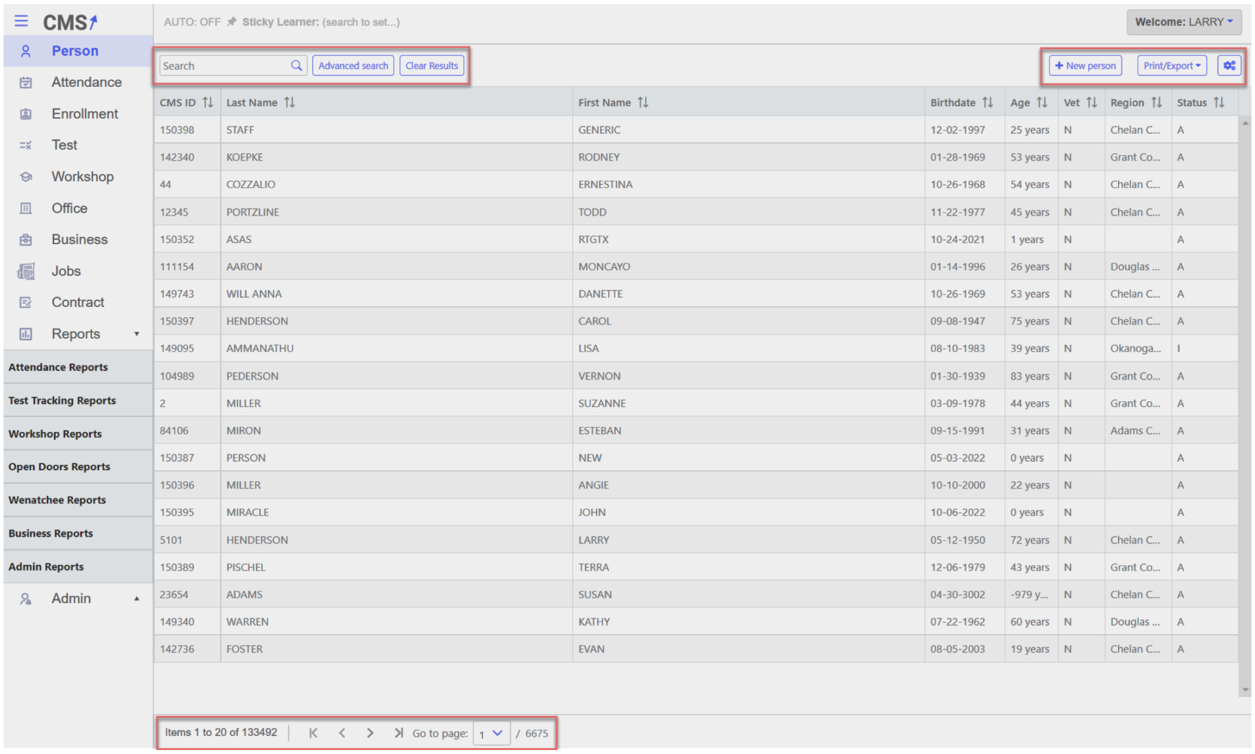
The login is required in order to protect the personal information that CMS captures. The login screen has been optimized for mobile phones making it possible to access CMS on small screen devices. However, be aware that most of the CMS screens are not yet optimized for small devices.

Please get into the habit of logging out whenever you leave your computer unattended. To make sure that unattended workstations never stay connected to the database, the system will automatically log you out after 15 minutes of inactivity. Inactivity means no keyboard or mouse movement for that time period.

This document is best viewed and read on-line as a google document. ***The screenshots are too small to be read when printed***, but as an online document you can zoom in and out of the screens as needed. Press **Ctrl +** to enlarge and **Ctrl -** to make it smaller. Do this now so you can see how it works.

Person Search

The List Person Data Grid



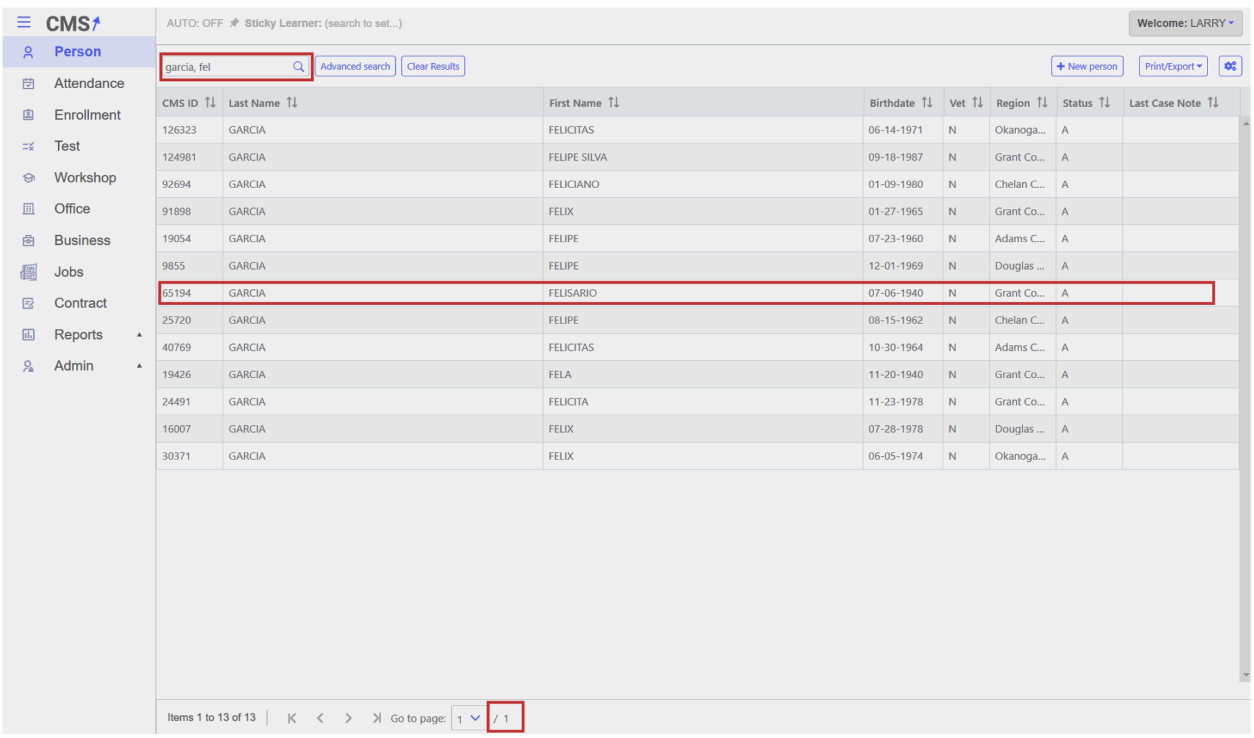
You can type in the **Search** box a **cmsID** or a **"last name"** or a **"last name, first name"**. Entering a cmsID should bring up a single record if such a record exists. Entering part of a name will bring up multiple records. *The best way to find a person if you only know their name is by typing the **last name, [comma], [space]** and the **first letter** of the first name.* **Double Click** on the desired row to bring up the Person profile tabs.

Why is it important to know how to look up a person in CMS?

Every month duplicate records are created due to insufficient care taken in finding existing records. The BEST first thing to do is click on **Advanced Search** and enter the birth date or SSN. If you do not have that information then the next BEST method is to type:

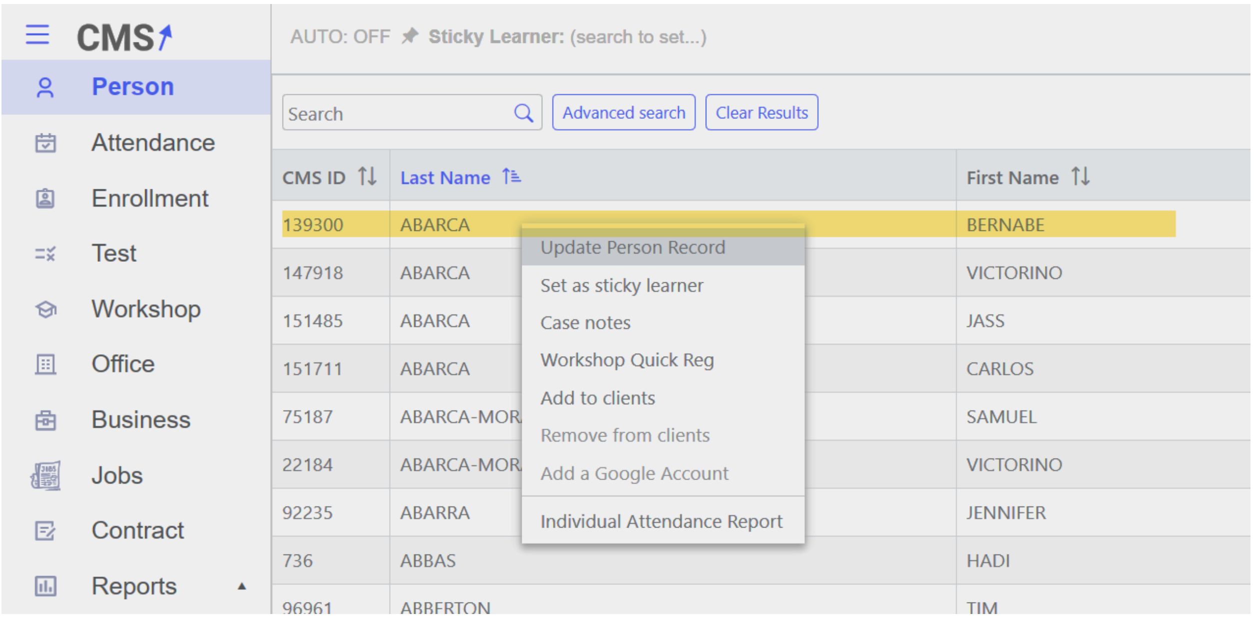
> **last name [comma] [space] first initial of the first name in the search field:**
> Garcia, F

Garcia, F because I am trying to find **Felisario Garcia** and I will keep adding letters of the first name until I only have **one** page of results (20 records or less). In this case I had to add ”**e**” and “**l**” to the “**F**” to get the following results:



Do the very best job you can searching for an existing record BEFORE adding a new one. If you should find what appears to be a duplicate record, notify the database administrator as soon as possible so the duplicate(s) can be removed. In database terms, a Person record is a Parent record just waiting for Child records to be added. For example, a Casenote record is a child record to a Person record. If there is more than one record and users are not aware of it, some users may add a Casenote to one record and another user may add a Casenote to the duplicate record. Which Person record is the correct one? Over time an enormous amount of bad data can be entered into the system just from the existence of duplicate records. This is also true of duplicate Business records.

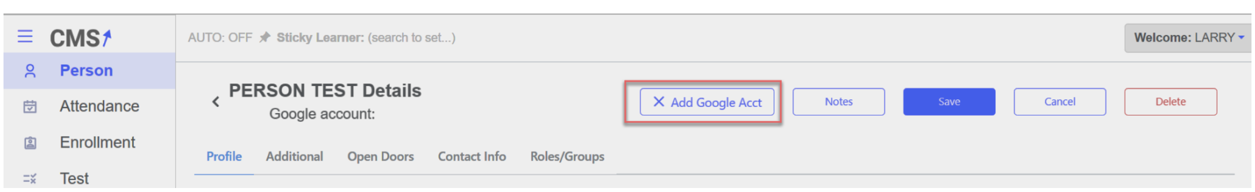
A **Right Click** will bring up a context menu with other options as you can see below:



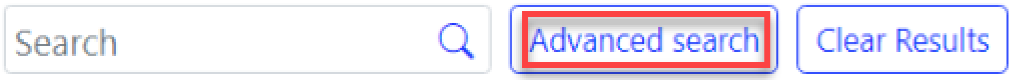
Right-Click Menu Options: The **Update Person Record** opens the complete multi-tab Person Profile (same as double-clicking on a row). **Set as sticky learner** is used when you want the system to remember a specific person (learner) as you move around the other screens. If Sticky Learner is set, the *Enrollment* and *Test* areas will automatically display records associated with that learner. **Case Notes** enables you to enter dated notes on your participants. There is also a button called "**Notes**" in the header of Profile screen. **Workshop Quick Reg** provides a very quick way to register a person in a workshop IF you know the Workshop number. **Add to Clients** and **Remove from Clients** gives trainers and teachers a way to manage their current people (more on this when we cover the advanced filter options). If an option is grayed-out it means that it is not a valid option.

The **Individual Attendance Report** will prompt for a date range and produce a learning center attendance report for the selected person.

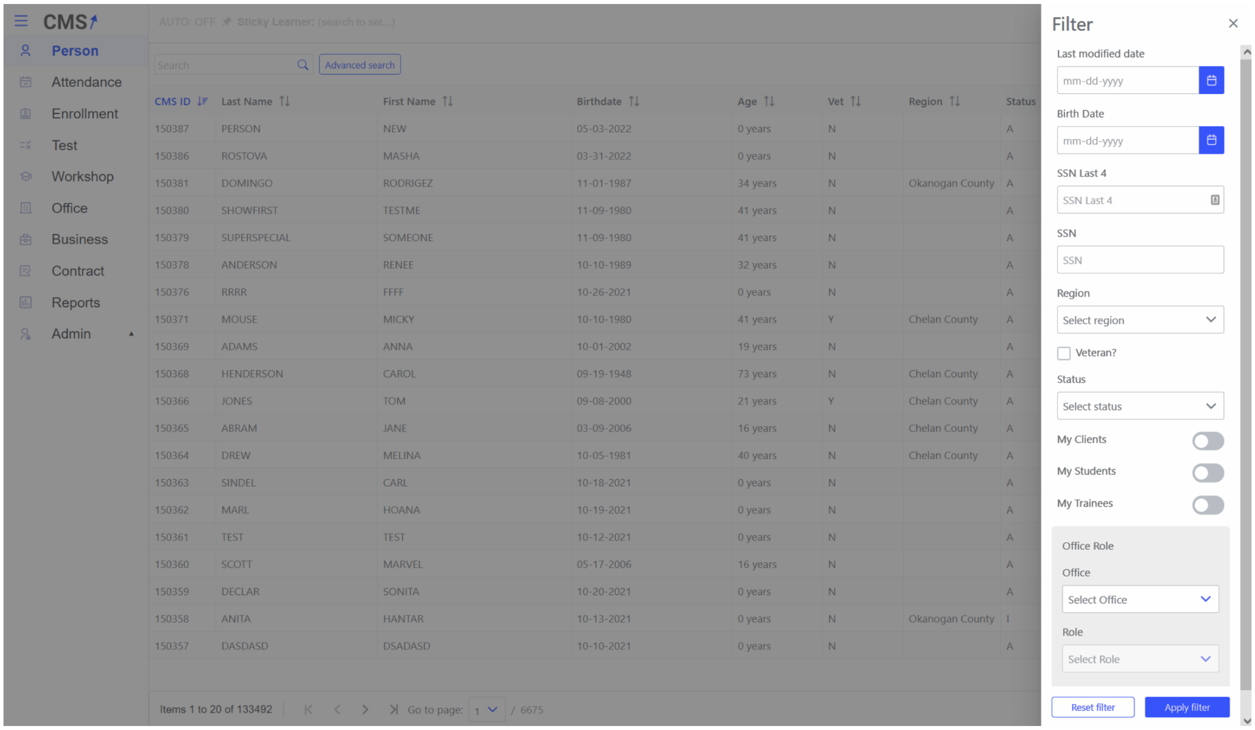
If the person does not yet have a Skillsource gmail account, the **Add a Google Account** option is an automated way to create that account.



If a Google account has been added, the actual account will be displayed under the person's name and the "**Add Google Acct**" button will not be shown.

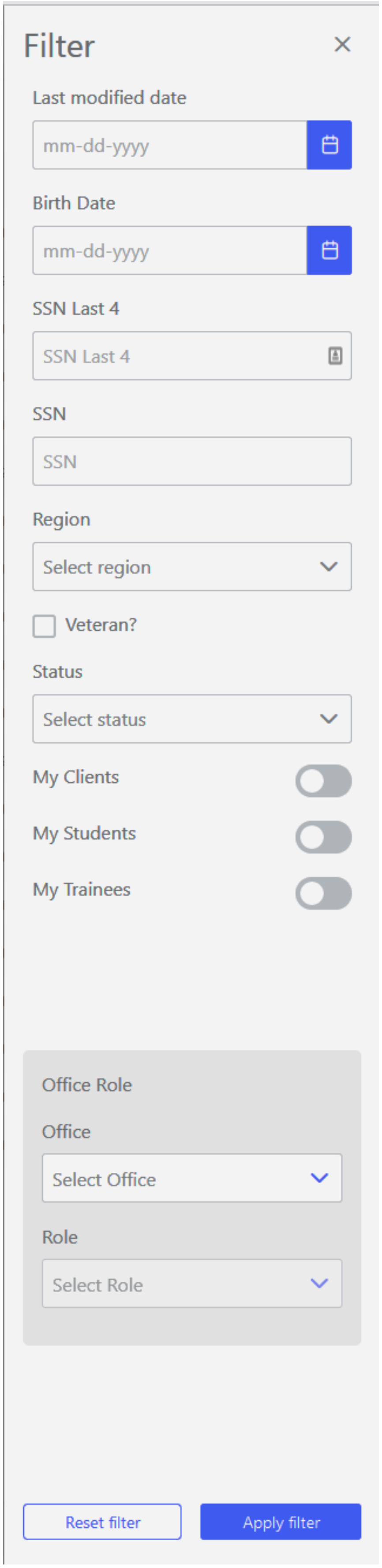


By clicking “Advanced Search” button the Filter panel presents useful selection criteria options:



The following page shows an expanded view of the **Filter** panel. Please take a moment to study the “Advanced Search” Filter options on the following page.

The “Advanced Search” provides a way to enter multiple search criteria that will be applied together when the user clicks the blue “Apply Filter” button. There is a logical **AND** operation being applied: Pull up all the records where this is true **AND** that is true **AND** that is true.

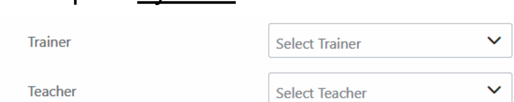


You do not have to use “Advanced Search” to find a record.

Notes on Filter (Advanced Search) Options:
Last modified date: This is useful for getting a list of Person records that have been recently created or edited.
Birth Date: This is the best way to look up a record when you have the person on the phone or at the reception desk. You will get a fairly small number of records that you can easily pick from. ***This presumes that a birth date has been entered on every person needing to be found in this way***.
SSN Last 4: This is another easy way to look up a record when you have the person there or on the phone.

General observations: This is called an Advanced Search tool because you can select multiple search criteria. Most of these are self explanatory, but the following need some explanation:

My Clients: You can right click on a Person record in the main list and select *add to Clients* OR *remove from Clients* to easily create and maintain a list of just your clients.
My Students: In the Additional Information tab of the Person profile there is the option to associate a staff person with a participant by Role

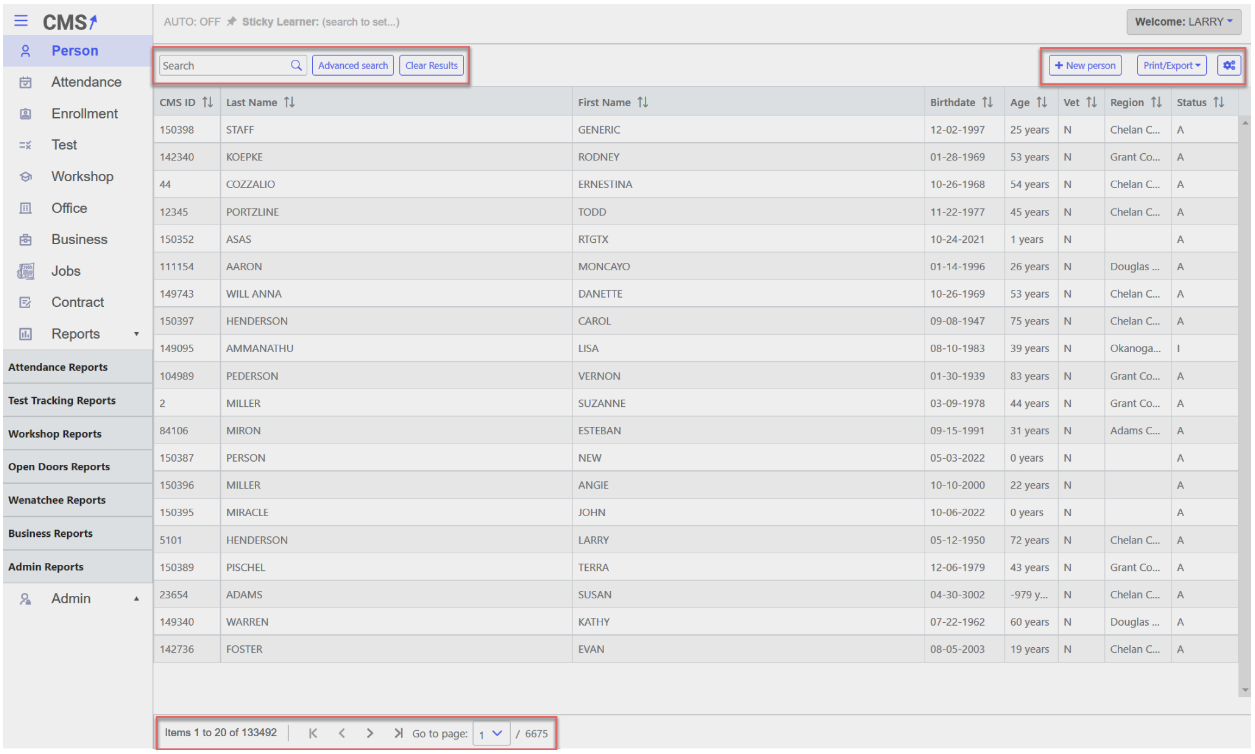


So if you are a person’s Trainer then that person will be included in the list of **My Trainees**. Likewise, if you are a person’s primary Teacher (in the learning center) then that person will be included in the list of **My Students**.

Searching by **Office and Role** is useful for maintaining staff roles, which controls access and functionality.

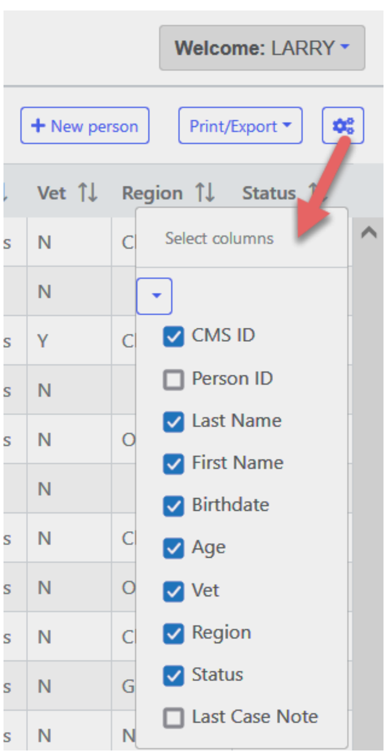
Apply filter: Click this button after you have made all your selections. Click the **Reset filter** button when you want to clear all your selections.

Opening Screen



Note the red box around the Page controls just above. At the time of this documentation there were 133,492 person records. These records are grouped in 6,675 pages of 20 records each. The page controls **|> < > >|** should be self explanatory:

- |> first page.
- < previous page.
- > next page
- >| last page.



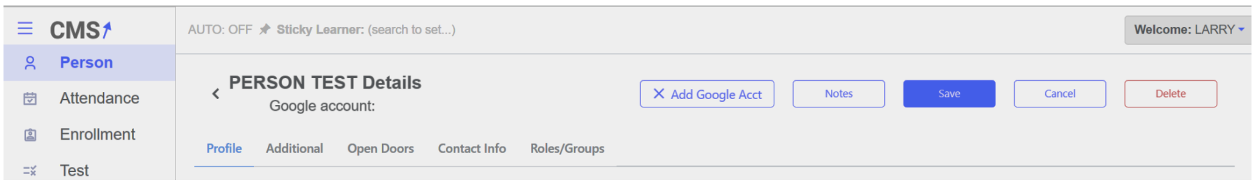
Select Columns Tool

This functionality is available in all the basic data grids and can be very helpful in limiting or expanding the number of columns being displayed. Or if you are not seeing a column that you need, check the “Select Columns” tool to see if it is available.

Also notice the up/down arrows to the right of each column name. This means you can sort the list by clicking on the column header. It is a toggle, so clicking once will sort one way and clicking again will sort the opposite way.

When you double click on a Person record(row) you will see the **Details** screen. These details are grouped under five tabs:

Profile, **Additional**, **Open Doors**, **Contact Info** and **Roles/Groups**:

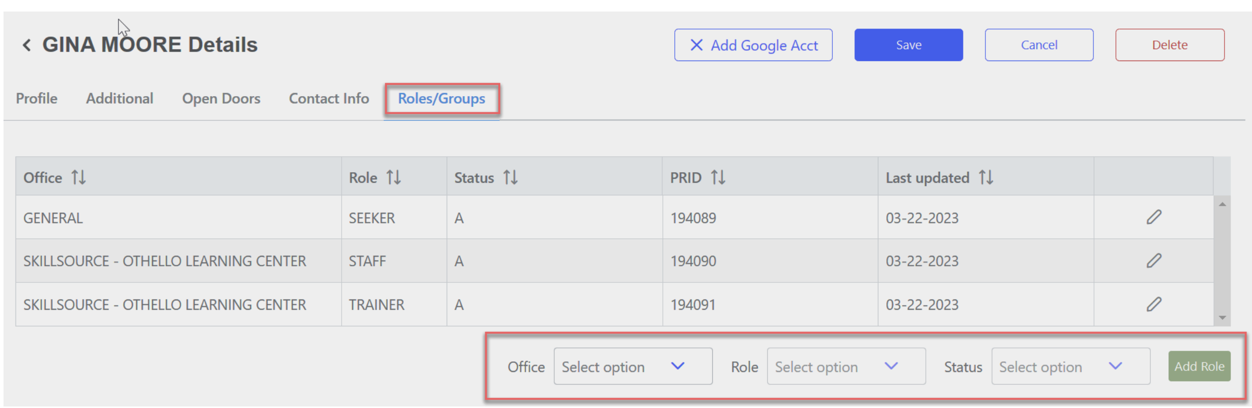


These five tabs manage lots of data and the most important thing to remember is that a change on any tab will **NOT** be saved until you click the blue **Save** button above. This is the only screen that works this way. The **Roles/Groups** tab has some additional edit/save functionality that is important to be aware of.

Again, if you make changes on any of the tabs and are called away from your computer for some emergency, your **changes will not be saved** when an "inactivity" logout occurs. For this reason, it is a good habit to frequently click the save button for good measure.

Assigning Roles

In CMS roles are primarily used to control access to administrative functionality.

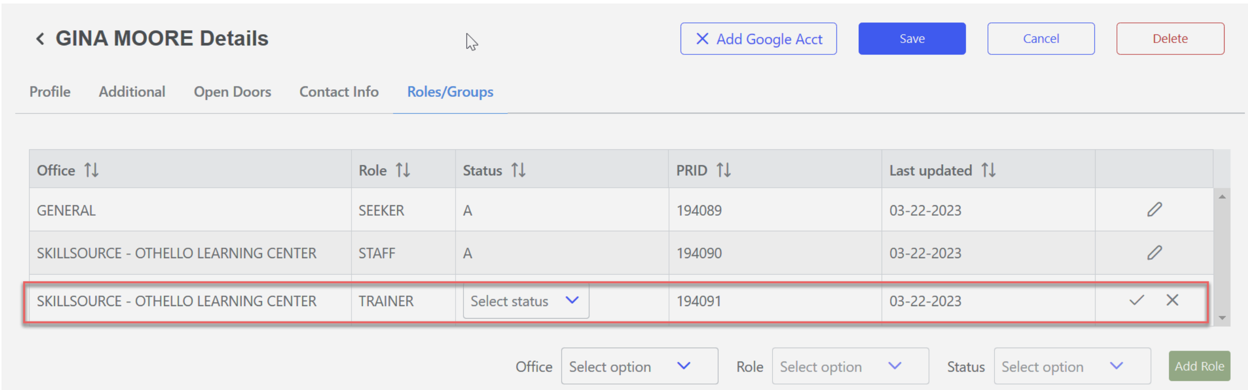


The process for creating a new Role is as follows:

1. Select the Office from the **Office** dropdown
2. Select the Role from the **Role** dropdown. (Note: A user is not allowed to have a "Staff" role in more than one office, If the user needs this kind of access, then add a "XStaff" role for each of those additional offices)
3. Select the Status from the **Status** dropdown. (Note: the "Deleted" status simply marks the role for deletion. It does not actually delete the role from the database)
4. Then click the green **Add Role** button.

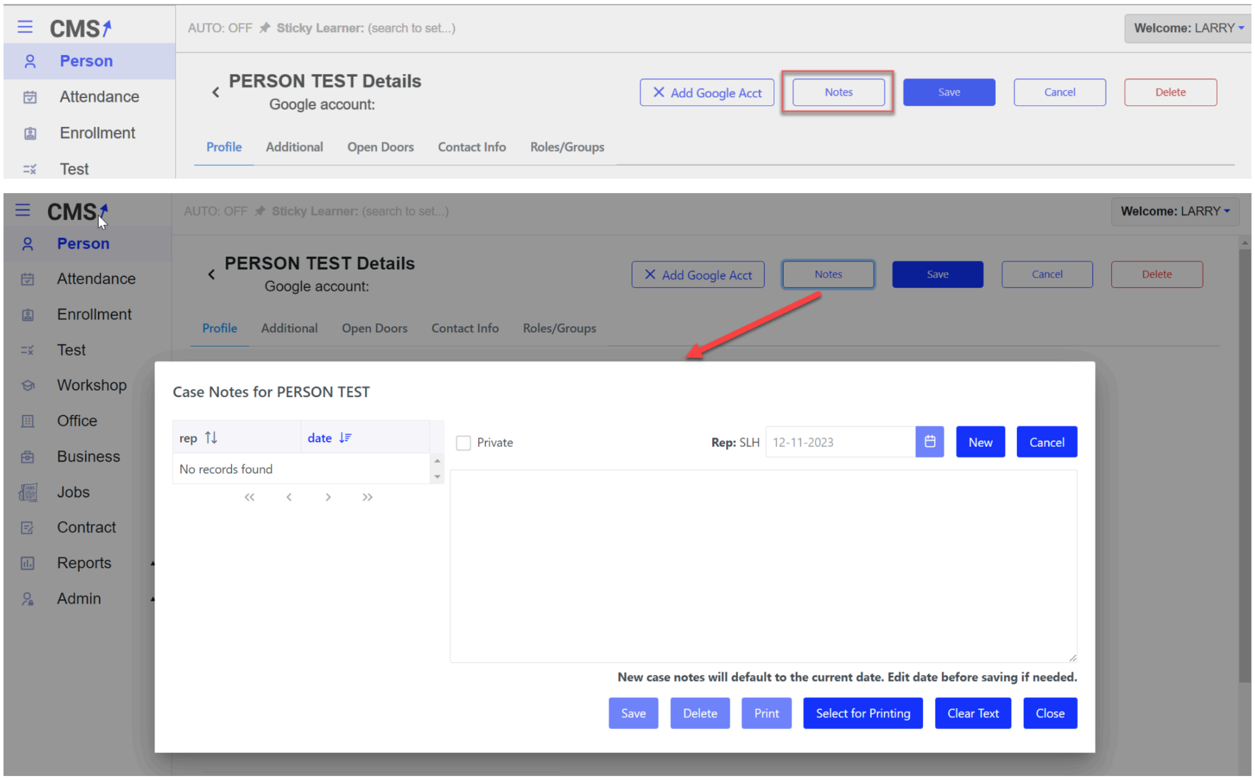
5. **Note**: The new role will not be added to the database until the blue **Save** button is clicked.

If you need to modify the status of an existing role, click on the little edit icon in the rightmost column. When you click it the UI will change as indicated below by the red outline.



Use the **Select Status** dropdown to select the new status and then click the check mark to register the change. But keep in mind that the database will not be changed until the blue **Save** button is clicked above.

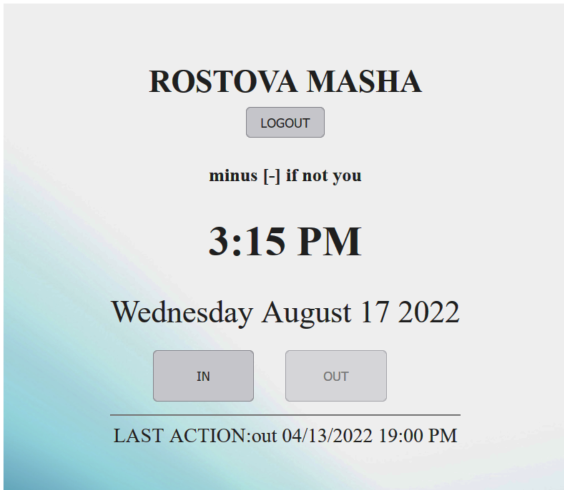
Casenotes



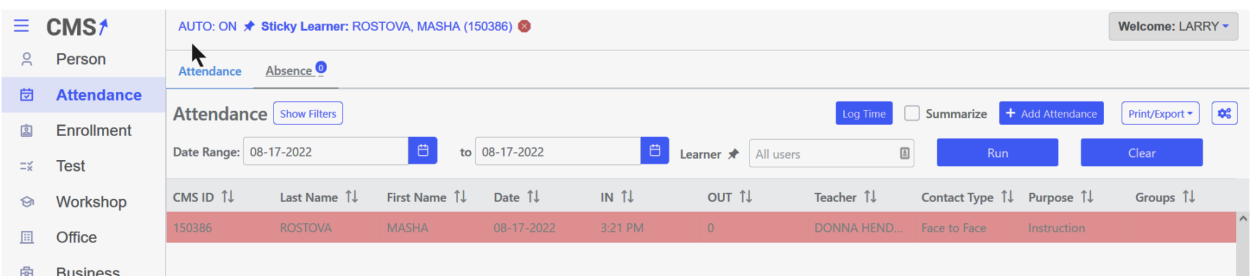
The panel on the left lists all the case notes that have been added to this person record. If you want to add a new note, click the **New** button that you see on the top right. You will be able to confirm the date (defaults to the current date) which you can edit as needed. Then just type in your note in the Textarea provided. When finished click the **Save** button.

Attendance

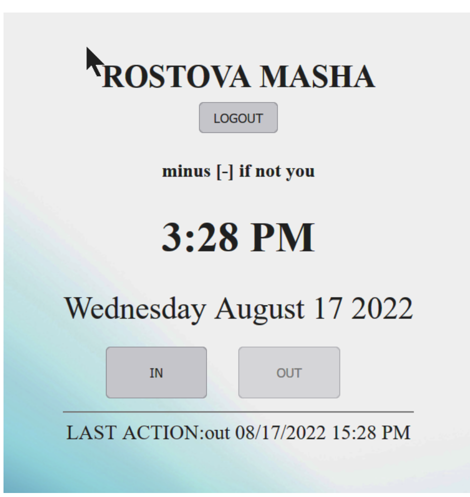
Student Clock-In Screen



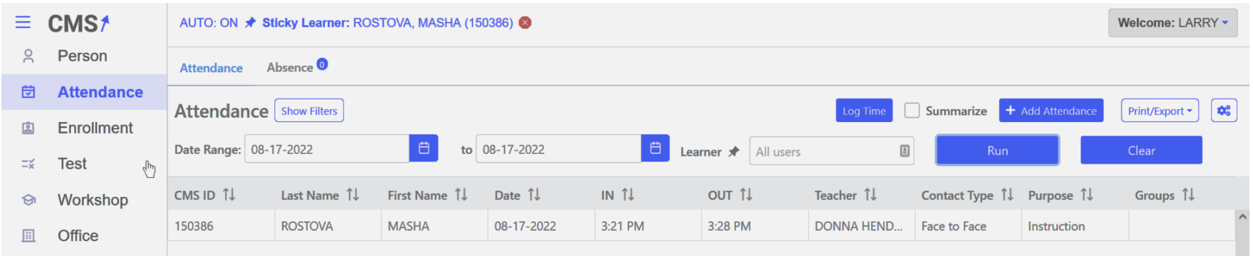
Rostova has entered her CMS id number logging into the ClockIn/Out screen. When she clicks the IN button, an attendance record is created as shown below. It is highlighted in red because it is an “Open” record, meaning that there has yet to occur a Logout event.



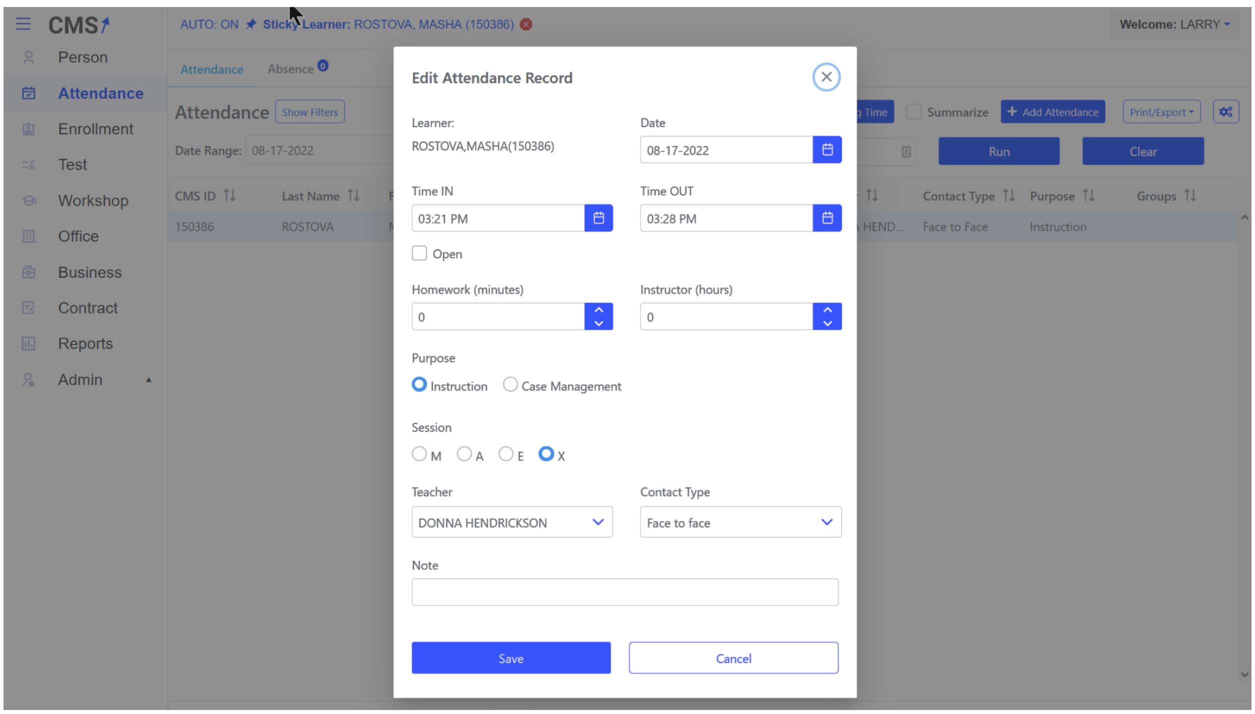
Rostova is now clocking out



Notice now the record is not highlighted in red and we see that there is an Out time recorded. This is called a “Closed” or completed attendance record.



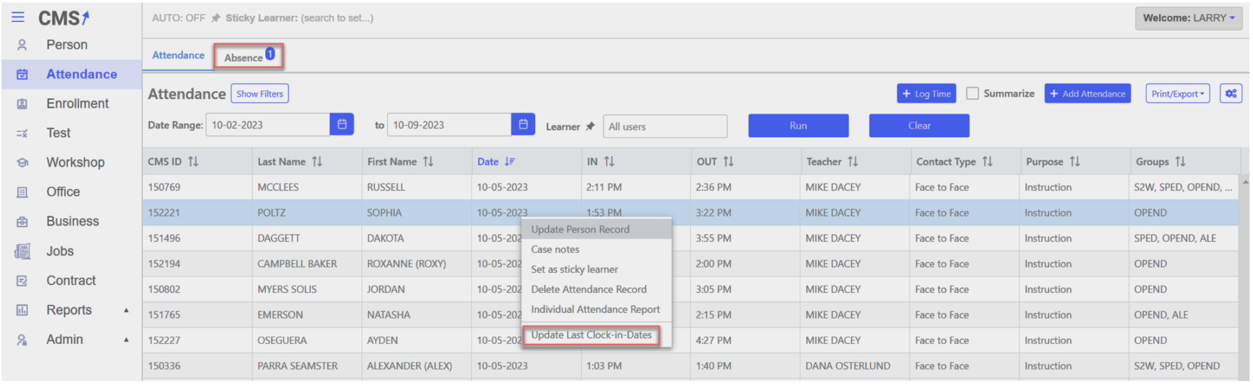
It is possible to edit the record by double clicking on the row. This will bring up the Entry/Edit dialog screen as shown below.



You can also add a new attendance record manually by clicking on the **+Add Attendance** button.

If you find that the clock-in screen is not working, the first thing you should do is reboot the machine you are using for student clock-in.

Recording an Absence

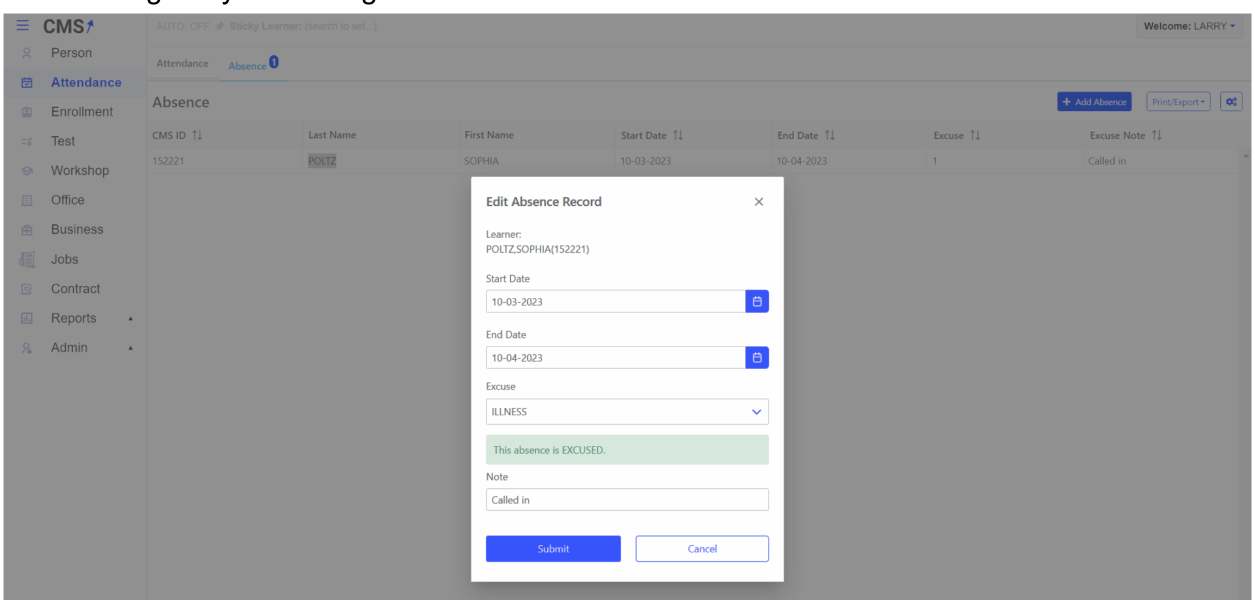


The user has clicked on an attendance record for Sophia Poltz.

The right-click menu has an item called “**Update Last Clock-In Dates”.** This option updates **every** student’s last clock-in date which is required for an accurate Roster report.

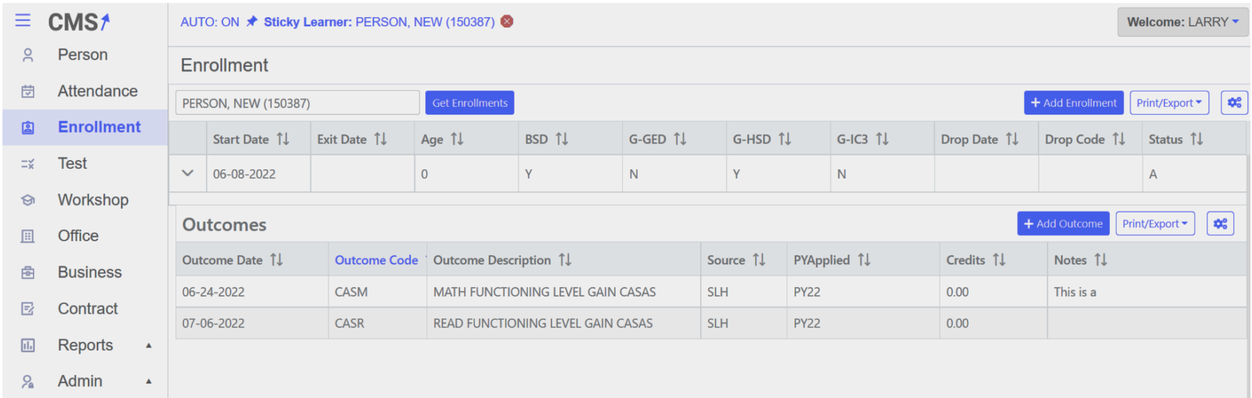
Just so happens that Sophia has one **Absence** record. The Absence tab displays **ALL** the absence records that are associated with the selected student for the selected date range.

Clicking the Absence tab displays a data grid and double-clicking the absence record brings up the following entry/edit dialog:



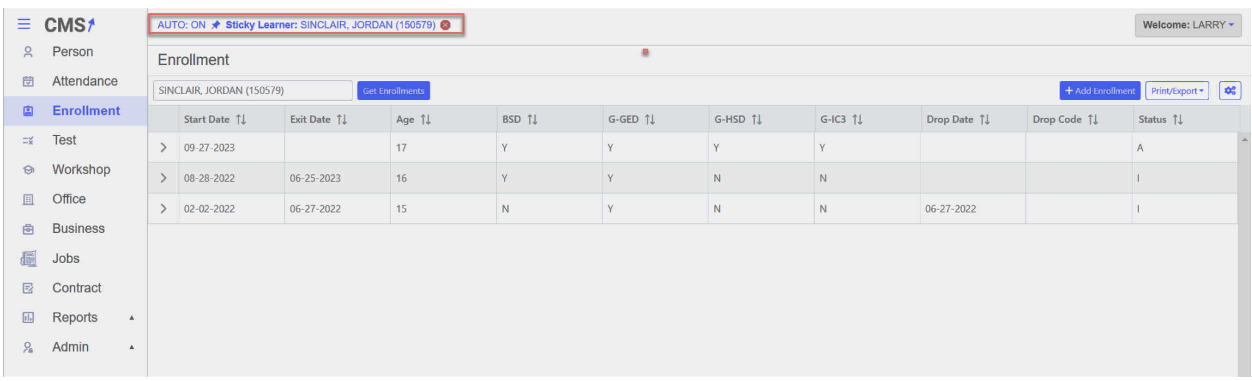
You cannot enter an Absence in advance. You have to wait till the first day of the absence to do the data entry.

Enrollment



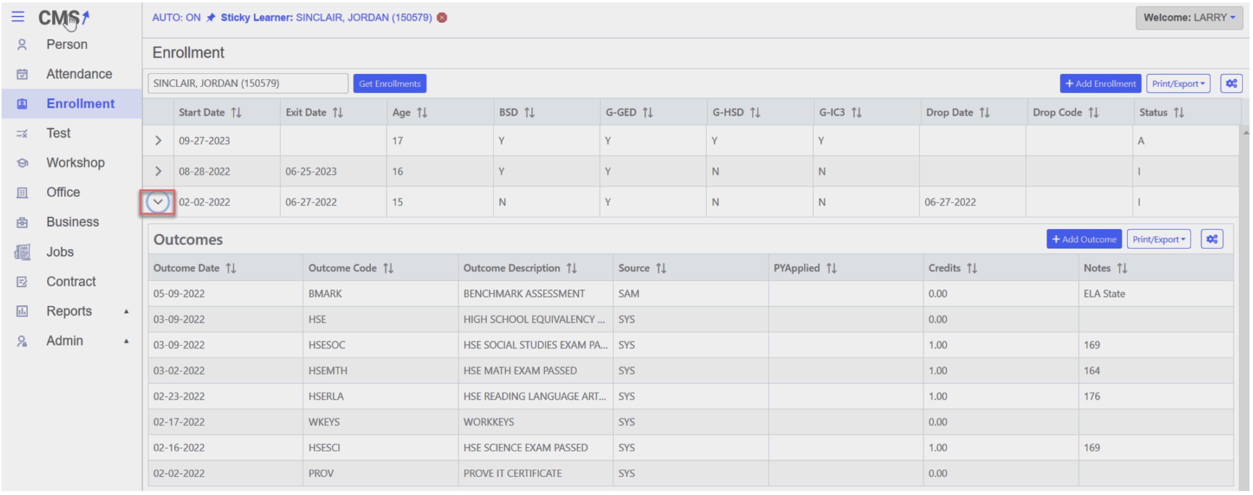
If Sticky Learner is set, as it is in this case, all the enrollment and outcome records will be displayed for that learner. **To clear the Sticky Learner click the red "x".**

Let's set another sticky learner and then select the Enrollment Tab.



I will expand the last record:

This UI is Different

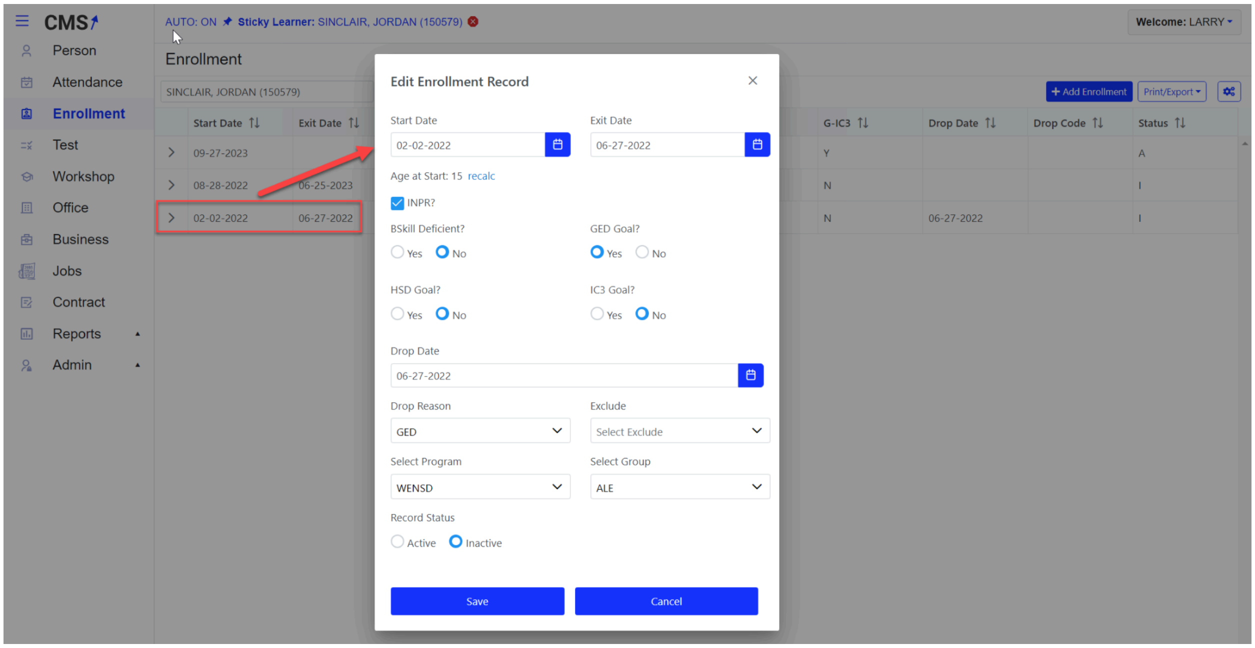


This UI is different in some notable ways. Outcomes are child records to Enrollment. Each Enrollment record may have one or more Outcomes. In all the other parts of the system where there is a one-to-many relationship, when you click on a parent record, you will see a tab at the top labeled after the name of the child table with a little number beside it. This number tells you how many child records there are, if any.

If you click on the Business, the number of Branches will show in the little blue circle and in order to see the branches you need to click on the Branches tab. Likewise, if you click on a Branch record, the Contracts tab will display how many contracts we have written with that branch.

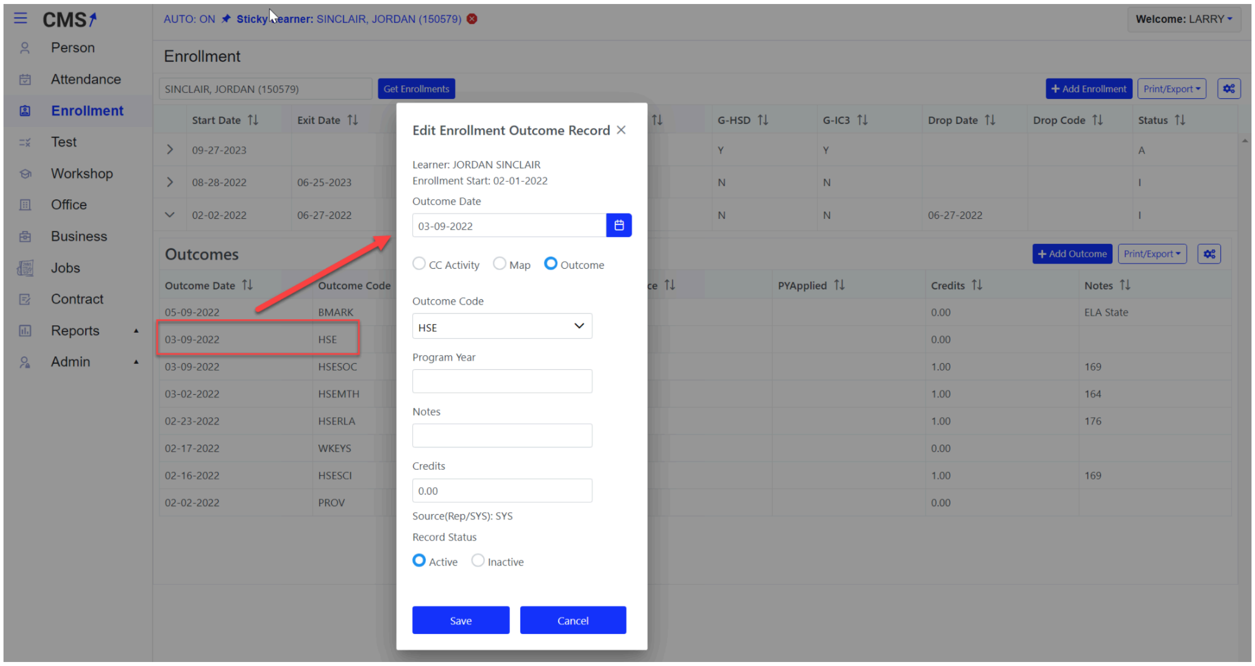
Enrollments do not work like this. There is a little down icon outlined in red above. Clicking on this will open up a sub-table showing all the related outcomes. The screen shot above shows all the related Outcomes for the Enrollment record selected. Double-clicking on a row will bring up an entry/edit dialog for that record as shown on the next page.

The Enrollment Entry/Edit Screen



The enrollment record allows us to track program participation over time. Many of our participants have been with us for many years. Some unexpected circumstance may cut a participation short and we may not see them again until many months later. We will end the first enrollment and create a new enrollment record when they return. All that they achieve while with us is captured in the **Enrollment Outcomes** screen. Every outcome is associated with an enrollment record.

The Outcome Entry/Edit Screen



The Outcome table allows us to record the positive things that are achieved while a participant is with us. The three radio buttons near the top determine what Outcome codes will be available in the Outcome Code drop-down list right below. There are many possible outcomes:

CC Activity: Career Competency Activity

APPR APPRENTICESHIP
CMLEVEL CM LEVEL CHANGE
EMPL EMPLOYMENT
HSD HSD DIPLOMA EARNED
HSE HIGH SCHOOL EQUIVALENCY EXAM PASSED
IC3 IC3 CERTIFICATION
ICRED INDUSTRY RECOGNIZED CREDENTIAL
JOBCO JOB CORPS
MCAA MCAS ACCESS CERTIFICATION
MCAE MCAS EXCEL CERTIFICATION
MCAO MCAS OUTLOOK CERTIFICATION
MCAP MCAS POWERPOINT CERTIFICATION
MCAW MCAS WORD CERTIFICATION
MILIT MILITARY
MOA MOS ACCESS CERTIFICATION
MOE MOS EXCEL CERTIFICATION
MOEX MOS EXCEL EXPERT CERTIFICATION
MOO MOS OUTLOOK CERTIFICATION
MOP MOS POWERPOINT CERTIFICATION
MOW MOS WORD CERTIFICATION
MOWX MOS WORD EXPERT CERTIFICATION
NOEX EXCLUDED FROM RETENTION MEASURE
NONE NO RETENTION OUTCOME
OTHER OTHER PRE-APPROVED CREDENTIAL
PROV PROVE IT CERTIFICATE
PSED POST-SECONDARY ED
RESC REENTERED HIGH SCHOOL/COLLEGE ABE
STCRED ST CREDENTIAL
WKEYS WORKKEYS
WKEYS-G WORKKEYS GOLD

Map: Measure of Academic Progress

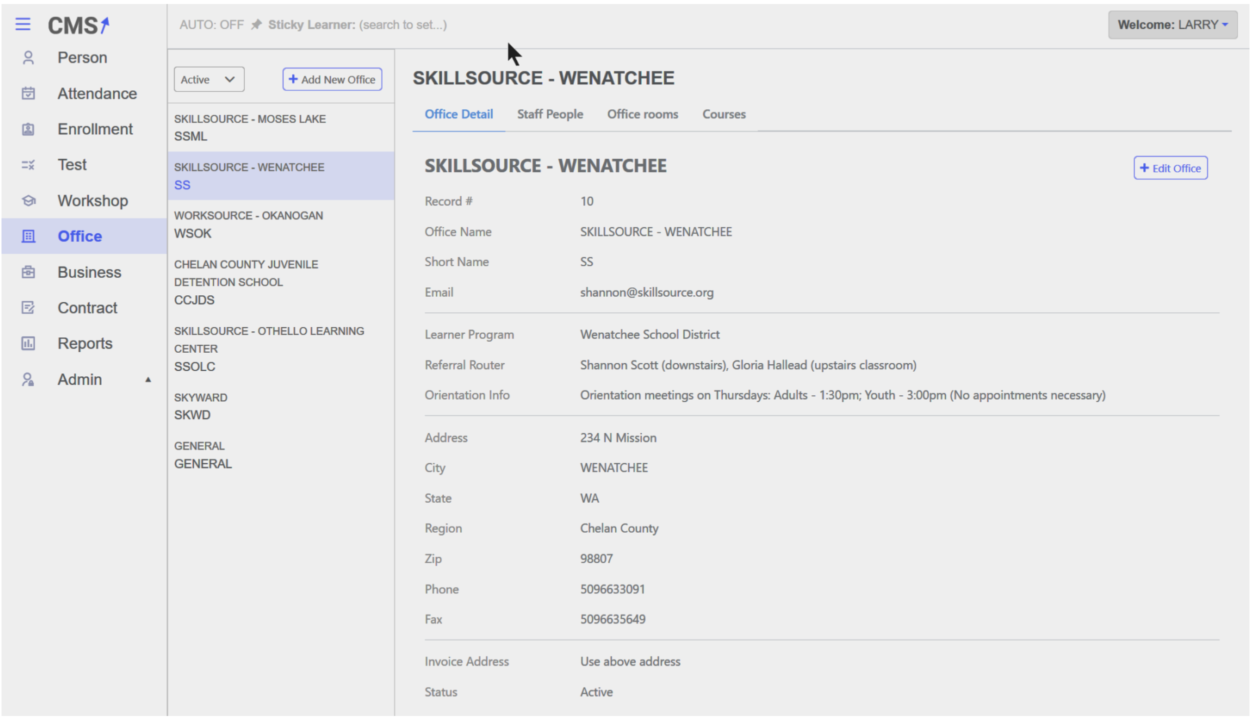
BMARK BENCHMARK ASSESSMENT
CASM MATH FUNCTIONING LEVEL GAIN CASAS
CASM3 CASAS MATH 3 POINT GAIN
CASM5 CASAS MATH 5 POINT GAIN
CASR READ FUNCTIONING LEVEL GAIN CASAS
CASR3 CASAS READING 3 POINT GAIN
CASR5 CASAS READING 5 POINT GAIN
CENROLL COLLEGE ENROLLMENT
CREADY COLLEGE READINESS COURSEWORK
CREDIT REDITS EARNED
GEDMATH GED MATH EXAM PASSED
GEDRLA GED READING LANGUAGE ARTS EXAM PASSED
GEDSCI GED SCIENCE EXAM PASSED
GEDSOC GED SOCIAL STUDIES EXAM PASSED
HSEMTH HSE MATH EXAM PASSED
HSERLA HSE READING LANGUAGE ARTS EXAM PASSED
HSESCI HSE SCIENCE EXAM PASSED
HSESOC HSE SOCIAL STUDIES EXAM PASSED
ICRED INDUSTRY RECOGNIZED CREDENTIAL (IAP)
PHSEMT5 PRE HSE MATH 5 POINT GAIN
PHSEMTH PRE HSE MATH TEST PASSED
PHSERL5 PRE HSE RLA 5 POINT GAIN
PHSERLA PRE HSE READING TEST PASSED
PHSESC5 PRE HSE SCIENCE 5 POINT GAIN
PHSESCI PRE HSE SCIENCE TEST PASSED
PHSESOC PRE HSE SOCIAL STUDIES TEST PASSED
PHSESS5 PRE HSE SOCIAL STUDIES 5 POINT GAIN
PROVEIT PROVE IT GAIN
STCREDM SHORT TERM CREDENTIAL (IAP)
TRLEVEL TRANSITION TO HIGHER LEVEL COURSEWORK
WKGAIN WORKEYS LEVEL GAIN
WKLEARN WORK-BASED LEARNING EXPERIENCE
WREADY WORK READINESS TRAINING

Outcome: Other General Outcomes

APPREN	APPRENTICESHIP
BUSINT	BUSINESS INTERNSHIP
COOPWSL	COOPERATIVE WORKSITE LEARNING
INSTWSL	INSTUTIONAL WORKSITE LEARNING
OTHCCL	OTHER CAREER CONNECTED LEARNING
PREAPRN	PRE-APPRENTICESHIP
VBUSINT	VIRTUAL BUSINESS INTERNSHIP

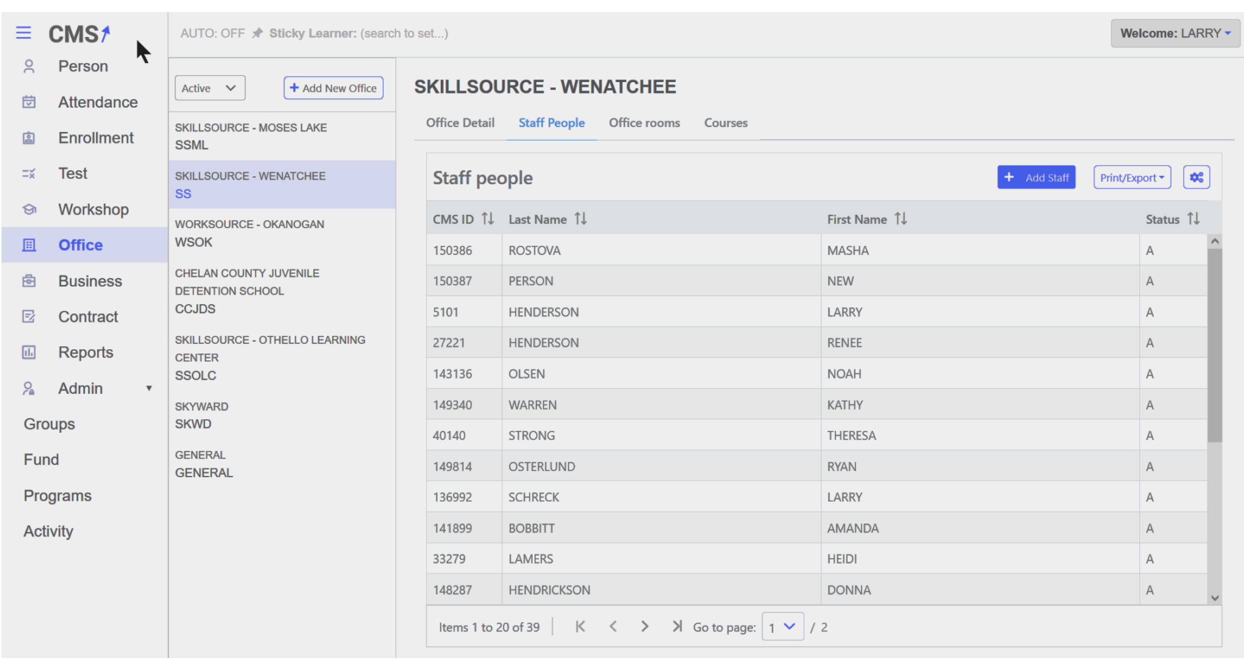
Office

Office Detail

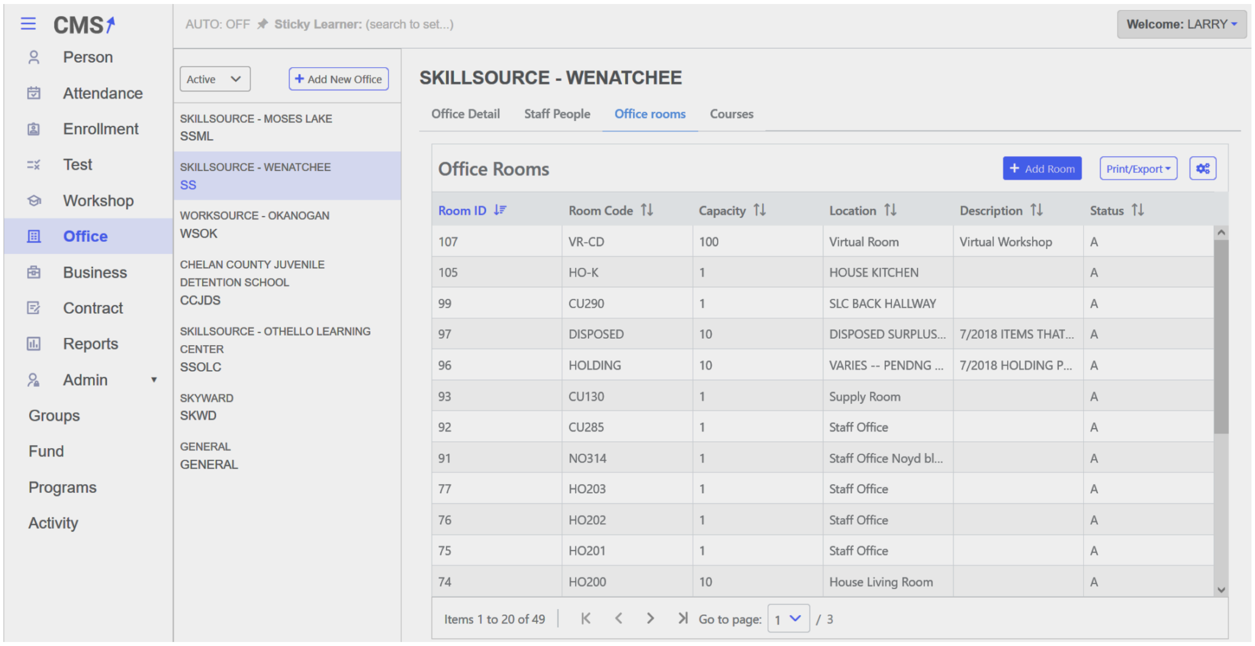


All staff are associated with one or more **Offices**. Many of the drop-down selections throughout the application are constrained to the office of the logged-in user.

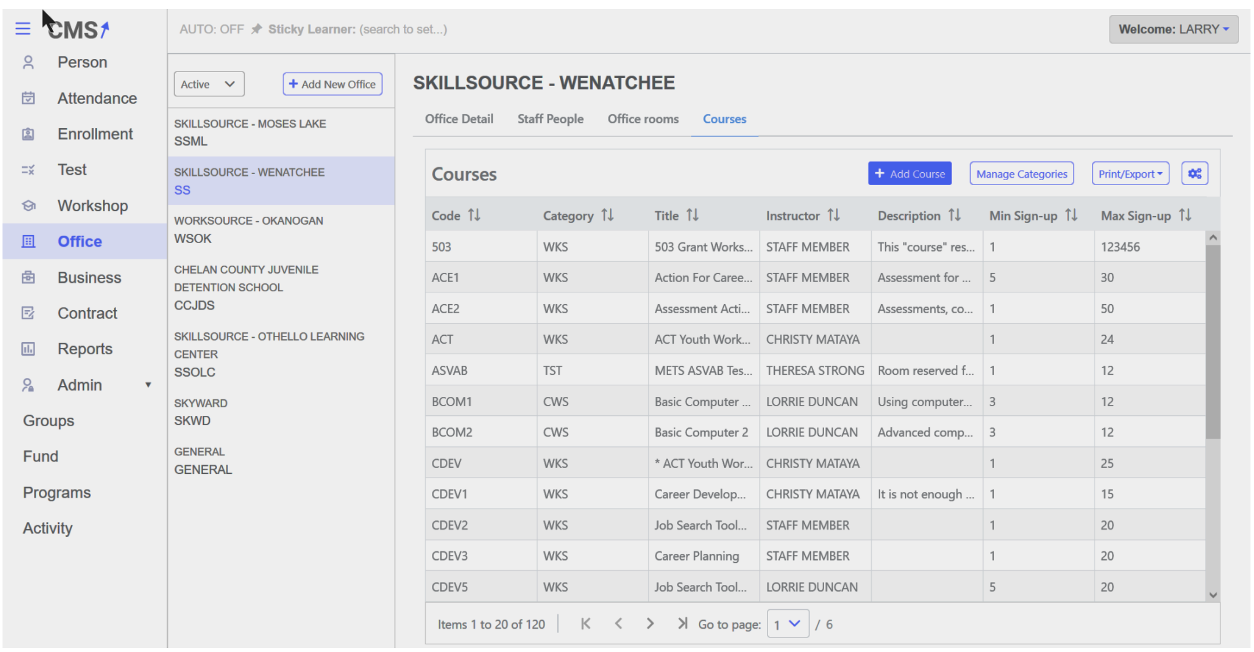
Office Staff



Office Rooms

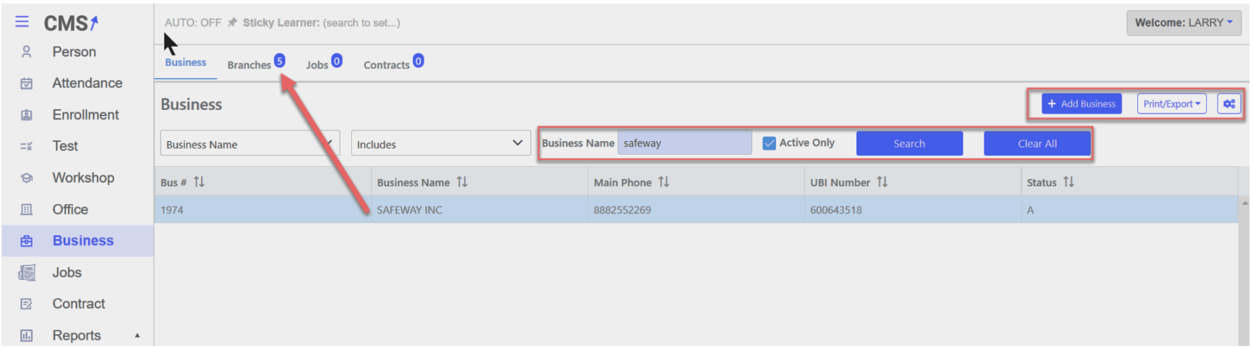


Office Courses



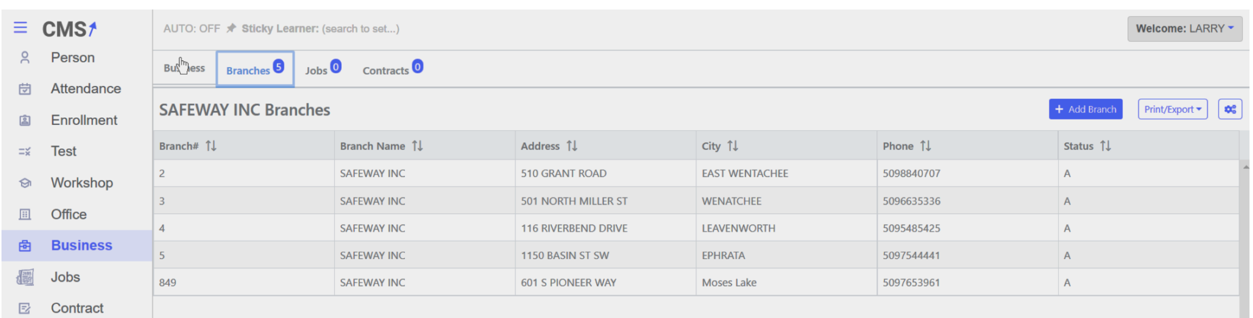
Business

Let's search for the business **Safeway**.



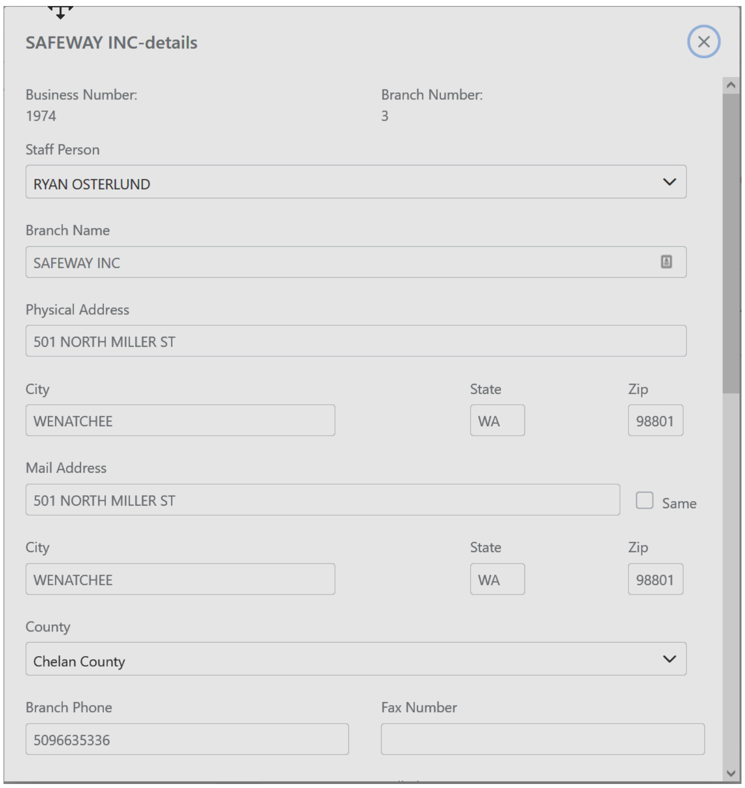
Notice the red arrow above. If a business has branches the branch count will appear in the small blue circle that is part of the Branch tab when you select (single click) a business. This is the only visual clue that branch records exist.

But if you select the Branch tab you will see the following screen displaying all the associated Safeway branches:



If you click ONCE on a branch record (row) you will see the Jobs tab and the Contracts tab display the number of Jobs and/or the number of contracts that are directly associated with that business branch.

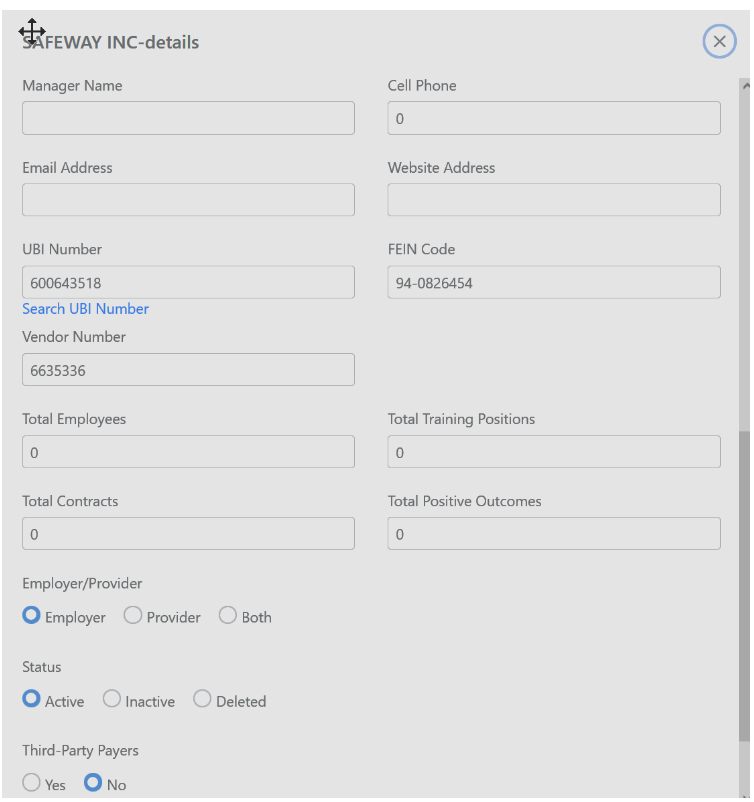
Double clicking on any row in the Branches grid will bring up the entry/edit dialog for that selected record. The following is the Branch entry/edit dialog:



Notes on this entry/edit dialog:

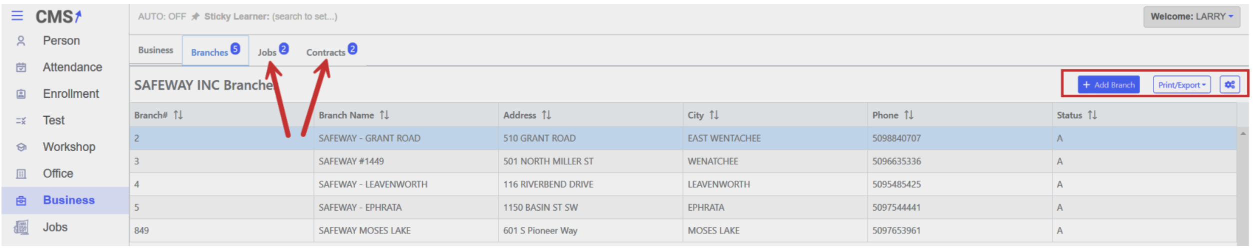
The Staff Person dropdown should display the staff who is the primary contact for that business. If the staff person is not on the list please select **Staff Member** from the list.

For multi-branch businesses, it is often helpful to include some location data with the Branch Name. For example, the name here could be SAFEWAY - MILLER STREET.



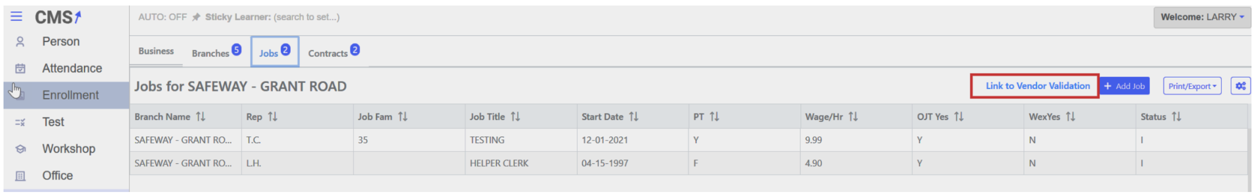
Total Employees: This is an optional data element but good to record here if you can get it.
Total Training Positions: This is also optional.
Total Contracts: Eventually this will be automatically updated by the system whenever a new contract is created.
Total Positive Outcomes: This will also be automatically updated whenever a decision is made about what constitutes a positive outcome.

Clicking the **Jobs** tab display all the associated jobs



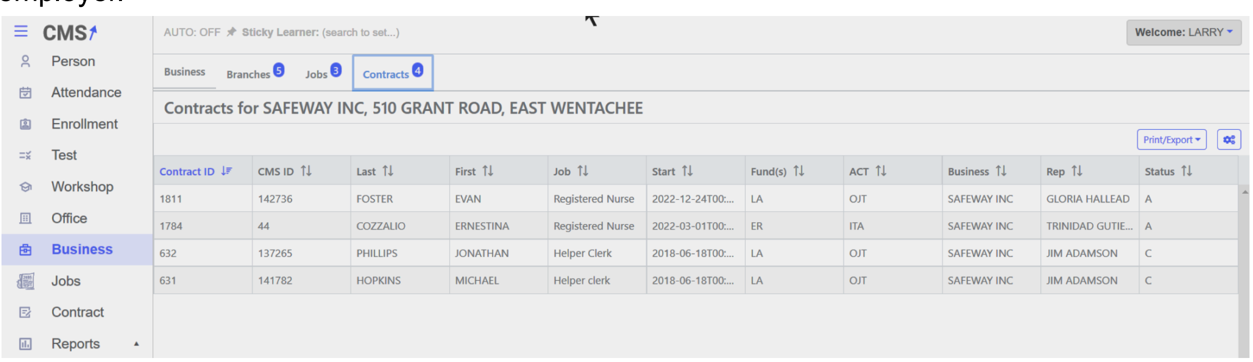
Double clicking a row will bring up an Entry/Edit dialog.

Active openings have an Active status.

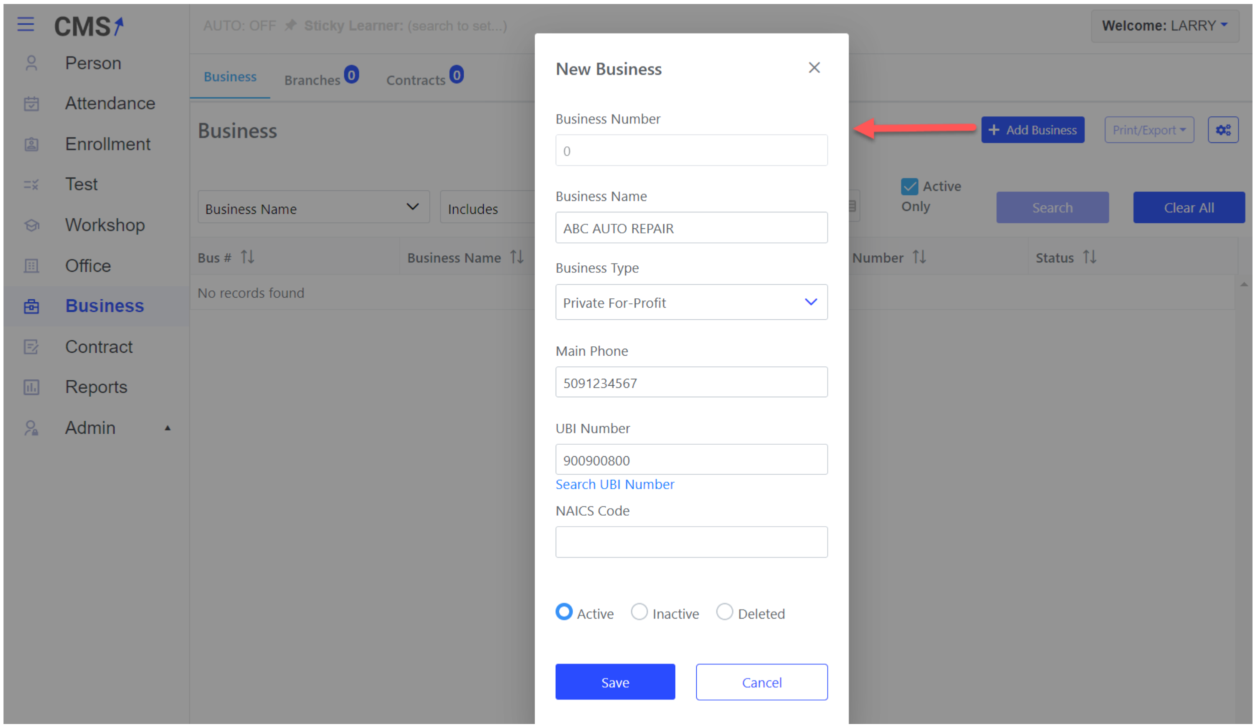


Double clicking a row will bring up an Entry/Edit dialog. Notice that the Jobs screen has a link to the Vendor Validation document.

Clicking the Contracts tab displayed all the contracts that have been generated for this employer.

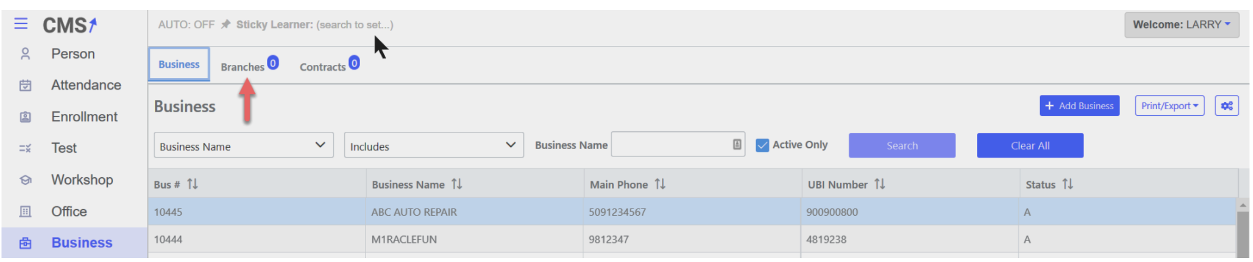


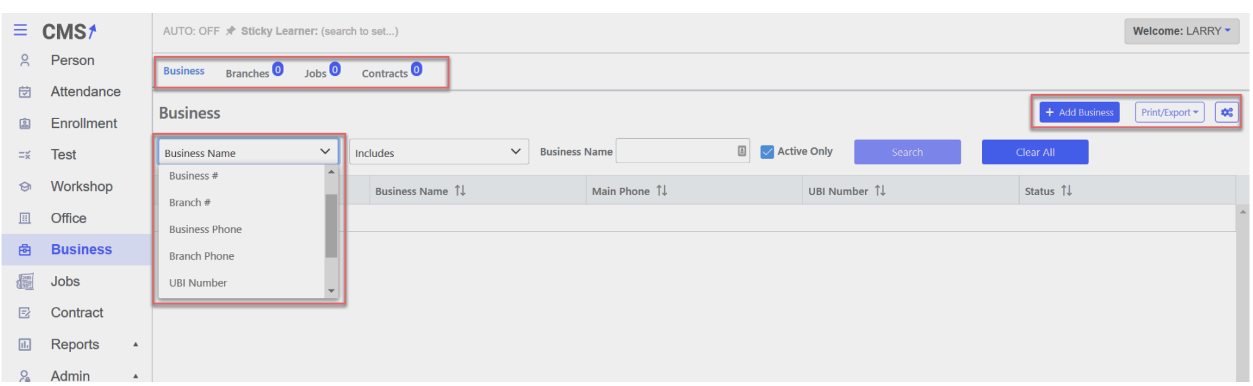
Double clicking a row will bring up an Entry/Edit dialog.



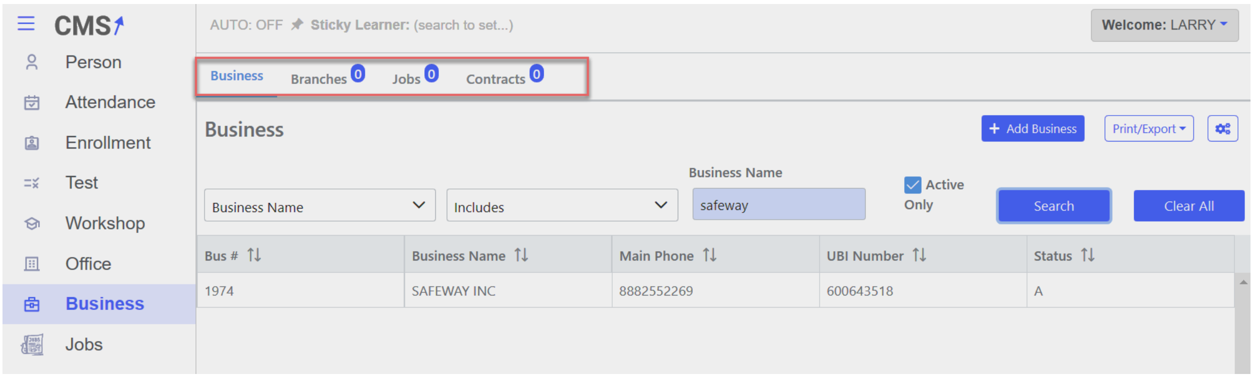
Clicking the New Business button brings up this Entry/Edit dialog. All the fields are required except the NAICS Code.

When you click “Save” the new record will appear as a top row in the grid. Single click on the new row and then click on the Branches tab in order to create a new branch record.

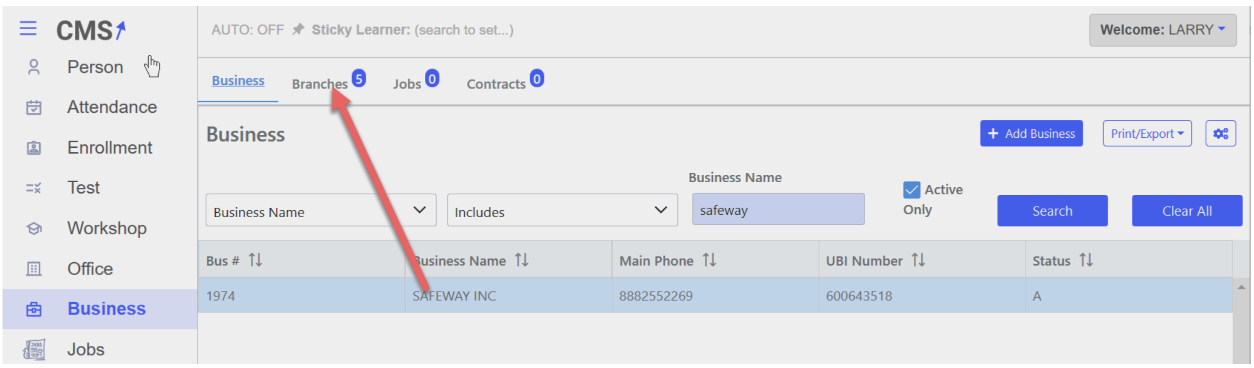




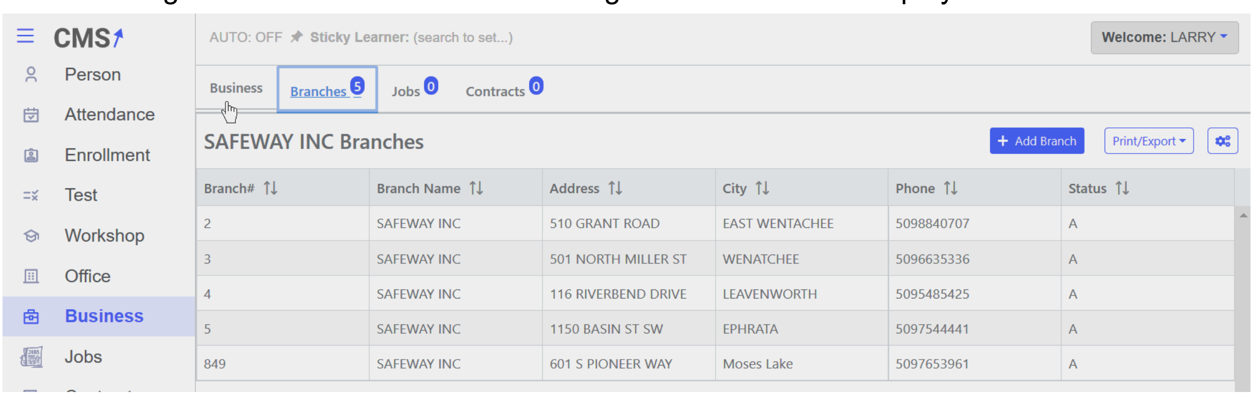
The Business Grid Tabs



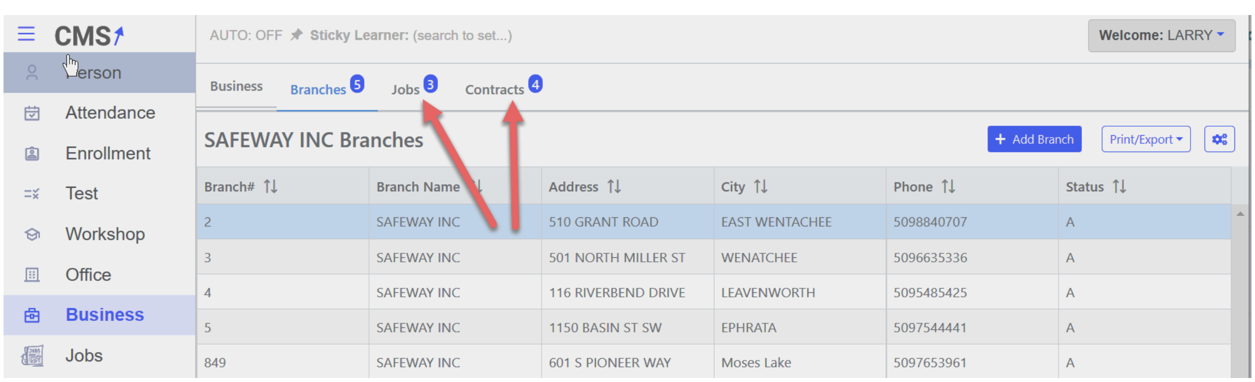
Notice what happens when you click on a Business record



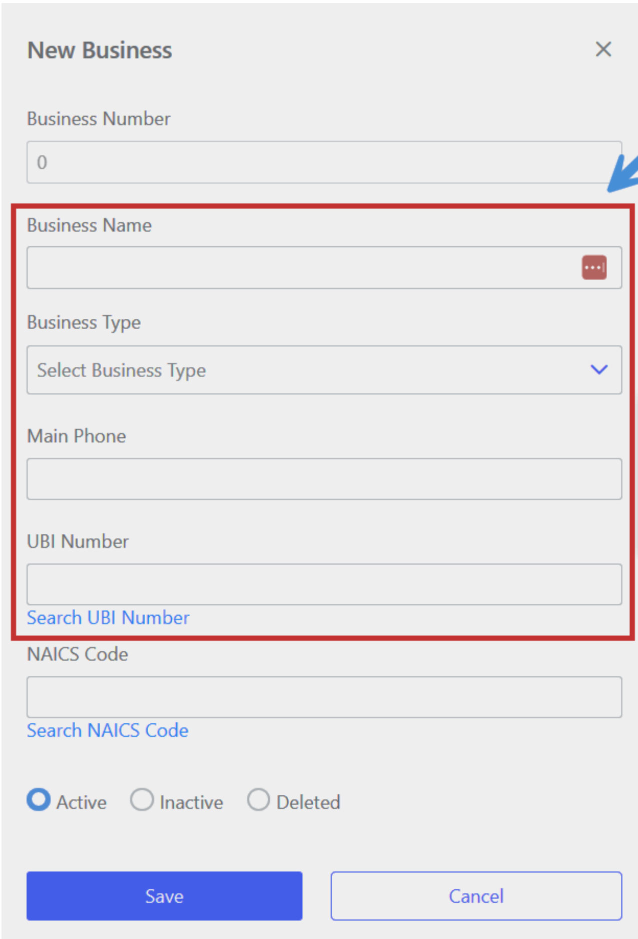
When clicking on the Branches tab the following list of branches is displayed.



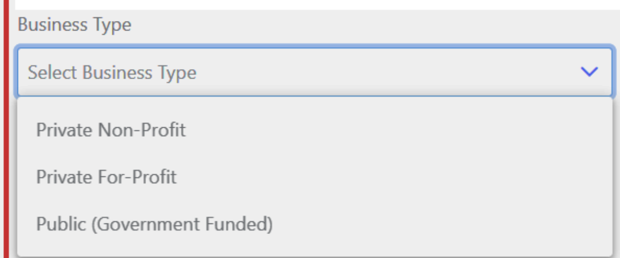
Notice what happens when you click on a Branch record



Adding A New Business Record



These 4 pieces of information are required to create a new Business record. The Business Number is auto assigned by the database and the NAICS Code is optional. The Name, Phone and UBI are enforced unique by the database.



Most of the time there will only be one Business record and one Branch record. But in the case of a multi-branch business, there can be any number of branches tied to a single Business record. The business name, phone and UBI number are automatically copied to the branch record when the branch record is created.

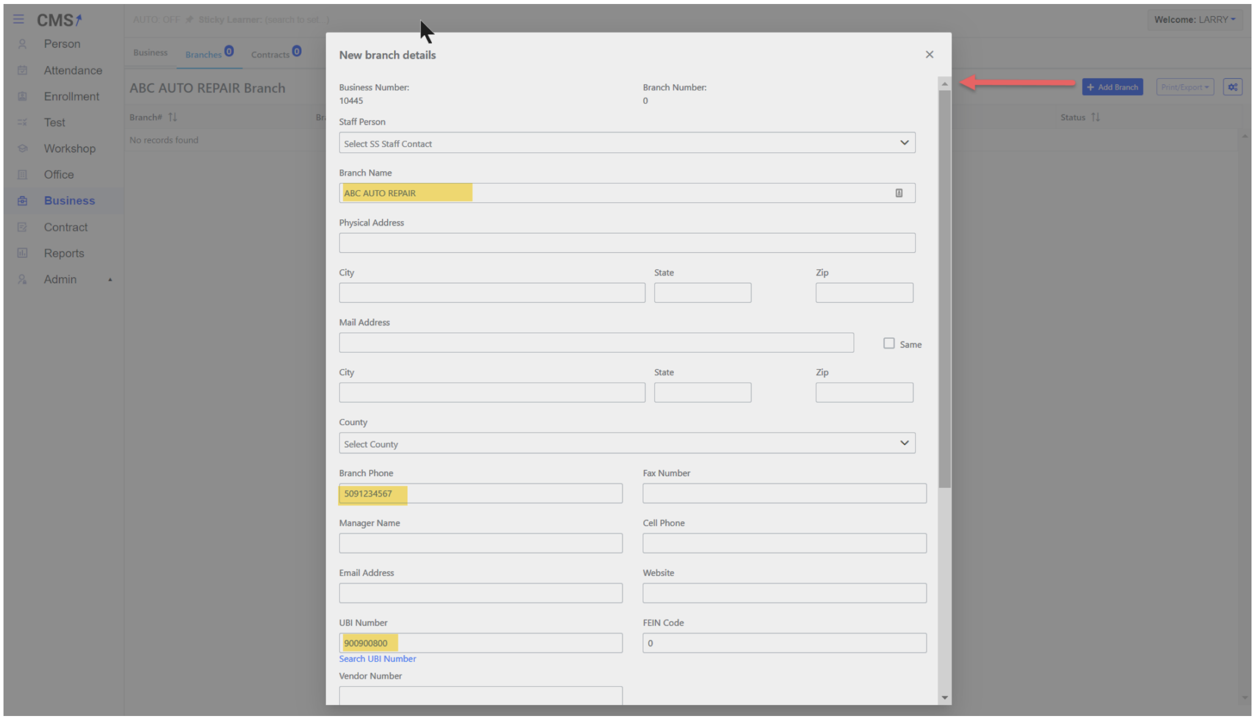
Why is this important?

1. The unique fields help us prevent duplicate records. Before we create a new record we attempt to find an existing record by one or more of these fields. If those searches fail we know we can create a new record with confidence.

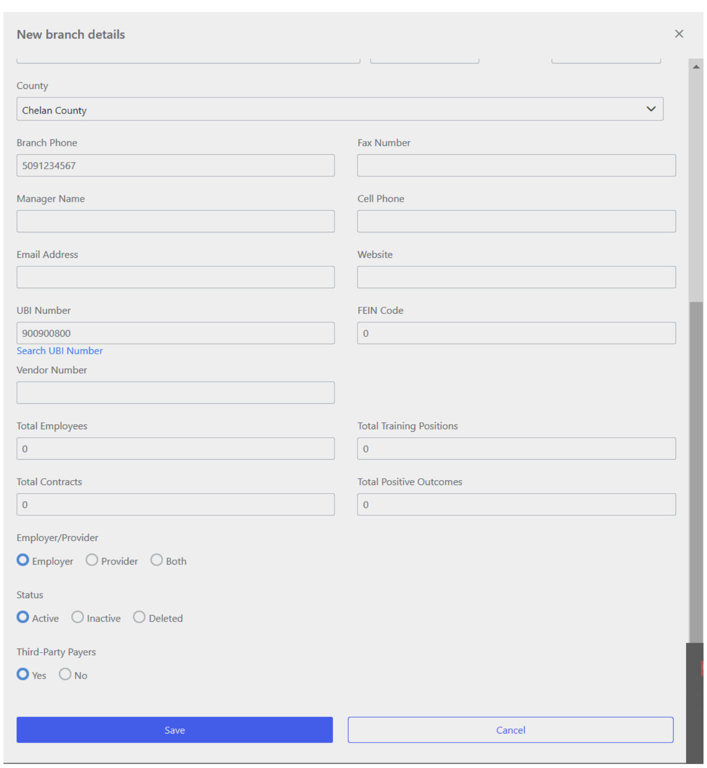
2. The UBI number is our verification and documentation that the business is operating legally in the State of Washington.

Data Entry Tip: We can copy the Main Phone and UBI from another source and simply paste them one at a time into the form above. During the Paste process all of the special characters will be stripped from the values leaving just the numbers. The () and - or . characters in phone numbers will be removed and the typical - in UBI numbers will also be removed.

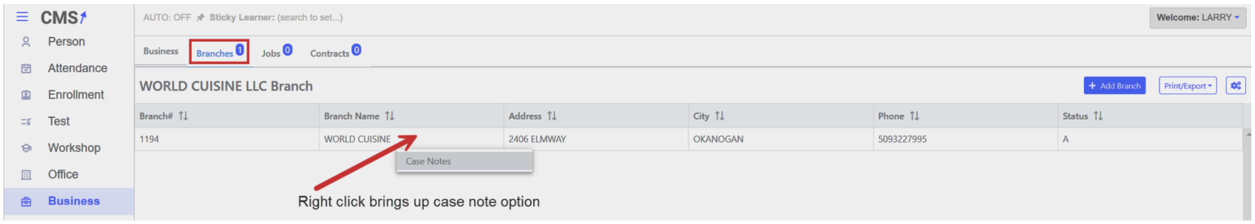
Business Branch



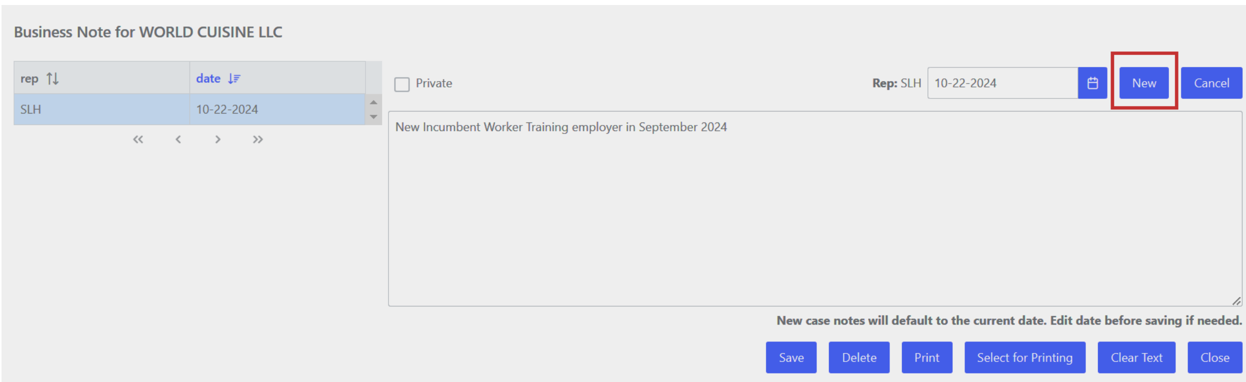
Click the New Branch button to enter branch details. The items highlighted in yellow are brought down from the business record as defaults. It is recommended, when entering multi-branch records, that you include some location information in the Name. You will be required to enter the Staff assigned and the address information at a minimum. If the Staff person is not on the list just use Staff Member. The County field is required.



Adding A Business Branch Case Note



Casenotes can only be added to a Branch record. When you click the Case Notes option you will see the following screen:



The panel on the left lists all the case notes that have been added to this business branch record. If you want to add a new note, click the **New** button that you see on the top right. You will be able to confirm the date (defaults to the current date) which you can edit as needed. Then just type in your note in the Textarea provided. When finished click the **Save** button.

How To Add a New Multi-Branch Business

Example of a multi-branch business: (to illustrate what we mean by Business Branch)

Those who create new business/branch records may need to do a little research. This is important not only to prevent duplicate records but also to support the CMS contracting system, which depends on accurate business branch records.

AUT TO MOCHA INC
UBI (Uniform Business Identifier) **601-981-772** (UBI Lookup Link)

Phone:
(509) 664-8042

NAICS(North American Industry Classification System)(Optional)
722515 (NAICS Lookup Link)

Address: (see branch locations below)

The following mailing address may be included in each branch record.
524 S MISSION ST (Mailing)
WENATCHEE WA 98801-3048

Locations: (Branches) The branch name should include some location information

- **Aut To Mocha (1355 Fifth)** - 1355 Fifth St, Wenatchee, WA 98801 - (509) 664-8042
- **Aut To Mocha (407 Fifth)** - 407 Fifth St, Wenatchee, WA 98801 - (509) 667-9189
- **Aut To Mocha (536 Mission)** - 536 S Mission St, Wenatchee, WA 98801 - (509) 664-6660
- **Aut To Mocha (220 Grant)** - 220 Grant Rd, East Wenatchee, WA 98802 - (509) 886-2229
- **Aut To Mocha (725 Grant)** - 725 Grant Rd, East Wenatchee, WA 98802 - (509) 881-2623
- **Aut-To Mocha (603 Cotlets)** - 603 Cotlets Way, Cashmere, WA 98815 - (509) 782-4289

The following pages list the current multi-branch business in the database.

Examples of Multi-Branch Businesses

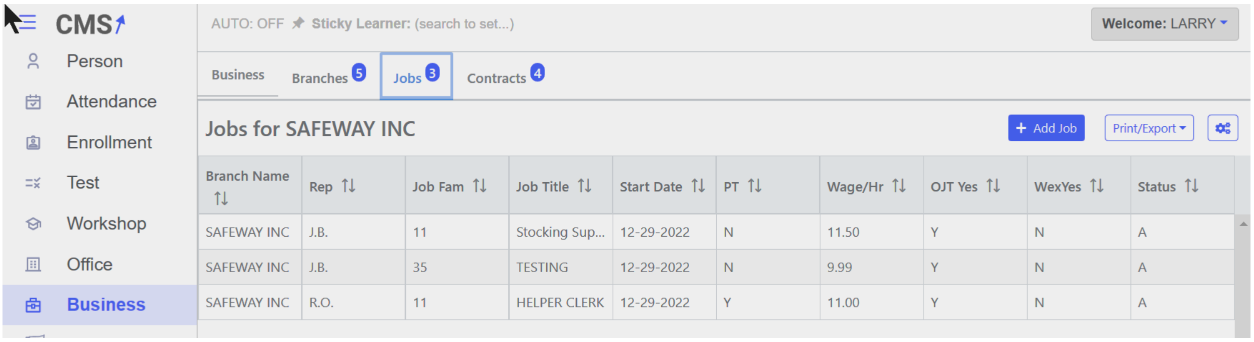
businessID	*businessName*	*branchID*	*branchName*
70	CITY OF WENATCHEE	430	CITY OF WENATCHEE - MAIN OFFICE
		431	PARKS AND RECREATION
		432	PUBLIC LIBRARY
		433	PUBLIC WORKS DEPARTMENT
86	WENATCHEE VALLEY COLLEGE	340	WENATCHEE VALLEY COLLEGE
		406	WENATCHEE VALLEY COLLEGE-OMAK
90	EAGLE TRANSFER CO	296	EAGLE ADMIN SERVICES
		600	EAGLE TRANSFER CO
97	OMAK PUBLIC LIBRARY	278	OMAK PUBLIC LIBRARY
		665	TONASKET PUBLIC LIBRARY
102	WENATCHEE SCHOOL DISTRICT #246	196	WENATCHEE HIGH SCHOOL
		617	WENATCHEE SCHOOL DISTRICT
183	CITY OF MOSES LAKE	593	CITY OF MOSE LAKE
		1114	MOSES LAKE MUSEUM AND ART CENTER
186	JR SIMPLOT CO	570	JR SIMPLOT
		687	JR SIMPLOT CO
196	BIG BEND COMMUNITY COLLEGE	331	BIG BEND COMMUNITY COLLEGE
		612	BIG BEND COMMUNITY COLLEGE OJT
		636	BBCC LEARNING CENTER CHILD CARE
240	UNIVERSITY OF WASHINGTON	697	UNIVERSITY OF WASHINGTON TACOMA
		972	UNIVERSITY OF WASHINGTON
270	OKANOGAN COUNTY	619	OKANOGAN COUNTY COMMISSIONER'S OFFICE
		637	OKANOGAN COUNTY ASSESSOR
		1231	OKANOGAN COUNTY CLERKS OFFICE
384	LES SCHWAB TIRE CENTERS OF WASHINGTON INC	334	LES SCHWAB - MOSES LAKE
		335	LES SCHWAB - EAST WENATCHEE
		336	LES SCHWAB - WENATCHEE
		506	LES SCHWAB - TWISP
427	EYE & EAR CLINIC	274	EYE & EAR CLINIC OF OKANOGAN
		505	EYE & EAR CLINIC OF WENATCHEE
440	GOODWILL INDUSTRIES OF THE COLUMBIA	316	GOODWILL - WENATCHEE
		474	GOODWILL INDUSTRIES - MOSES LAKE
		810	GOODWILL - EAST WENATCHEE
601	SKAUG BROTHERS INC / CARPET ONE	358	SKAUG BROTHERS INC / CARPET ONE
		414	SKAUG BROTHERS INC / SPEEDY AUTO
		624	SKAUG BROTHERS GLASS

616	FARMERS INSURANCE	290	DARREN STEELE INS AGENCY INC
		477	FARMERS INSURANCE: ALBERTA CANNON
		836	FARMERS INSURANCE GARZA INSURANCE AGENCY
		1189	FARMERS INSURANCE
1551	OIC OF WASHINGTON	338	OIC OF WENATCHEE
		339	OIC OF MOSES LAKE
1692	SPECTRUM COMMUNICATIONS	811	SPECTRUM COMMUNICATIONS
		935	SPECTRUM WENATCHEE
1910	FAMILY HEALTH CENTERS	681	FAMILY HEALTH CENTERS
		901	FAMILY HEALTH CENTERS
1963	NORTH CASCADES BANK	521	NORTH CASCADES BANK
		936	NORTH CASCADES BANK
		937	NORTH CASCADES BANK
1974	SAFEWAY INC	2	SAFEWAY - GRANT ROAD
		3	SAFEWAY #1449
		4	SAFEWAY - LEAVENWORTH
		5	SAFEWAY - EPHRATA
		849	SAFEWAY MOSES LAKE
2245	CATHOLIC FAMILY & CHILD SERVICE	552	CATHOLIC CHARITIES OF THE DIOCESE OF YAKIMA
		1055	CATHOLIC CHARITIES CENTRAL WA
2758	NORTH CENTRAL CREDIT UNION	128	NUMERICA CREDIT UNION (WENATCHEE)
		988	NUMERICA CREDIT UNION (E. WENATCHEE)
2874	SKILLSOURCE	172	SKILLSOURCE - WENATCHEE
		322	SKILLSOURCE - MOSES LAKE
2976	MONROE HOUSE RETIREMENT & CARE CENTER	601	LAKE RIDGE CENTER
		696	MONROE HOUSE RETIREMENT & CARE CENTER
3711	AAA READY MIX INC II	744	AAA READYMIX LL INC (MOSES LAKE)
		883	AAA READY MIX II INC (WENATCHEE)
3747	THE HOME DEPOT #4701	12	HOME DEPOT - WENATCHEE
		13	HOME DEPOT - MOSES LAKE
4439	REHABILITATION AND EVALUATION SERVICES, INC	457	RES, INC (WEN)
		494	RES, INC (ML)
		495	RES, INC (YAKIMA)
4902	BOYS AND GIRLS CLUB	669	BOYS AND GIRLS CLUB OF NESPELEM
		1037	BOYS AND GIRLS CLUB OF THE COLUMBIA BASIN
5023	WASHINGTON MUTUAL BANK	6	WAMU - EAST WENATCHEE FINANCIAL CENTER
		7	WAMU - WENATCHEE FINANCIAL CENTER
		8	WAMU - EPHRATA FINANCIAL CENTER
		9	WAMU - CHELAN FINANCIAL CENTER
		10	WAMU - MOSES LAKE FINANCIAL CENTER

		11	WAMU - OMAK FINANCIAL CENTER
5207	CHELAN COUNTY	439	CHELAN COUNTY PUBLIC WORKS
		444	CHELAN COUNTY CONSERVATION DISTRICT
		785	CHELAN COUNTY COMMUNITY DEVELOPMENT
		786	CHELAN COUNTY AUDITOR
5834	WAL MART ASSOCIATES INC	397	WAL-MART STORE #2187
		398	WAL-MART SUPERCENTER STORE #2007
		399	WAL-MART SUPERCENTER STORE #3260
		400	WAL-MART SUPERCENTER STORE #3217
		401	WAL-MART SUPERCENTER STORE #1947
5847	BURGER KING INTERNATIONAL	378	BURGER KING - 2842
		379	BURGER KING - 8241
		380	BURGER KING - 2848
		381	BURGER KING - 10966
		382	BURGER KING - 6130
9753	CONAGRA FOODS FOOD	581	CONAGRA FOODS LAMB WESTON
		1076	CONAGRA Lamb Weston Quincy
10089	CHINOOK LUMBER INC	376	CHINOOK LUMBER INC
		377	CHINOOK LUMBER INC - EPHRATA
10098	COLUMBIA VALLEY COMMUNITY HEALTH - CVCH	404	COLUMBIA VALLEY COMMUNITY HEALTH
		405	COLUMBIA VALLEY COMMUNITY HEALTH - CHELAN
10101	DIVISION OF VOCATIONAL REHABILITATION (DVR)	417	DIVISION OF VOCATIONAL REHABILITATION (DVR)
		418	DIVISION OF VOCATIONAL REHABILITATION (DVR) - OMAK
		419	DIVISION OF VOCATIONAL REHABILITATION (DVR) - ML
10111	SERVICE ALTERNATIVES	456	SERVICE ALTERNATIVES
		530	SERVICE ALTERNATIVES, INC
10116	CENTRAL WASHINGTON UNIVERSITY	467	CENTRAL WASHINGTON UNIVERSITY - WENATCHEE
		1056	CENTRAL WASHINGTON UNIVERSITY - MOSES LAKE
		1181	CENTRAL WASHINGTON UNIVERSITY - ELLENSBURG
10203	COLVILLE GAMING LLC	632	12 TRIBES RESORT CASINO
		775	COLVILLE TRIBES
10211	SENIOR CENTER THRIFT STORE	642	SENIOR CENTER THRIFT STORE
		779	EPHRATA SENIOR CENTER THRIFT STORE
10217	WORKSOURCE CHELAN/GRANT COUNTY	653	WORKSOURCE CHELAN/GRANT COUNTY
		1198	EMPLOYMENT SECURITY DEPARTMENT
10220	GROCERY OUTLET	656	GROCERY OUTLET EAST WENATCHEE
		858	GROCERY OUTLET EPHRATA
		1233	GROCERY OUTLET - OMAK
10235	NEW HOPE	678	NEW HOPE
		690	GRANT COUNTY DIRECTIONS IN COMMUNITY LIVING

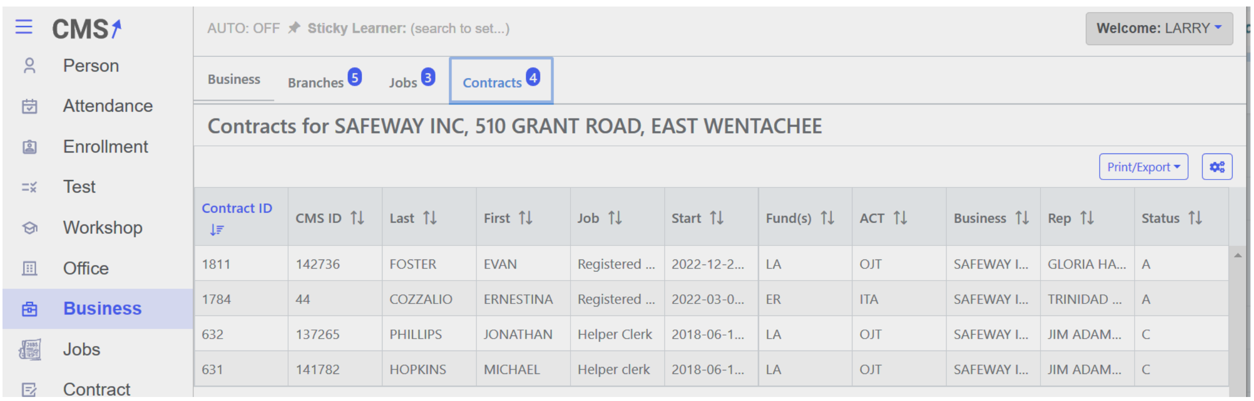
10246	AKINS FOOD INC	692	AKINS FOODS INC
		772	AKIN'S FOODS
10312	WSU CHELAN-DOUGLAS CO EXTENSION	797	WSU CHELAN CO EXTENSION
		1193	WSU DOUGLAS CO EXTENSION
10450	CUSTOM APPLE PACKERS, INC (STARR)	859	STARR RANCH QUINCY
		993	ONEONTA STARR RANCH GROWERS
25514	BOULDER BEND GLASSWORKS	1012	BOULDER BEND GLASSWORKS - WENATCHEE
		1014	BOULDER BEND GLASSWORKS - PESHASTIN
25574	COUNTRY FINANCIAL	1096	COUNTRY FINANCIAL
		1128	COUNTRY FINANCIAL
		1145	COUNTRY FINANCIAL - OMAK
25587	NORTH CENTRAL REGIONAL LIBRARY	1098	NORTH CENTRAL REGIONAL LIBRARY - SOAP LAKE
		1122	NORTH CENTRAL REGIONAL LIBRARY
25613	NORTH CASCADES LAW GROUP, PLLC	1126	NORTH CASCADES LAW GROUP, PLLC - Tonasket
		1127	NORTH CASCADES LAW GROUP, PLLC - Okanogan
25628	HALO LOXX	1142	HALO LOXX
		1143	RENEW SALON AND SPA
25651	OXARC	1166	OXARC - WENATCHEE
		1167	OXARC - WEN
		1168	OXARC - MOSES LAKE
		1169	OXARC - OKANOGAN
25701	LIVE NATION	1222	GORGE AMPHITHEATER
		1223	LEGENDS HOSPITALITY, LLC
25704	CHELAN DOUGLAS CHILD SERVICES ASSOCIATION	1226	WENATCHEE CENTER
		1227	METHOW CENTER
		1228	WESTSIDE CENTER
		1229	SUNSET RIDGE

When clicking on the Jobs tab the following list of jobs is displayed.



Branch Name	Rep	Job Fam	Job Title	Start Date	PT	Wage/Hr	OJT Yes	WexYes	Status
SAFEWAY INC	J.B.	11	Stocking Sup...	12-29-2022	N	11.50	Y	N	A
SAFEWAY INC	J.B.	35	TESTING	12-29-2022	N	9.99	Y	N	A
SAFEWAY INC	R.O.	11	HELPER CLERK	12-29-2022	Y	11.00	Y	N	A

When clicking on the Contracts tab the following list of Contracts is displayed;



Contract ID	CMS ID	Last	First	Job	Start	Fund(s)	ACT	Business	Rep	Status
1811	142736	FOSTER	EVAN	Registered ...	2022-12-2...	LA	OJT	SAFEWAY I...	GLORIA HA...	A
1784	44	COZZALIO	ERNESTINA	Registered ...	2022-03-0...	ER	ITA	SAFEWAY I...	TRINIDAD ...	A
632	137265	PHILLIPS	JONATHAN	Helper Clerk	2018-06-1...	LA	OJT	SAFEWAY I...	JIM ADAM...	C
631	141782	HOPKINS	MICHAEL	Helper clerk	2018-06-1...	LA	OJT	SAFEWAY I...	JIM ADAM...	C

Double click on any row to bring up an entry/edit dialog for the selected contract.

I hope it is abundantly clear how important it is to prevent duplicate records in the Business database. A single **Business** can have many branches and a **Branch** can have multiple **Job** openings and/or multiple **Contract**s and multiple **Casenote**s. If there are duplicate records in the database for a single Business the possible proliferation of bad data is exponential! The next section will explain the benefits of a clean and accurate business database.

See the section on [What is the Value of Recording all Business Interactions](#).

Why an Accurate De-Duplicated Business Database is Important

As a Workforce Innovation and Opportunity Act (WIOA) agency, having and maintaining an accurate business database offers numerous benefits that can enhance the efficiency and effectiveness of your operations. Here are some key values:

1. **Improved Employer Engagement**:
    - **Relationship Building**: An accurate database helps in building and maintaining strong relationships with local employers, making it easier to understand their needs and offer tailored workforce solutions.
    - **Communication**: Facilitates timely and effective communication with employers regarding job openings, workforce training programs, and other relevant opportunities.
2. **Enhanced Job Matching**:
    - **Accurate Job Listings**: Ensures that job seekers have access to up-to-date and accurate job listings, improving their chances of finding suitable employment.
    - **Skill Alignment**: Helps in aligning job seekers' skills with employers' needs, leading to better job placements and satisfaction for both parties.
3. **Efficient Resource Allocation**:
    - **Targeted Services**: Enables the agency to target resources and services more effectively to areas of greatest need, such as specific industries or regions with higher demand for workers.
    - **Training Programs**: Assists in the development of training programs that are directly aligned with the needs of local businesses, ensuring that the workforce is equipped with relevant skills.
4. **Data-Driven Decision Making**:
    - **Labor Market Insights**: Provides valuable insights into labor market trends, helping the agency make informed decisions about program offerings and policy initiatives.
    - **Performance Metrics**: Allows for the tracking and analysis of key performance metrics, such as employment rates and job retention, to measure the effectiveness of workforce programs.
5. **Compliance and Reporting**:
    - **WIOA Requirements**: Ensures compliance with WIOA requirements for tracking and reporting employment outcomes, business engagement activities, and other key metrics.
    - **Funding Justification**: Provides data to justify the allocation of federal and state funding for workforce programs, demonstrating the agency's impact on the local economy.
6. **Support for Economic Development**:
    - **Business Growth**: Assists in supporting the growth and development of local businesses by connecting them with qualified talent and resources.
    - **Economic Stability**: Contributes to the overall economic stability and growth of the community by facilitating successful employment outcomes and reducing unemployment rates.

What is the Value of Recording all Business Interactions

Recording all interactions with businesses as part of Workforce Innovation and Opportunity Act (WIOA) programming is essential for several reasons. Here's a structured case:

1. Enhanced Accountability and Transparency

- **Traceable Interactions**: Recording all interactions ensures that there is a transparent, traceable record of engagement, which is critical for maintaining public trust and meeting compliance standards.
- **Data Integrity**: Having a clear and documented account of interactions helps maintain data integrity. Accurate records make it easier to account for the use of resources, especially when responding to audits or reporting requirements.

2. Improved Relationship Management

- **Business History**: Comprehensive records provide WIOA staff and future employees a full view of prior interactions, insights into preferences, and knowledge of past agreements or concerns.
- **Personalization**: With historical data, staff can better personalize follow-up interactions, tailoring services to meet the specific needs of each business, improving service quality and fostering trust.

3. Informed Decision-Making and Strategy Development

- **Data-Driven Strategies**: By analyzing recorded interactions, WIOA staff can identify trends and assess which services or approaches are most effective. This data can shape more effective workforce development strategies.
- **Tracking Engagement Effectiveness**: Continuous tracking allows staff to assess the responsiveness and outcomes of their outreach efforts, helping them refine engagement tactics and optimize allocation of resources.

4. Enhanced Coordination and Collaboration

- **Improved Internal Communication**: Recording interactions allows various WIOA team members and departments to access the same information, reducing misunderstandings or redundancies.
- **Streamlined Support Across Programs**: Many businesses engage with multiple workforce programs. By recording interactions, WIOA staff can collaborate more effectively with other programs, providing a cohesive experience to businesses.

5. Documentation of Outcomes and Impact

- **Outcome Tracking**: Tracking interactions can provide direct evidence of outcomes, such as new hires, training completions, or other business support results.

- **Impact Measurement**: Recorded interactions allow WIOA staff to capture metrics that reflect the program's impact on workforce development within a region, supporting data-driven advocacy and policy-making.

6. Efficient Use of Resources and Time Management

- **Avoiding Duplication of Efforts**: Documented interactions prevent the repetition of questions and services, as staff can quickly refer to past records, making interactions more efficient.
- **Efficient Follow-Ups**: When follow-up actions are clearly recorded, WIOA staff can quickly prioritize tasks and provide more targeted assistance, reducing the time needed to gather context in subsequent meetings.

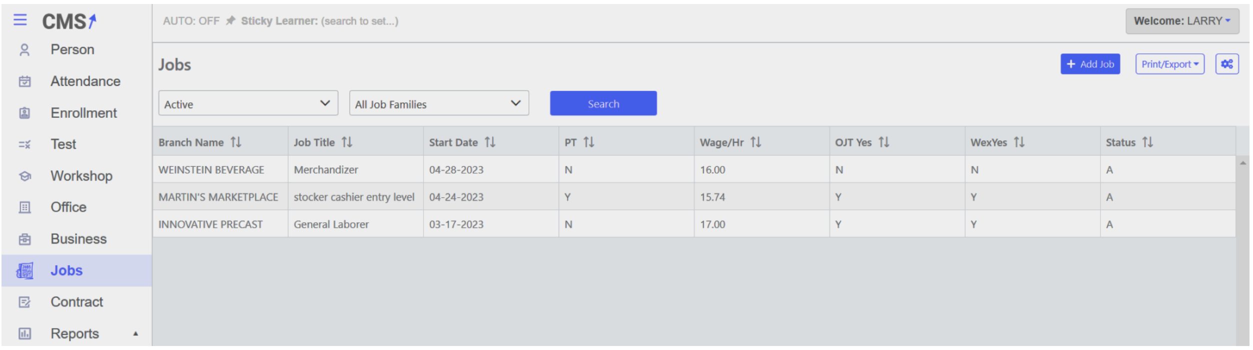
7. Compliance with Legal and Grant Requirements

- **Grant Reporting**: Many federal and state workforce programs require thorough documentation to substantiate the use of funds, outcomes achieved, and adherence to program goals.
- **Legal Protection**: Recorded interactions can protect the WIOA program and staff by providing evidence of due diligence, fair service delivery, and adherence to agreements, which is essential in case of any disputes or misunderstandings.

In summary, recording all business interactions under WIOA can significantly enhance service quality, accountability, and strategic alignment while maximizing the program's positive impact on local economies.

Jobs

Current Job Openings Grid

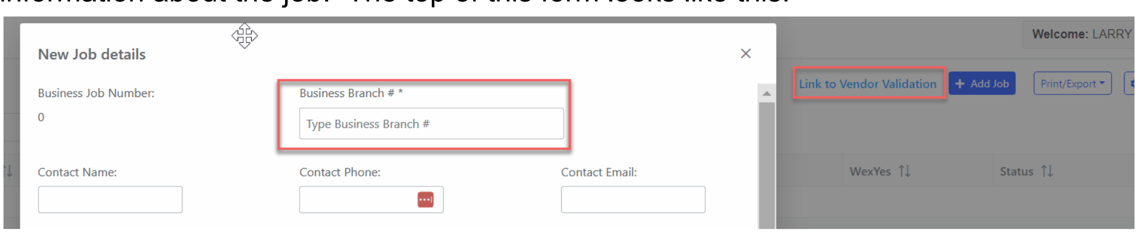


You can also get to this functionality from the Business/Business Branch area as you probably noticed in the previous screen shots.

The purpose of this is to provide an easy way to manage current unfilled position openings among our business customers. Only job records with an Active(A) status will show up on this screen. You can right click on a job(row) and select “Remove from list” to take jobs off the list when they are filled. This action simply changes the Status from “A” to “I” for Inactive.

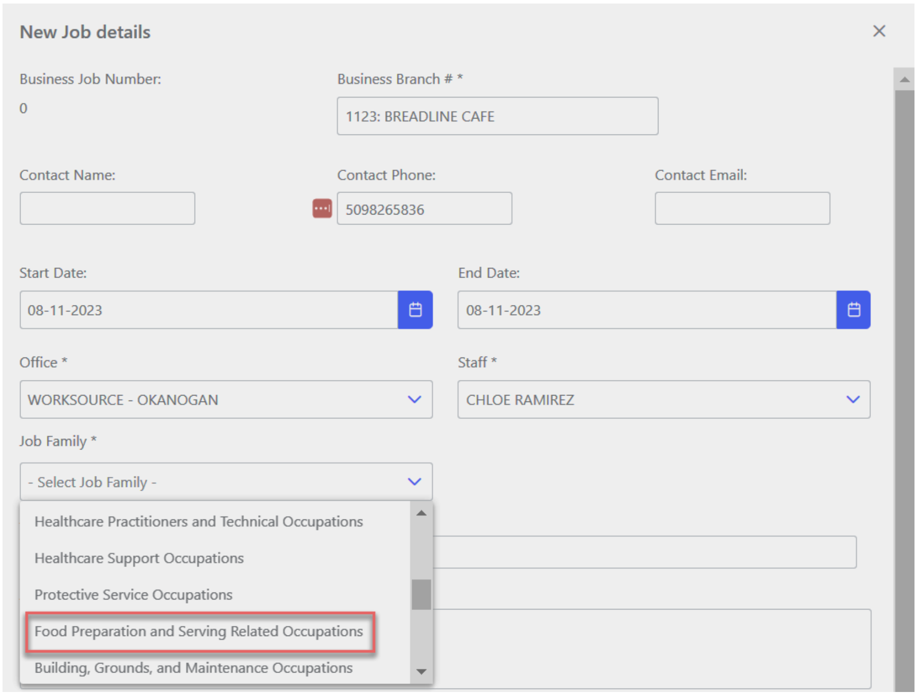
The following is one way this functionality can be used:

1. All information about possible job opportunities can be entered into CMS **regardless** of the job’s potential to become a WEX or OJT. It is highly desirable to capture as much as we know about a business as soon as we know it and begin adding business casenotes so that everyone in the office can get good current information about the business and our touch points. You can access the casenotes using a right-click option on the branch record (row).
2. When you click the blue **Add Job** button you will be shown an entry/edit form to record information about the job. The top of this form looks like this:



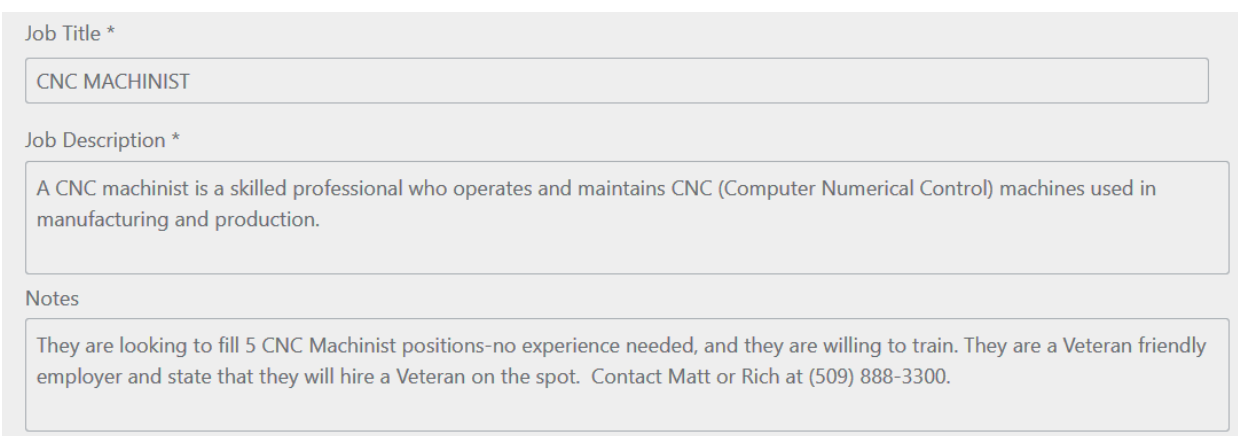
The Business Branch# field shown above is a **multi-functional** field. You **do not** have to know the branch number to use it. Just start typing any part of the business name you are looking for and you will discover quickly if the business branch exists. *If the business branch does not exist, then close the form by clicking the ‘x’ in the upper right corner and then click “**Link to Vendor Validation**” and enter what you know about the business in this shared google sheet*. And yes, this is easy enough for you to do right on the phone with the potential employer. It usually takes less than 24 hours and often less than one hour to get the business branch record created. Whoever creates the business branch will update the google sheet entry with the business branch number. Once you have that number you can come back to the Jobs tab, click **Add Job** and enter the number in the Business Branch # field and complete the rest of the form.

3. When creating a new job opening, you will be asked to classify it by picking from a **Job Family** list:



The Start Date is required. The End Date is an optional field. Or you can just enter the current date in both fields if neither is known.

The form includes two fields for general information: **Job Description** and **Notes**:



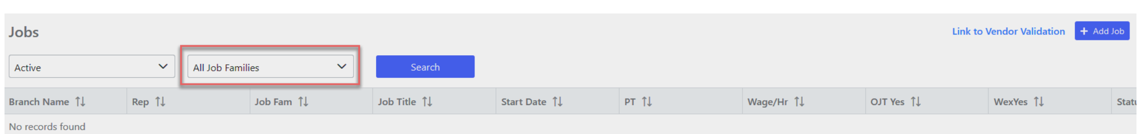
These fields are limited to 250 characters.

List of Job Families

Job Families: (the number is the first two digits of the ONET code and the percentage shows historically the most frequently chosen families. Most of our jobs over the past 10 years have been assigned families 29, 43 or 53)

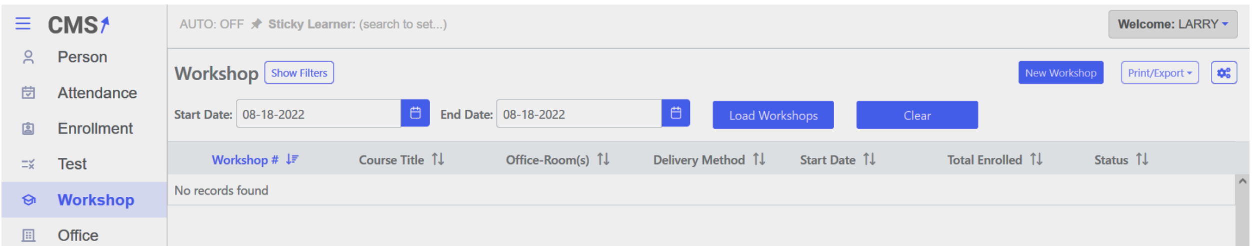
- 11 **Management Occupations (2.6%)**
- 13 **Business and Financial Operations Occupations (1.7%)**
- 15 **Computer and Mathematical Occupations (3.6%)**
- 17 Architecture and Engineering Occupations (0.5%)
- 19 **Life, Physical, and Social Science Occupations (1.1%)**
- 21 **Community and Social Services Occupations (2.3%)**
- 23 Legal Occupations (0.2%)
- 25 Education, Training, and Library Occupations (0.9%)
- 27 Arts, Design, Entertainment, Sports, and Media (0.6%)
- **29** **Healthcare Practitioners and Technical Occupations (13.04%)**
- 31 **Healthcare Support Occupations (6.5%)**
- 33 Protective Service Occupations (0.07%)
- 35 **Food Preparation and Serving Related Occupations (2.2%)**
- 37 Building, Grounds, and Maintenance Occupations (0.8%)
- 39 **Personal Care and Service Occupations (1.8%)**
- 41 **Sales and Related Occupations (2.38%)**
- **43** **Office and Administrative Support Occupations (12.90%)**
- 45 Farming, Fishing, and Forestry Occupations (0.1%)
- 47 **Construction and Extraction Occupations (3.1%)**
- 49 **Installation, Maintenance, and Repair Occupations (3.9%)**
- 51 **Production Occupations (5.9%)**
- **53** **Transportation and Material-Moving Occupations (35.30%)**
- 55 Military Specific Occupations (0%)

This classification will help staff find jobs by a specific job family.

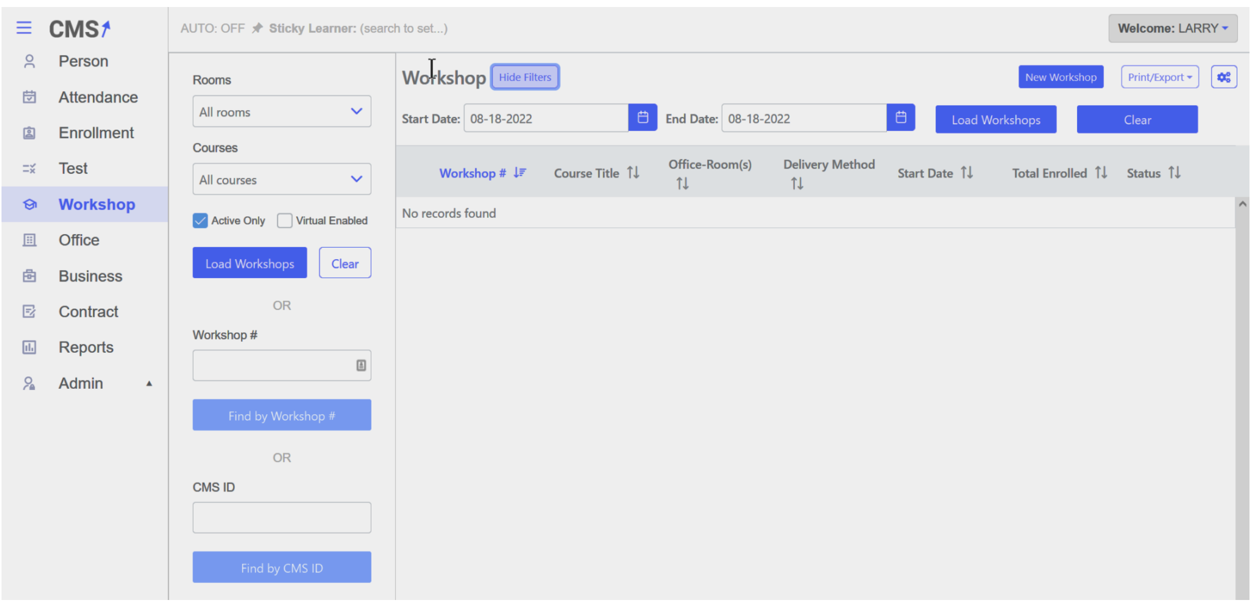


Workshop

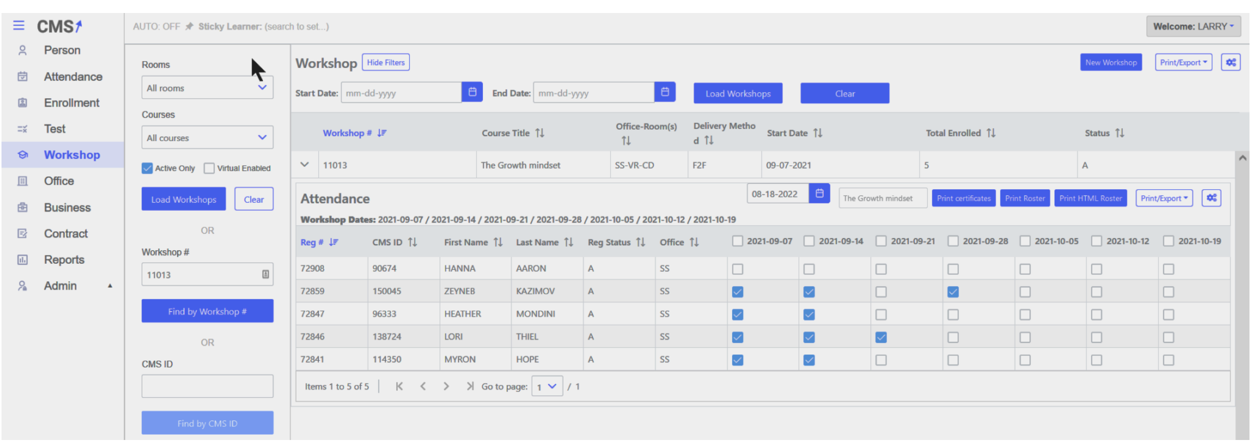
Finding Workshops



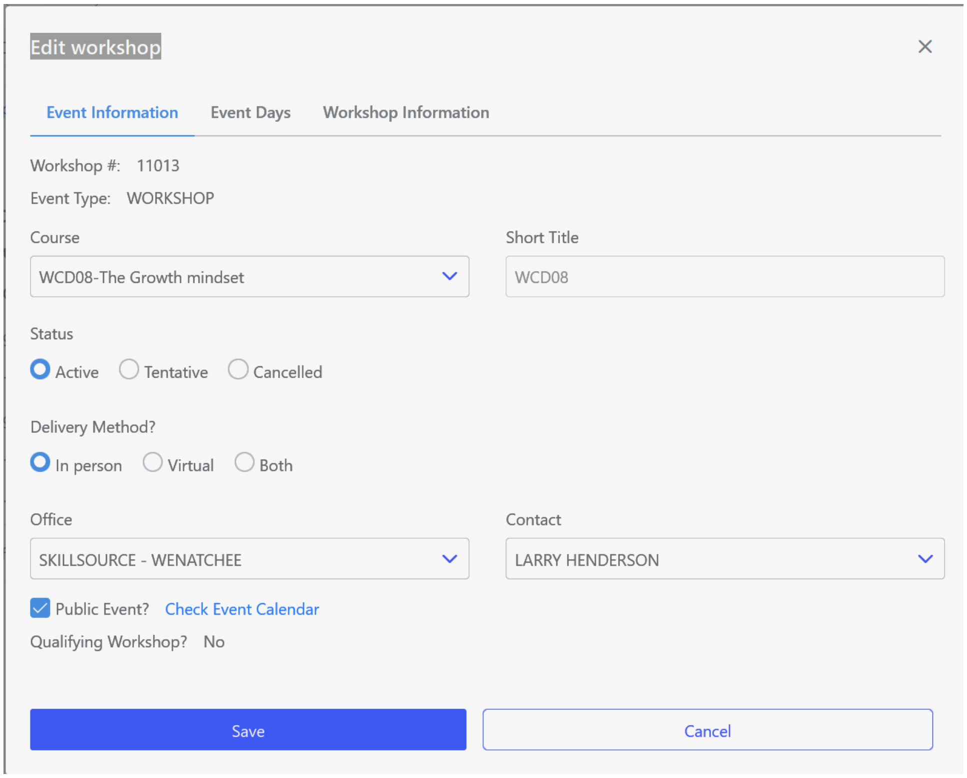
When you click the **Show Filters** button on the screen above the following side dialog will appear.



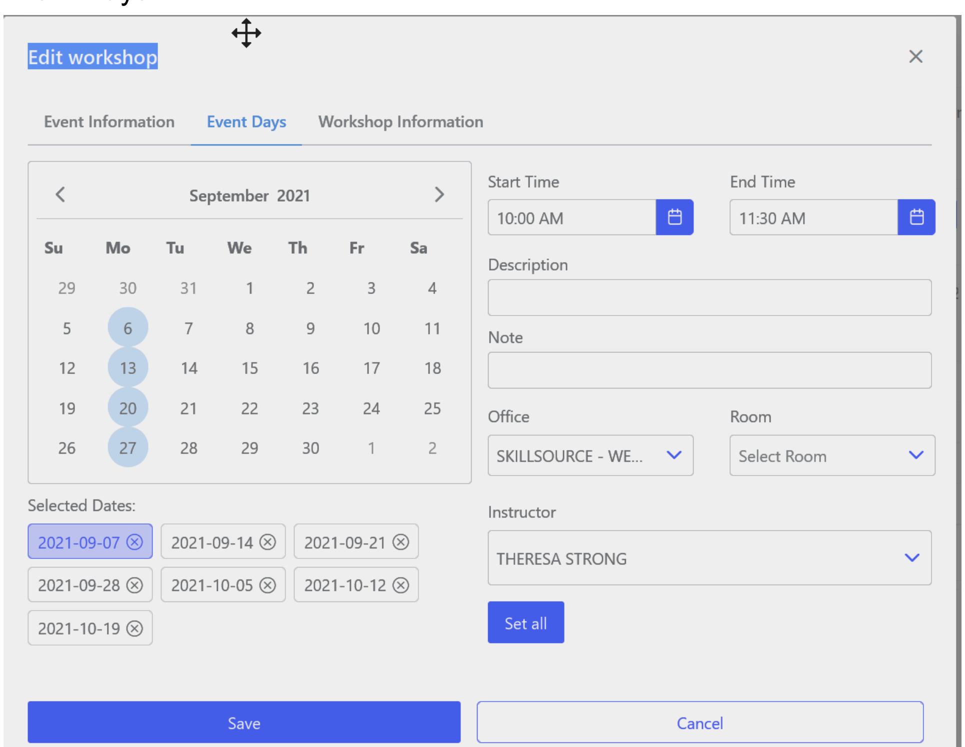
In the following dialog I have looked up a workshop #11013 and have it showing all the attendance as well.



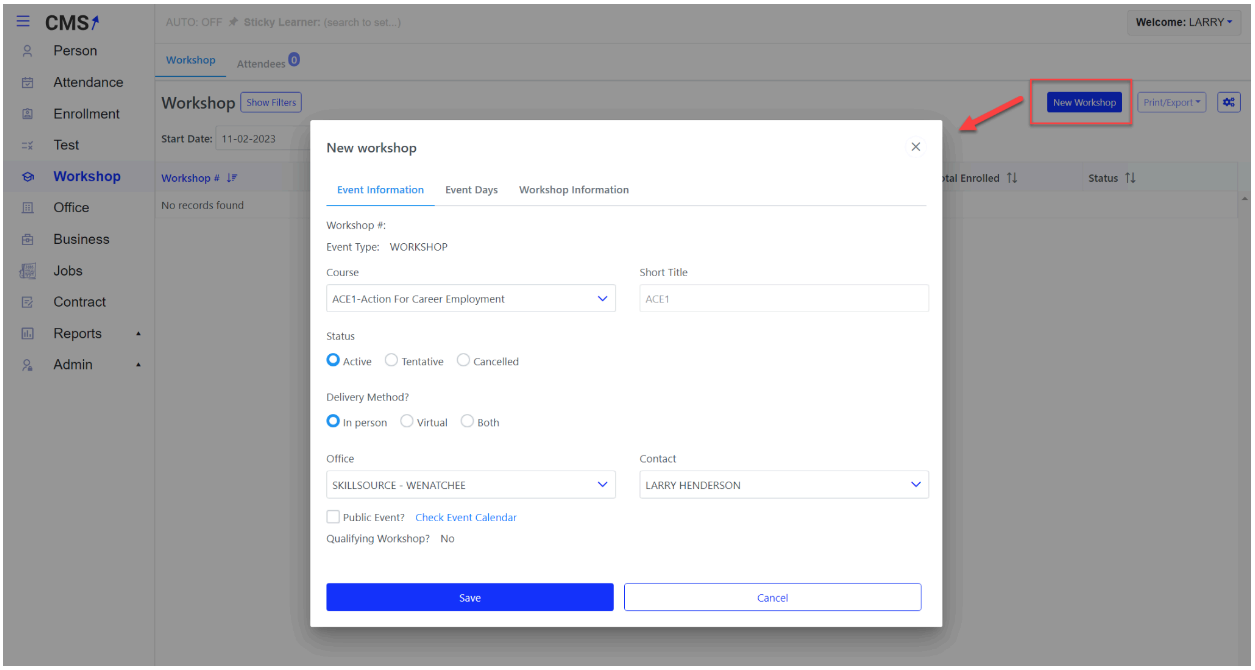
Edit Workshop



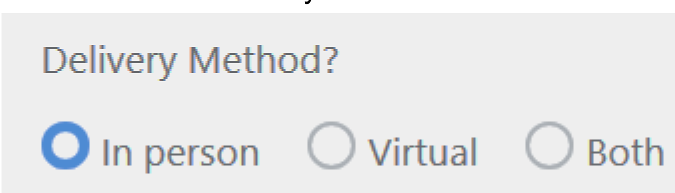
Event Days



Creating a New Workshop

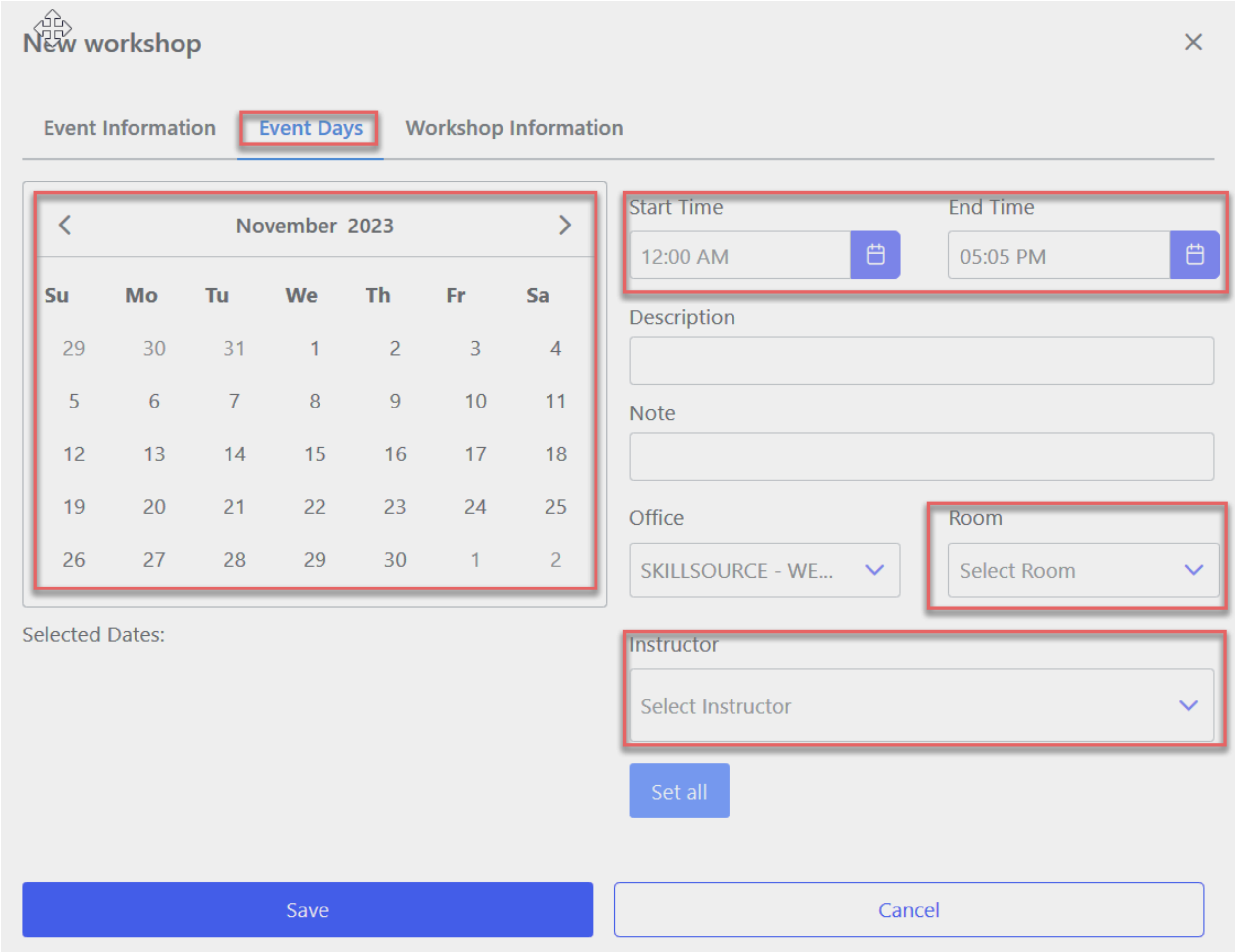


Notice there are 3 tabs to the new Workshop Entry/Edit dialog. The first tab is **Event Information.** The **Course** drop-down list is automatically constrained to only those courses offered by the **Office** shown a little further down. The office shown by default is the office of the logged-in **staff** user. If you select a different office, then the list of courses will change to only those courses offered by that office.



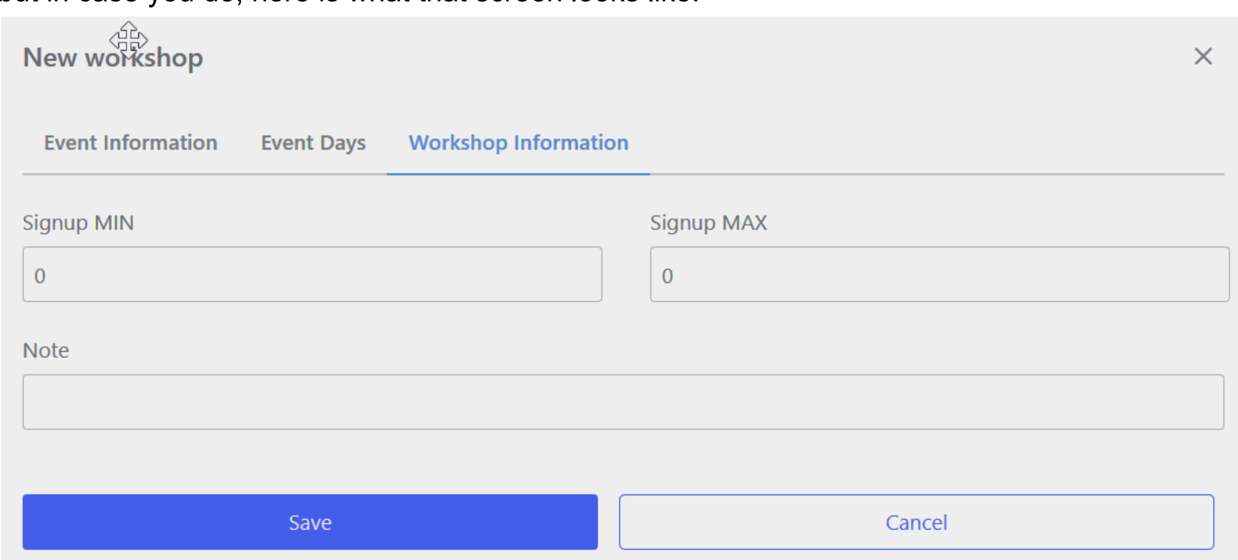
In person is the usual way of delivery. **Virtual** means that the workshop is delivered via Zoom or some other zoom-like online technology. And sometimes a workshop is **both** in person and virtual. If the workshop is either Virtual or Both, then the workshop should be available for participants in all offices.

When you check the **"Public Event?"** box, the workshop will be copied to the appropriate Google calendar automatically. Do not click the **Save** until you have completed the **Event Days** tab.



Be sure to select all the days of the workshop and set the Start Time, End Time, Room and Instructor. If the workshop involves more than one day and the Start Time, End Time, Room and Instructor are the same for each day, just click the **Set All** button. Otherwise, you can customize each day's Start Time, End Time, Room and Instructor.

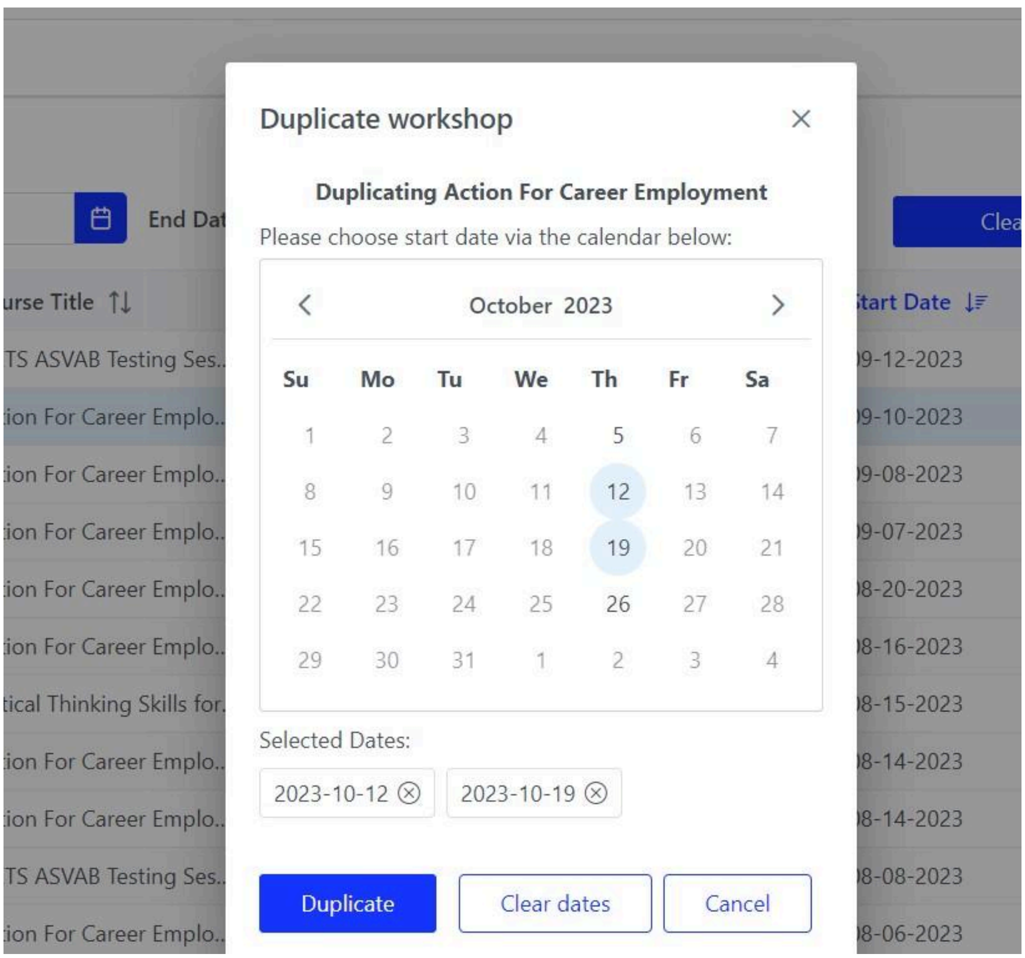
Most times you can click the Save button without going to the final Workshop Information tab, but in case you do, here is what that screen looks like:



Workshop Duplication Feature

1. *The context menu (right click) has an option called "Duplicate"* - an automated way to make an exact copy of the workshop using one or more future start dates. The **user will NOT be allowed to pick a different start day** (of the week) than the start day of the original workshop.
   A. If the workshop is a single day event on a Wednesday, for example, you will only be able to pick Wednesdays in the future to duplicate to. All the other days of the calendar will not be selectable.
   B. If the workshop is a multi-day event on a **Tuesday**, Wednesday and Thursday, for example, then the user will only be able to select **Tuesdays** in the future to duplicate to. You do not need to select each day for the duplicated event. In fact, the other days of the calendar will not even be selectable.

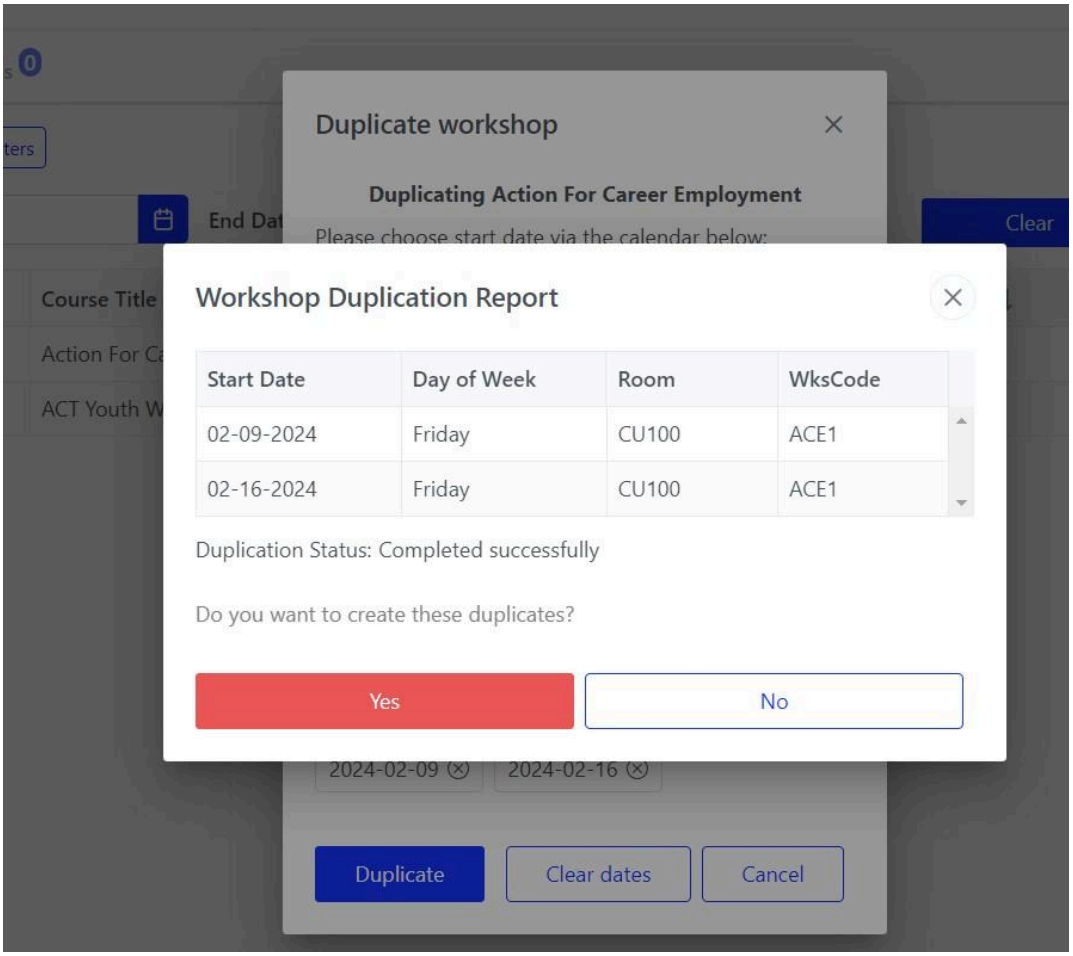
2. *All the data (event and workshop information including "Start Time" and "End Time" fields on the corresponding tabs) is disabled for change during the duplication process.*

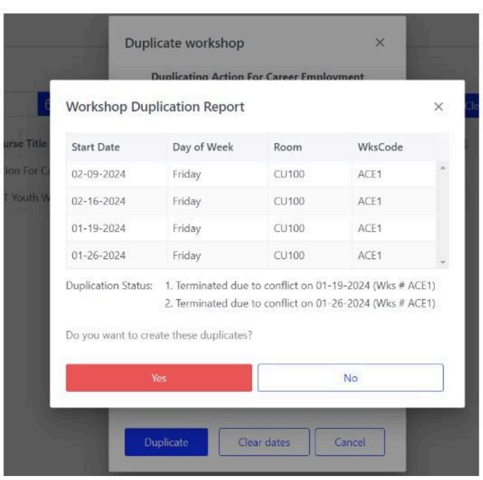


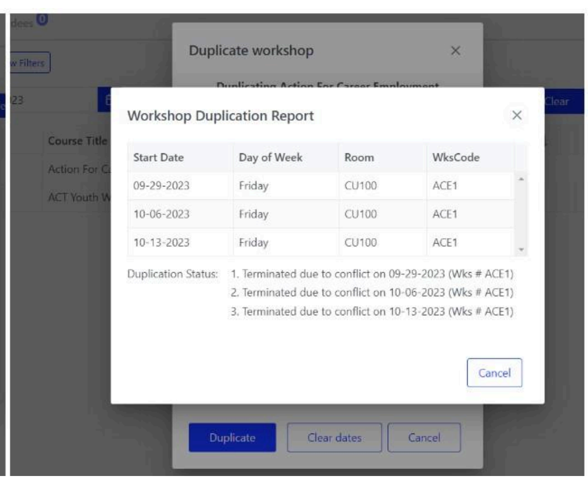
3. *Other days (except start date) are NOT available for selection (the blue selected highlight will not appear) - they might be changed only after such a duplicated workshop record is already completed, namely while editing the process of such record itself.*

4. *Once all the new start dates are selected, the user will be shown a report (displayed as a pop-up notification) of what is about to happen (before it actually happens). This report indicates how many workshops will be created.*

   The report format is as following:





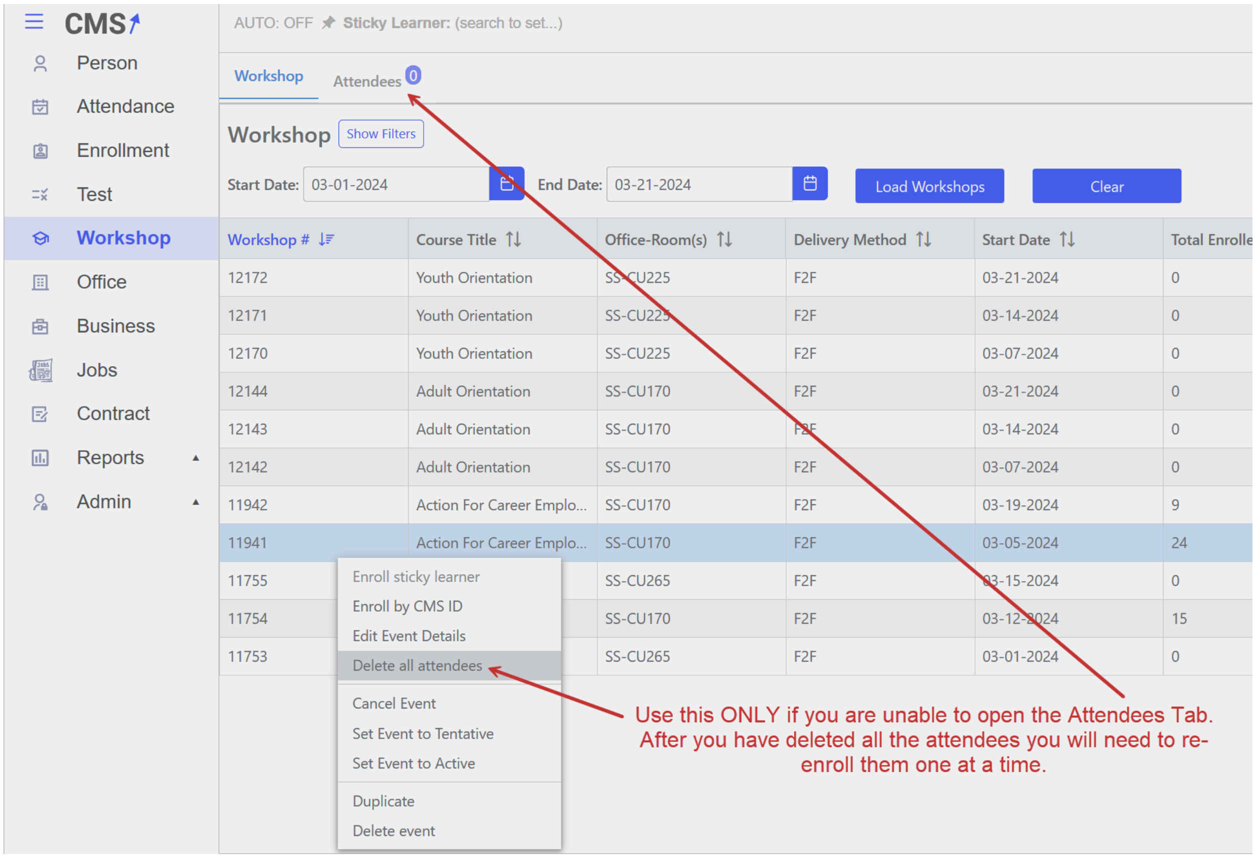


The condition that would disallow the creation of a given duplication instance is if any of the dates/times/rooms for that instance aren't available because another event in the same room has been scheduled for the same. The user should be asked if they would like to create duplications up to the date of first conflict or terminate the whole process. The report will show a conflict date so the user can terminate the duplication process and go back and unselect that date if desired. One common conflict example is when a 3-day ACE workshop from 1 - 4pm Tues, Wed and Thursday conflicts with an Orientation at 1:30 in the same room on Thursday (last day of the workshop). Make sure you schedule such events in a different room.

5. *If a workshop has several different rooms for different days the room for the first workshop day is displayed in the report.*
6. *Each new workshop created by this process will also be reflected in the Google calendar just as it happens when a single workshop is created.*
7. *Updates to the original event (or any event created by duplication) do not cascade to all the other related events. Duplicating an event will create several individual events, and after duplication, a user has to manage each created event individually.*
8. *Deleting the original event has no impact on duplicated events. But deleting individual events involves the same processes that exist now, i.e. corresponding Google calendar events are also deleted.*
9. *The system does NOT allow duplication more than 12 months into the future from the current date when the user is duplicating a workshop record.*
10. *If a future workshop event crosses over a Daylight Savings Time boundary the start and end time should still display correctly, but make sure you check it.*
11. *The system does NOT allow duplicating workshop records older than a month, so* a “Duplicate” context menu option is NOT displayed for past workshop records older than a month.

Issue Resolution: Deleting all Attendees

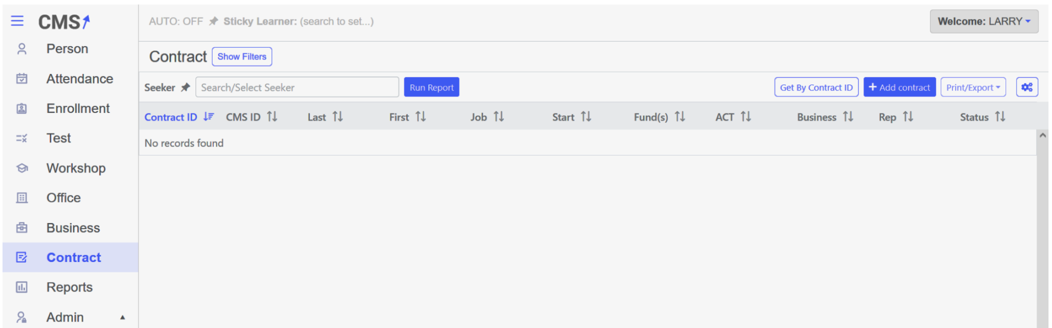
If you cannot open the Attendees Tab there is a right-click menu option on a workshop row as shown below:



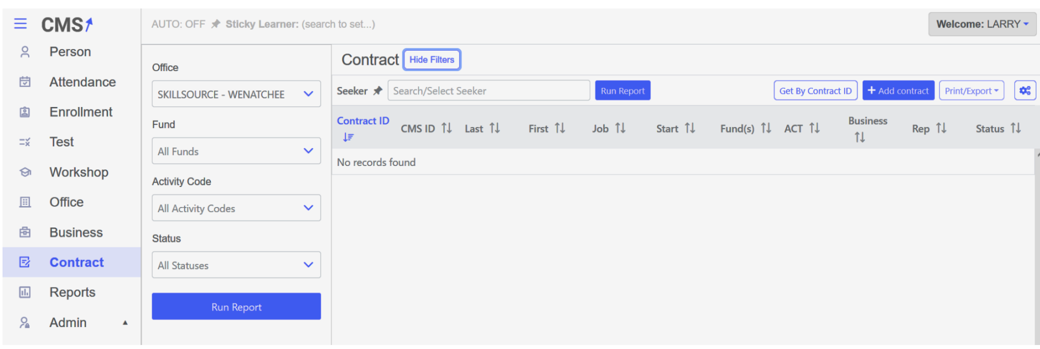
When you click on a row, the Attendees tab should become enabled showing the number enrolled. The reason the image above is showing 0 instead of 24 on the Attendees tab is because I failed to actually left-click on the row. I did a right-click to get the context menu to appear. So nothing is actually wrong with this workshop and it would be a serious mistake to Delete all attendees. **Use this feature ONLY if you are unable to open the Attendees tab**.

Contracts

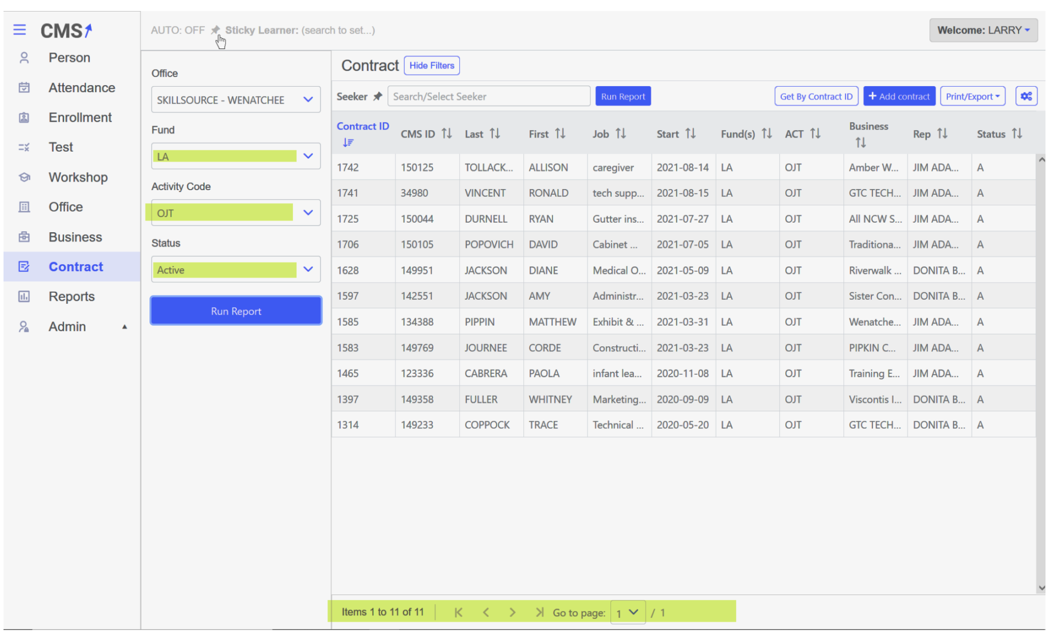
Finding Contracts



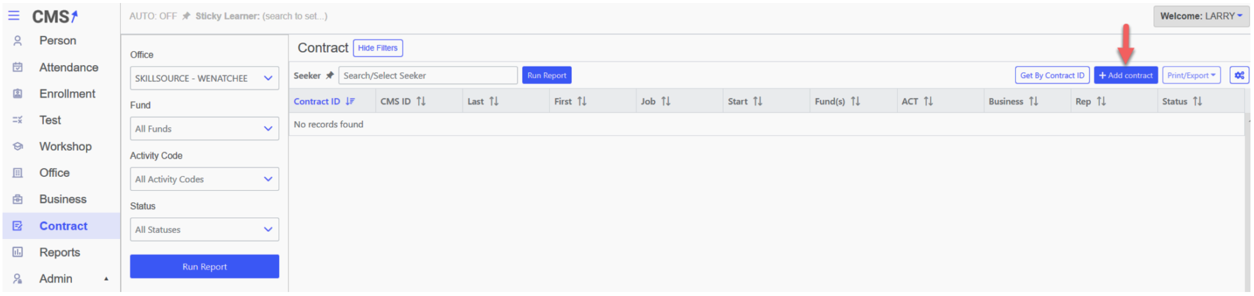
By clicking the **Show Filters** button the following sidebar appears:



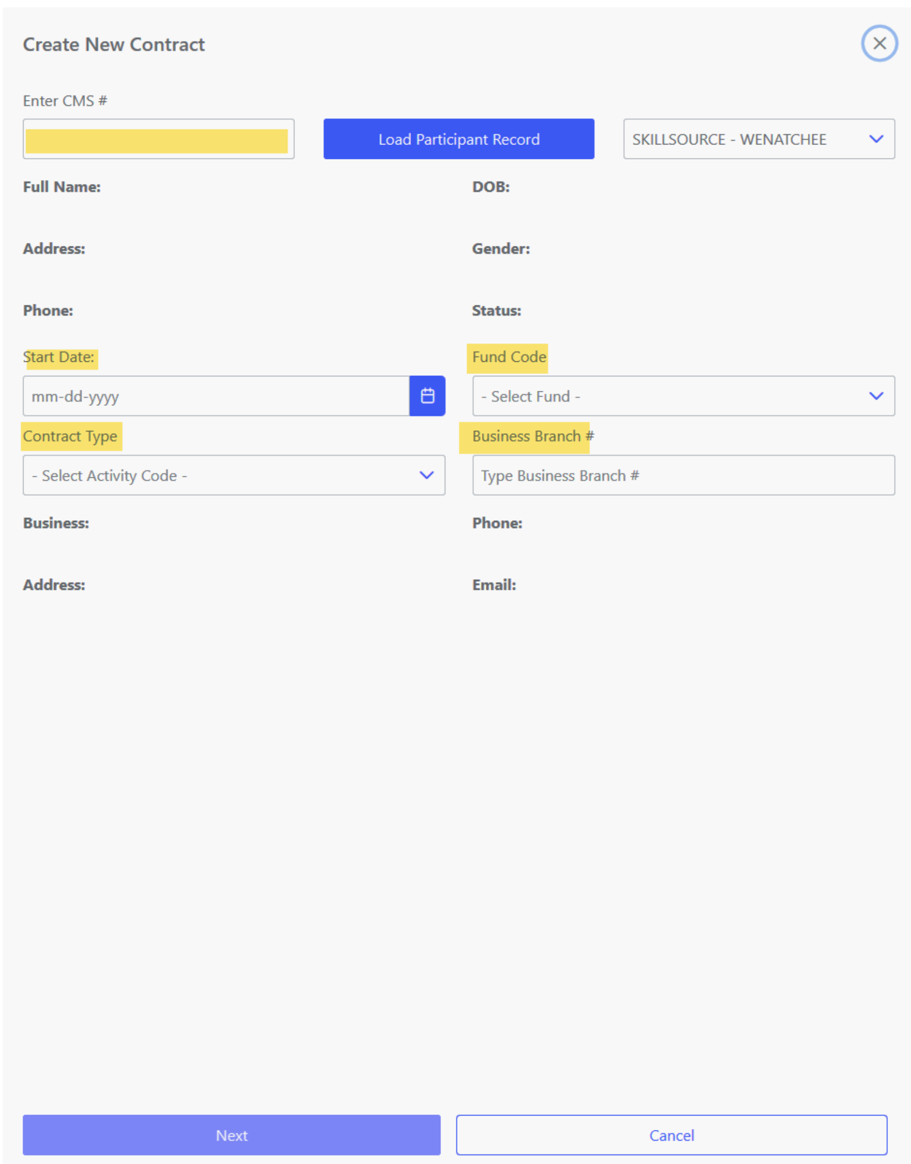
I want to search for all LA OJT’s that have an Active status:



New Contract Wizard

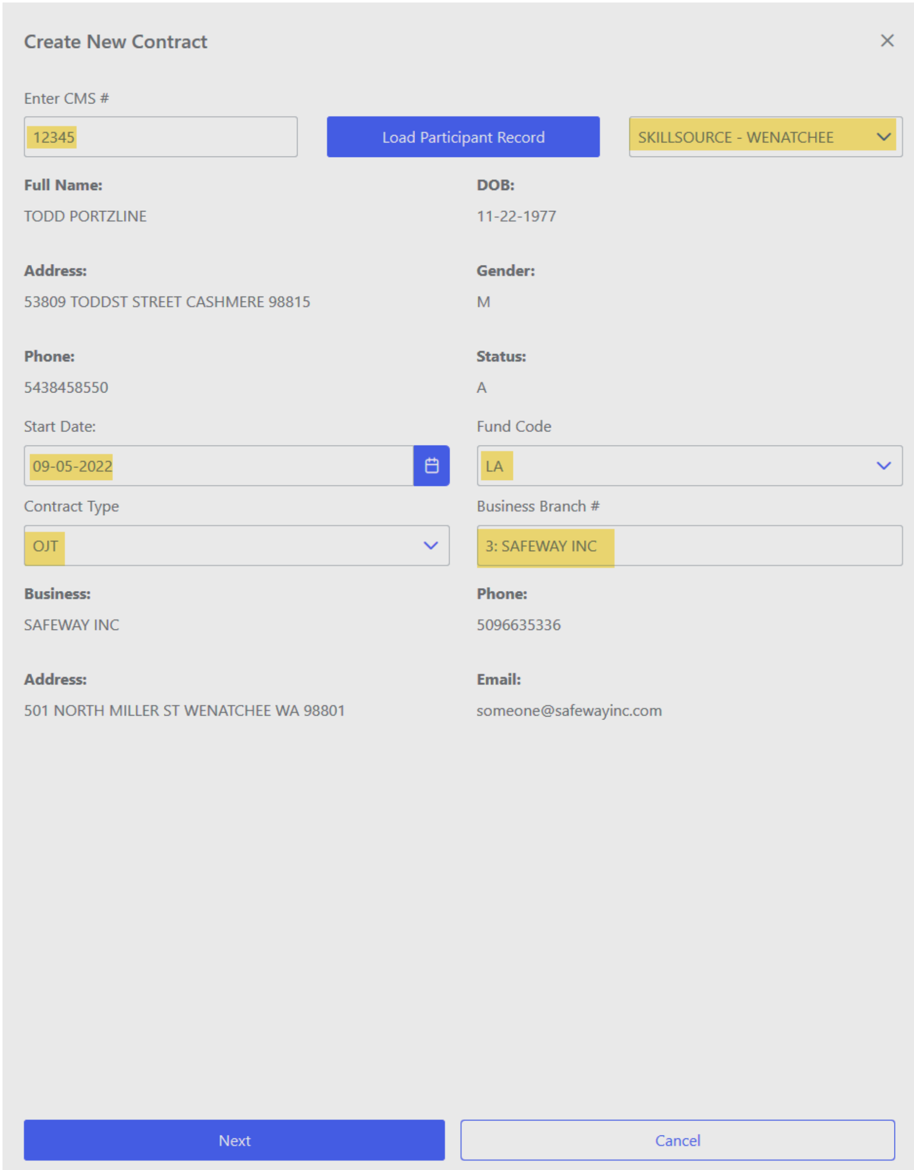


This screen provides search filters for producing a list of contracts, The red arrow points to the button you click when starting a new contract. When clicked the following screen will appear:



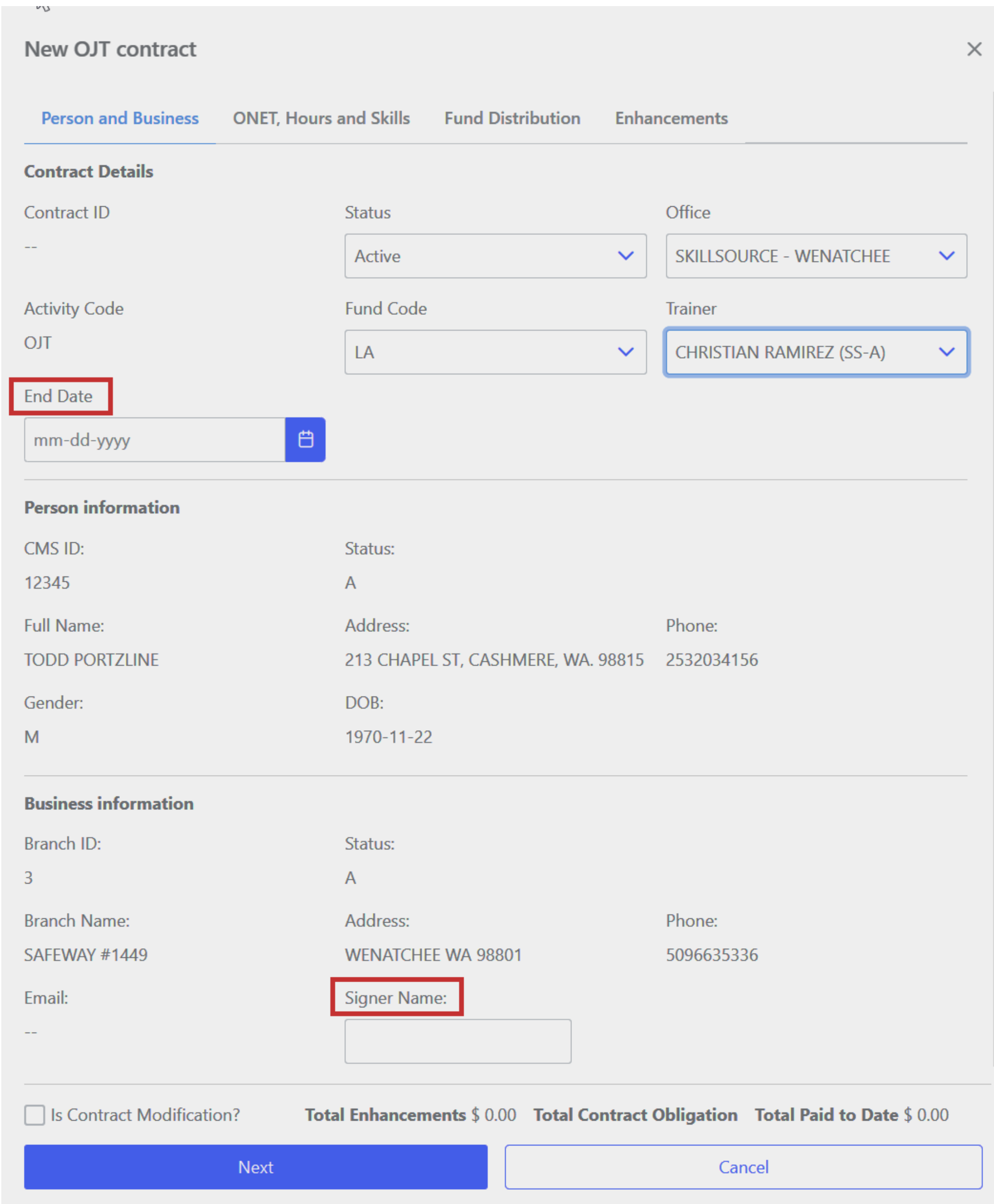
Most contracts require a real participant cmsID# to begin. The one exception is the IWT contract. We are using cmsID# **1** for all IWT contracts. The Full Name will read **IWT Business.**

This is the same screen which starts the new contract wizard, but with actual selections made.

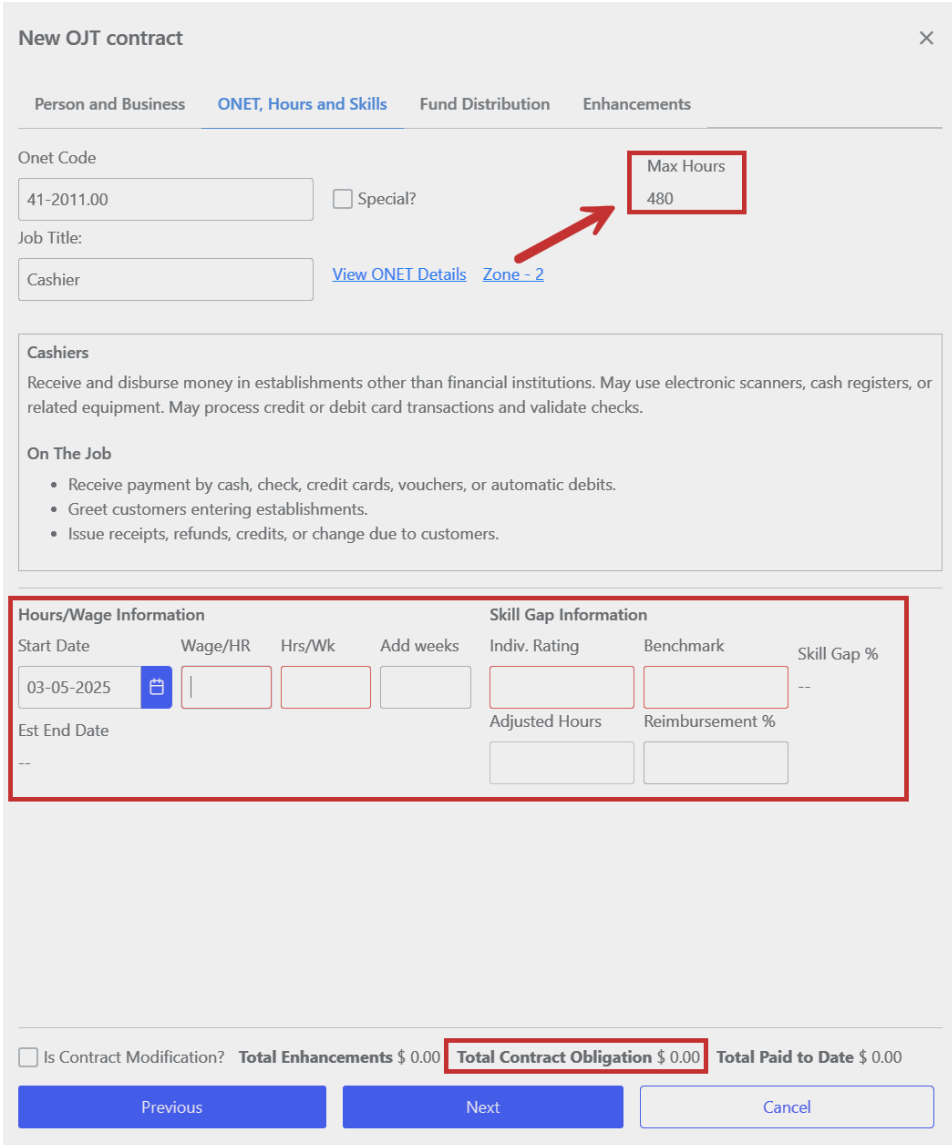


Click Next to continue to the second step of contract creation. The next steps are driven by the selected Contract Type above.

This screen is mostly for verifying that the selected entities are correct. There is also a field for typing in the supervisor's name. **This verification step is very important, because for some of these elements (e.g. Activity Code) you cannot change them after the contract has been created. Be sure to enter the End Date (estimated end date).**



Verify that all the information is correct before clicking next.

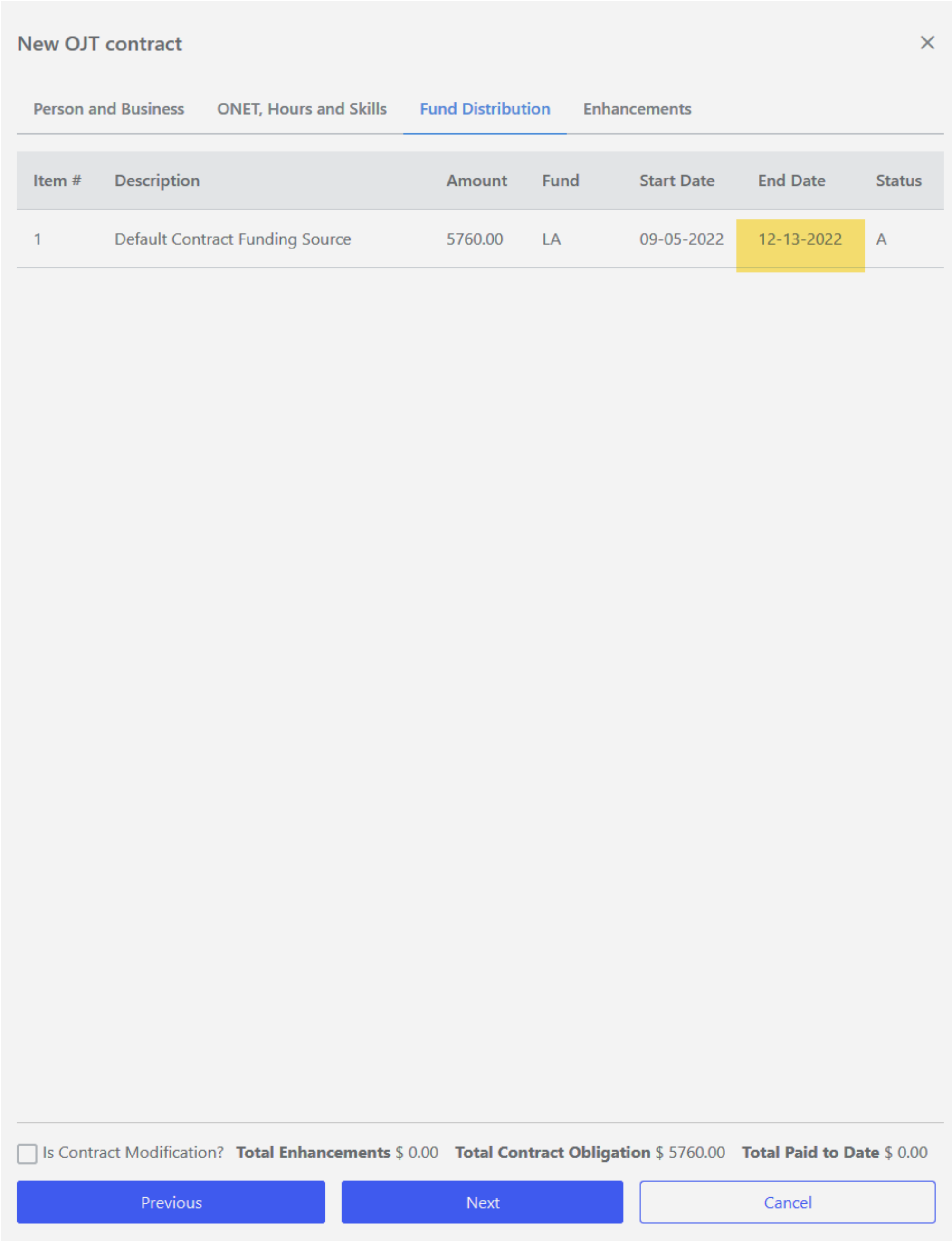


<u>How Total Contract Obligation is Calculated</u>

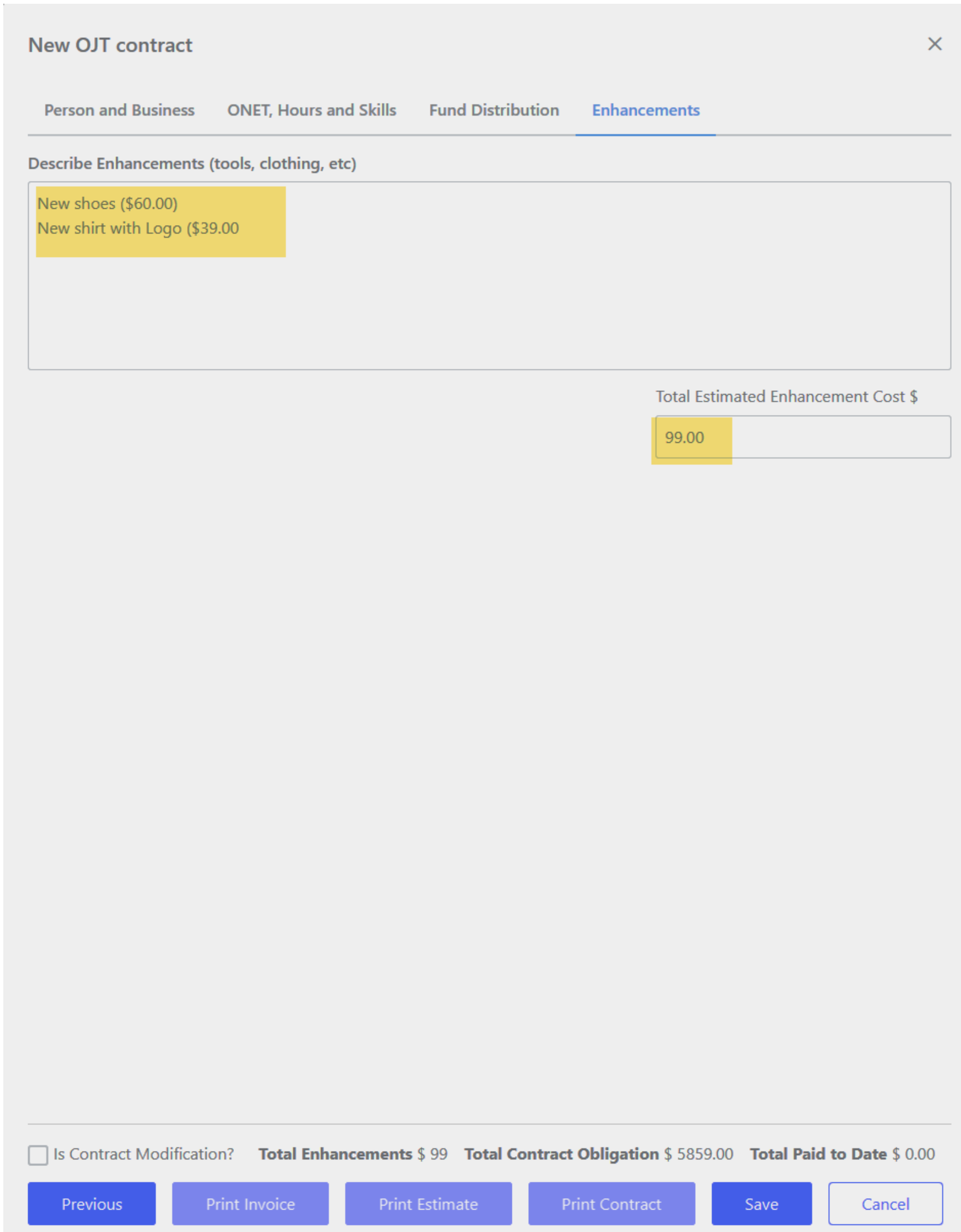
1. The Max Hours value is drawn from the Zone level of the selected ONET code.
2. The Wage/HR, Hrs/Wk, Indiv.Rating and Benchmark fields are required.
3. The Skill Gap % is calculated from the Indiv. Rating and Benchmark values.
4. The Adjusted Hours value comes from Max Hours x Skill Gap%
5. The Total Contract Obligation is calculated using the following formula:

Wage/Hr x Adjusted Hours x Reimbursement% + Total Enhancements

Note: As you finish entering the required values you should see the **Total Contract Obligation** value. If the Total Contract Obligation still shows $0.00, click back into the **Wage/Hr** field and tab through the fields again. This is an intermittent bug that we are trying to fix.

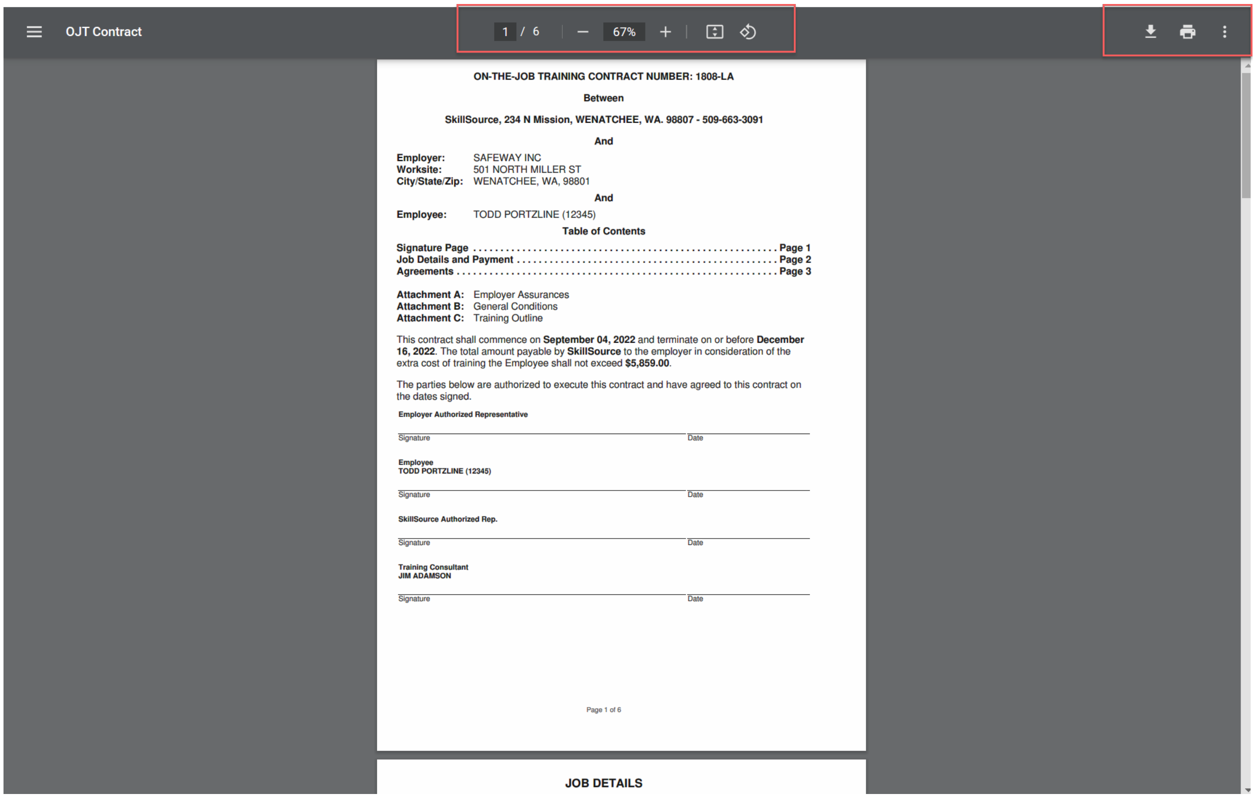


Enter the end date and then click Next.

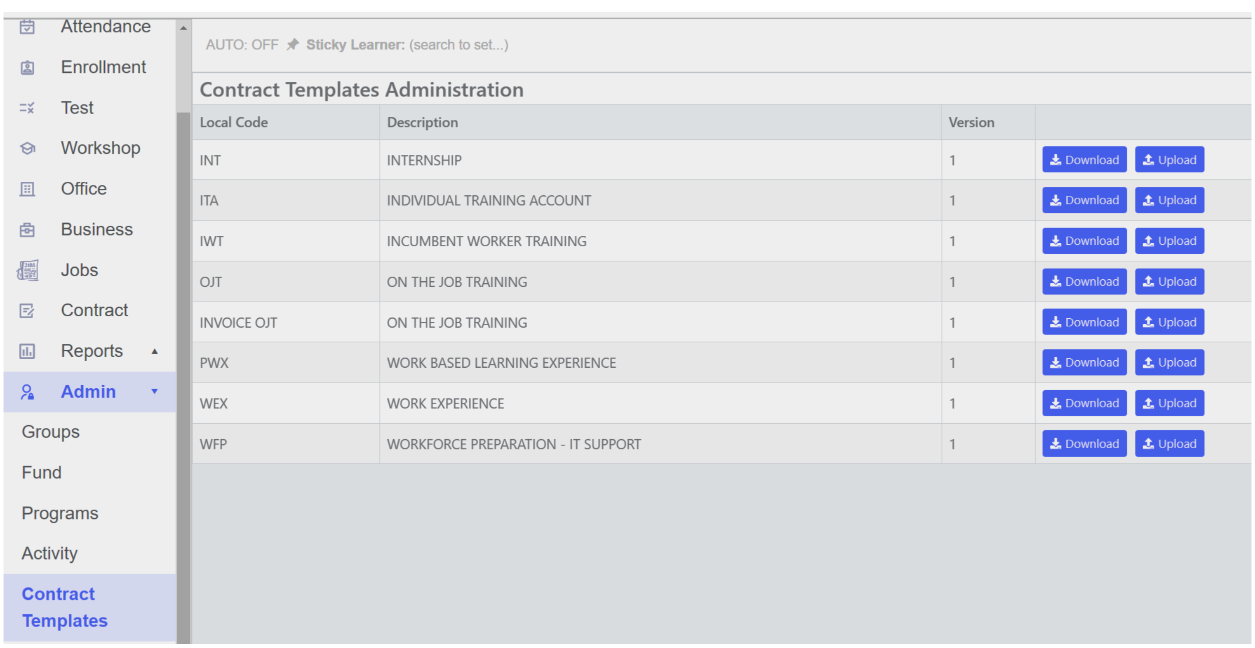


If this is an OJT, you must click save before you can print the contract.

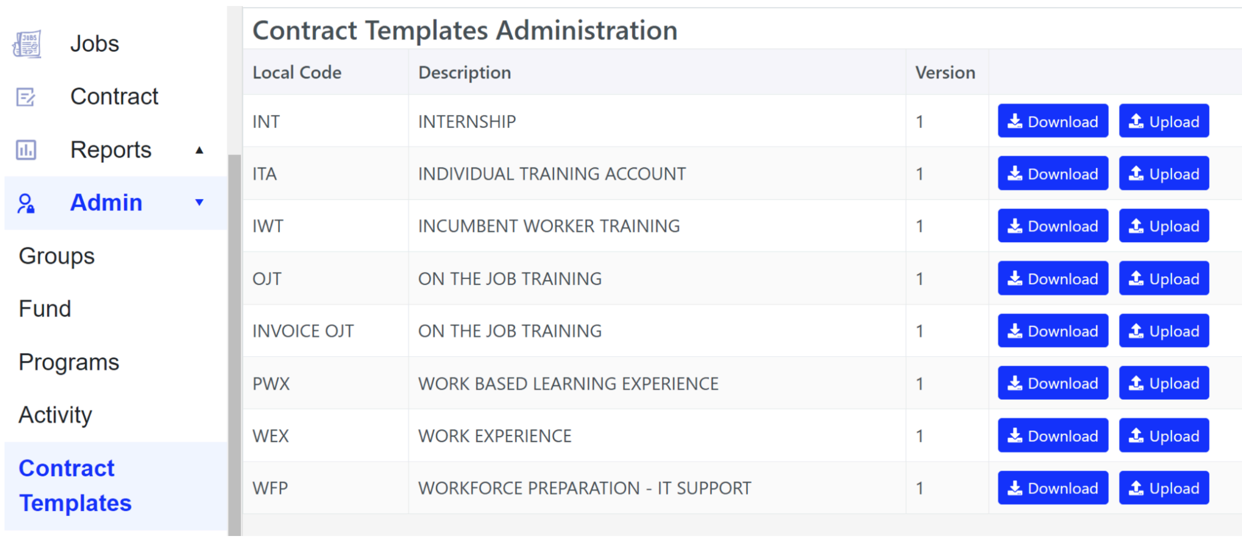
Contract Printing



Some sections of the boilerplate can be edited using an admin function called "Contract Templates"



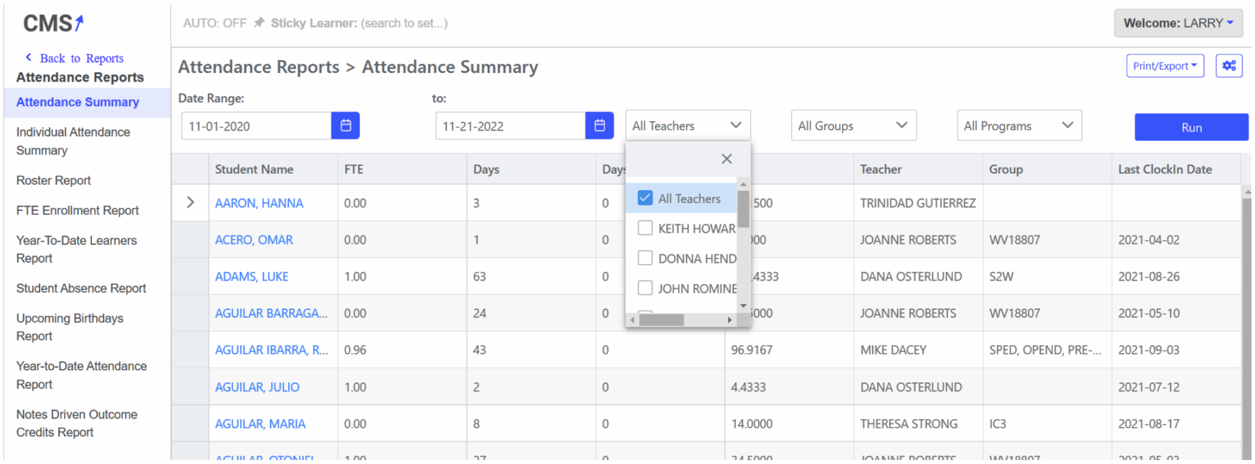
Contract Template Editing



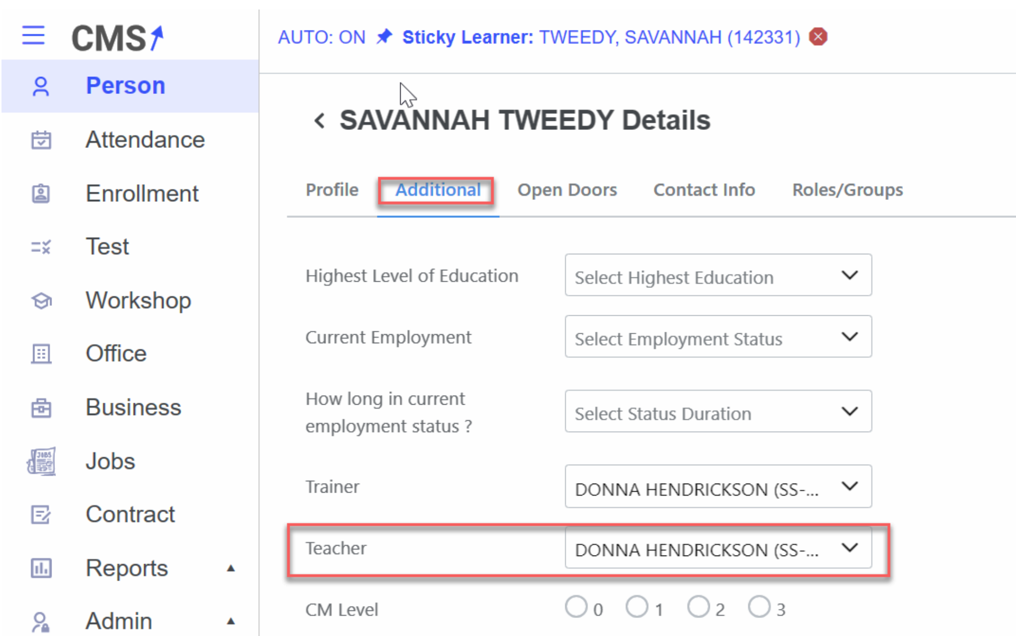
This is an Admin only function. Clicking the Download button will download the HTML document holding the text of the selected contract type. The person doing this updating needs to know the basics of HTML but does not need to be an HTML developer. When finished making the edits, the Upload button will enable you to send it back to the server.

Reports

Attendance Summary Report



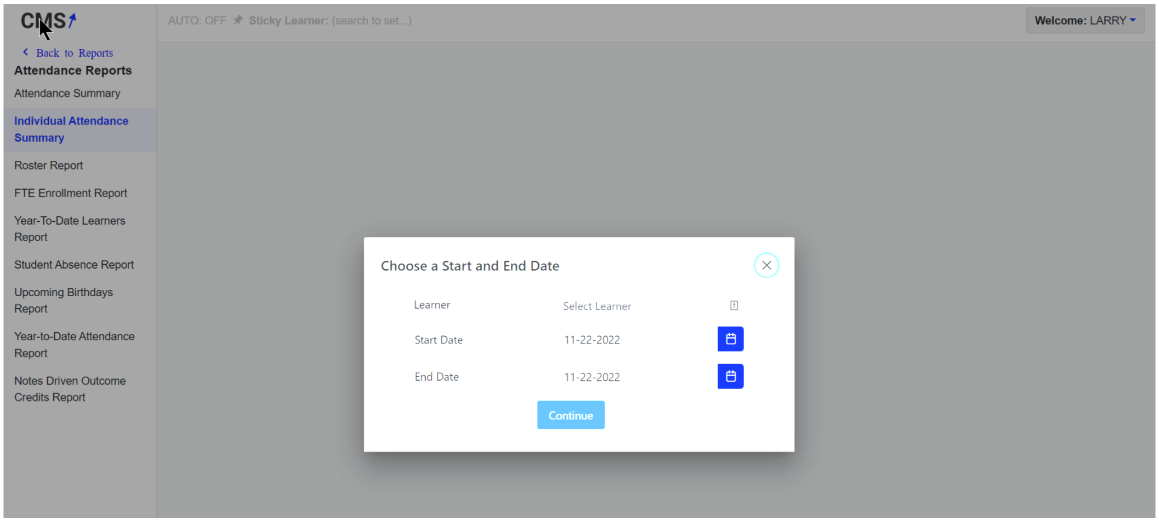
This report allows you to query the attendance records using any combination of selection criteria. The date range is required while **Teachers, Groups and Programs** are optional. The drop-down selection lists are multi-select, as you can see from the screen shot above. If the user selects Donna Hendrickson, then the report will be constrained to those students who attended in the date range and had Donna as their primary teacher. A learner's ***primary teacher*** is the Teacher that is indicated in the **Additional Information** portion of the learner's profile.



The Groups and Programs drop-downs present options having to do with the data in the Roles/Groups tab in the screenshot above.

Also remember that you can easily add/remove columns and sort the data by clicking on a column header. Click again and it will sort the opposite way.

The Individual Attendance Summary



This is the same report that you can get when you right-click on a person's record in the main results grid and select Individual Attendance Report. If you have a "sticky learner" set, then that learner will be displayed in the Learner field. If not, you can enter any part of the learners name and find them that way. For the Start Date you can set it back 24 months to capture all the attendance records since then.

Individual Attendance Report for ERIK CARRANZA TELLEZ JR (151456)

Report date: 09/01/2023 10:43 PM
Selected Date Range: 09-01-2022 to 09-01-2023

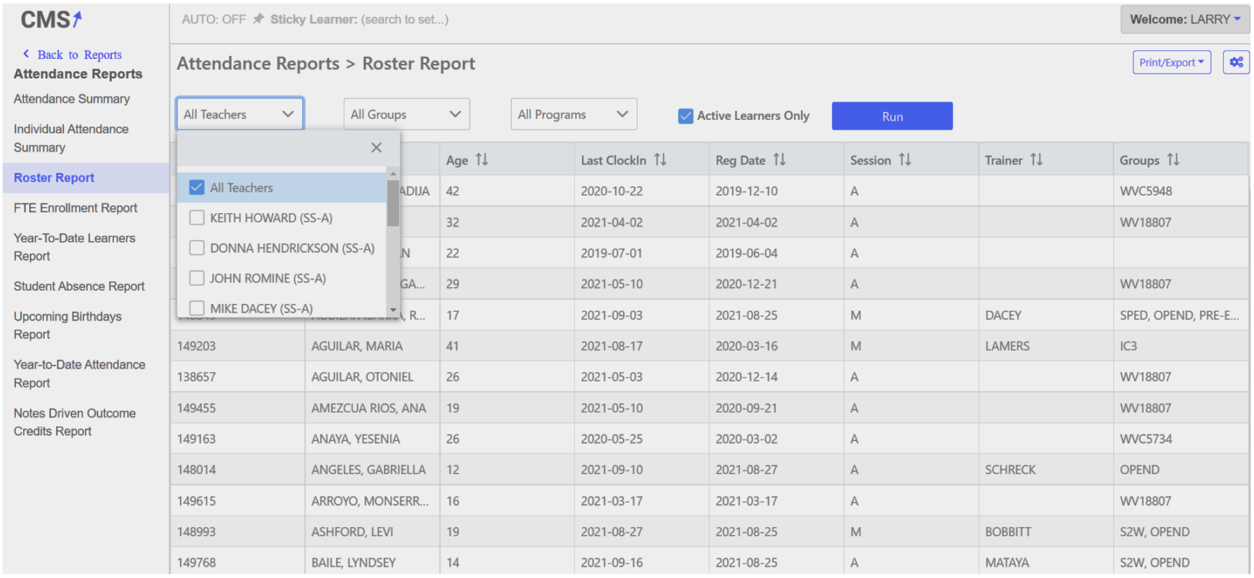
Attendance Summary

ID	Student Name	Days	% of 262	Hours	HW	Teacher	Program
151456	CARRANZA TELLEZ JR, ERIK	58	22.14	125.6833	0	MIKE DACEY	WENSD

Daily Attendance

Date	Hours (h.%)	Groups	Contact Type	Purpose	Note
Wed 01-11-2023	3.00	SPED, OPEND	Face To Face	Instruction	New Student Workshop
Thu 01-12-2023	3.00	SPED, OPEND	Face To Face	Instruction	New Student Workshop
Fri 01-13-2023	3.00	SPED, OPEND	Face To Face	Instruction	New Student Workshop
Thu 01-19-2023	2.88	SPED, OPEND	Face To Face	instruction	
Tue 01-24-2023	2.33	SPED, OPEND	Face To Face	instruction	
Wed 01-25-2023	2.25	SPED, OPEND	Face To Face	instruction	

Roster Report



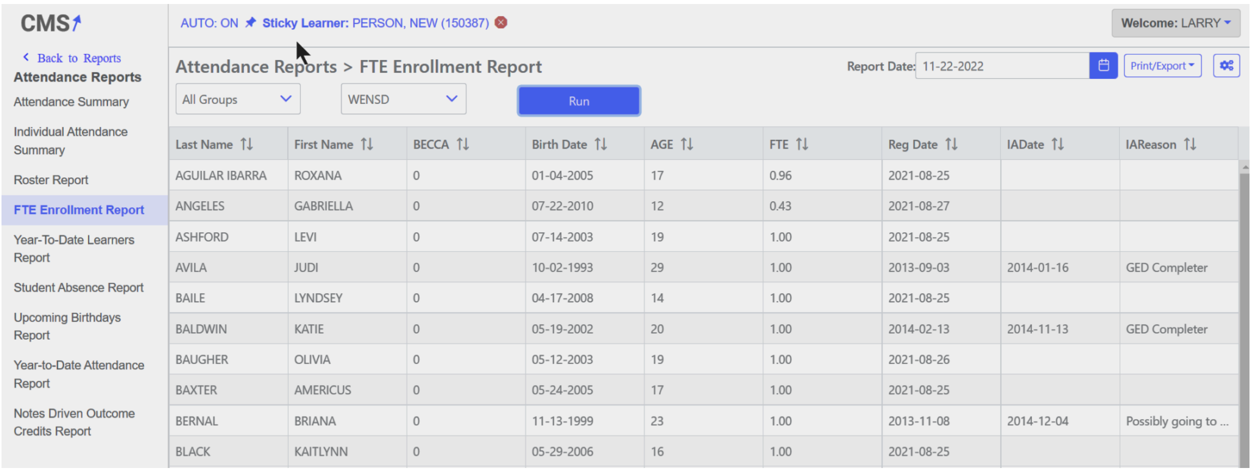
This report depends on some “hidden” requirements that you must know in order to understand why certain students are **not** appearing on the Roster.   I will list the more obvious first.

1. The student is not associated with the Teacher you have selected.
2. The student is not part of the Group you have selected.
3. The student is not in the Program you have selected.

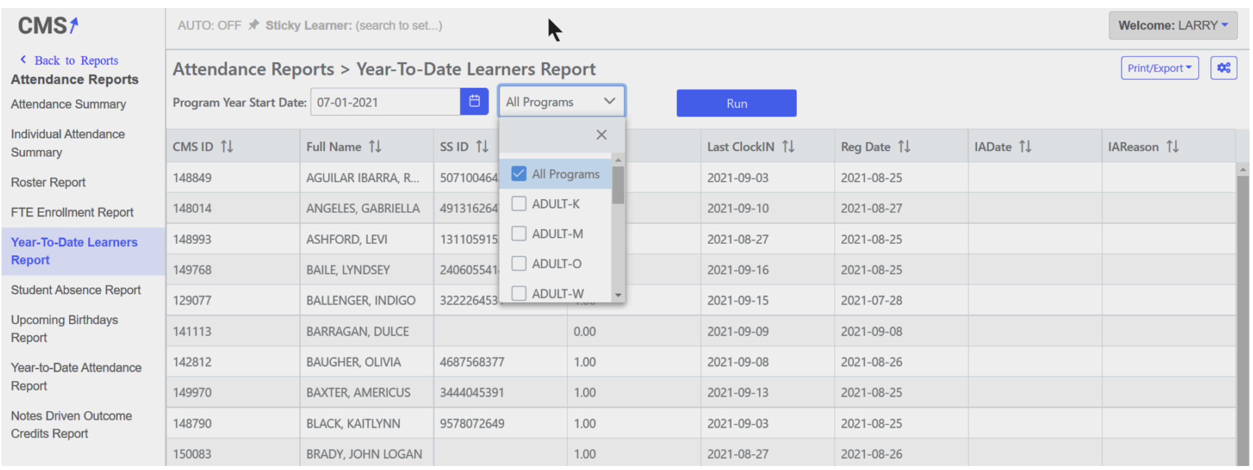
The less obvious are as follows:

1. The student MUST have at least one attendance record **on or after** the Registration Date indicated in the Additional Information tab of the student profile
2. The student must have an Active Learner role **in your office**..
3. The student must be associated with at least one active Program.

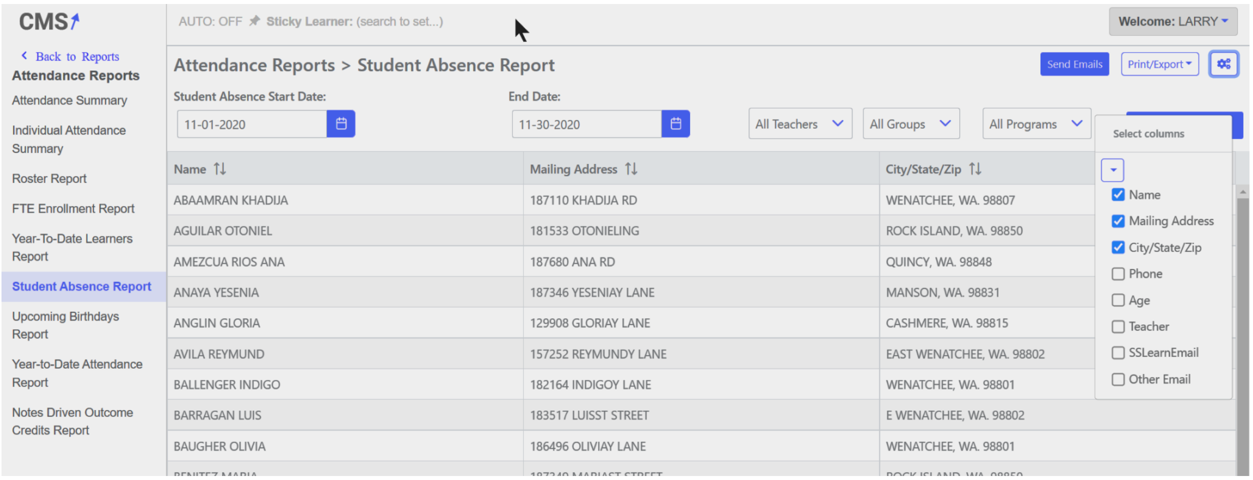
FTE Enrollment Report



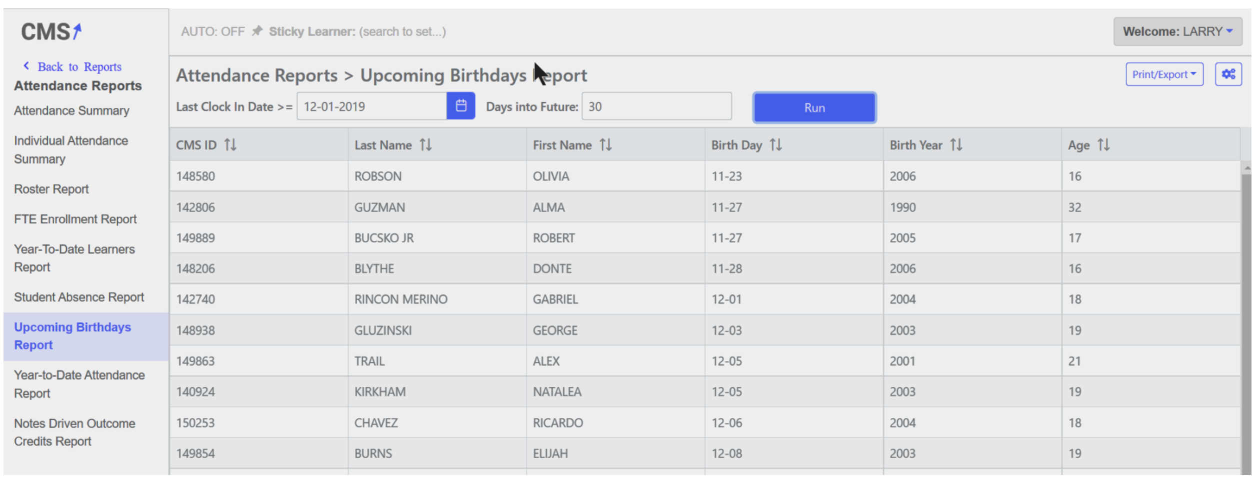
Year-To-Date Learners Report



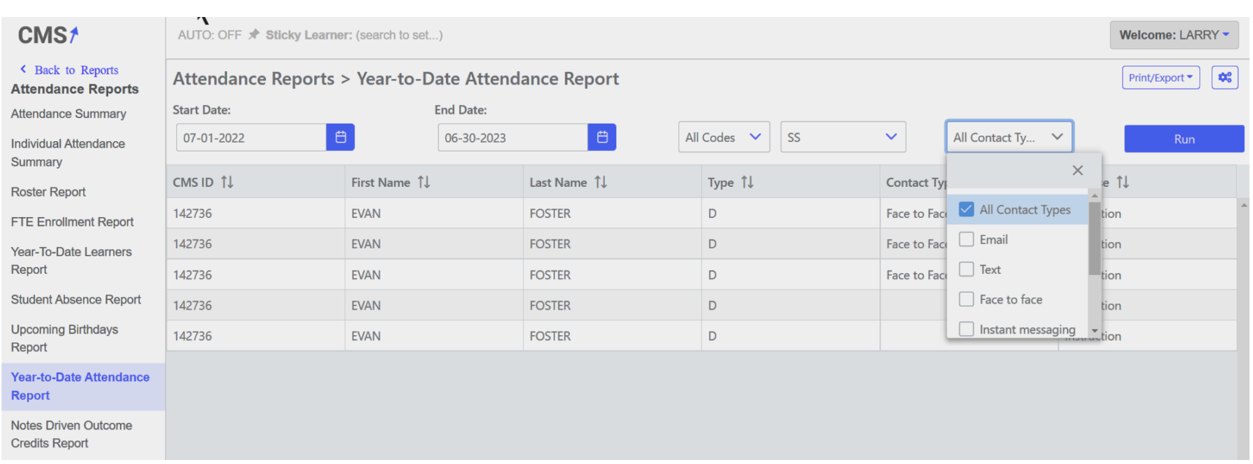
Student Absence Report



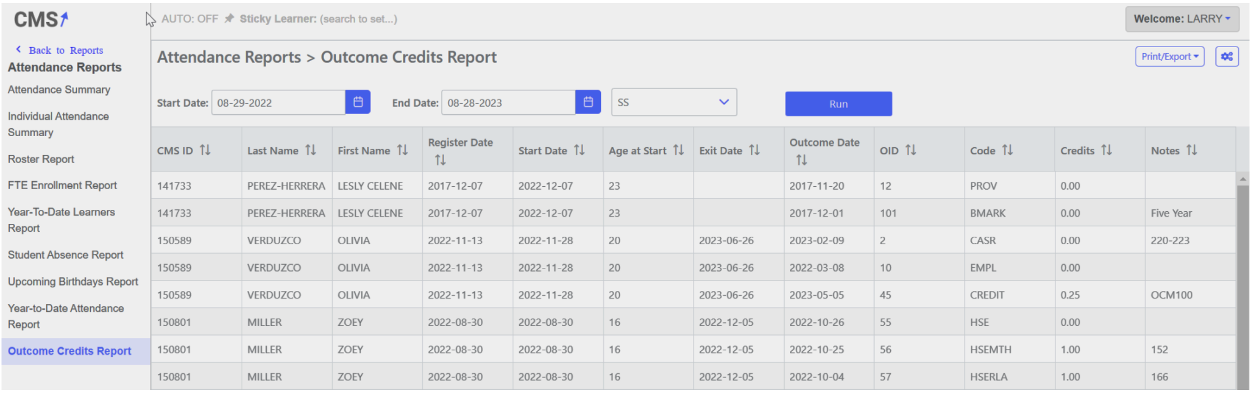
Upcoming Birthdays Report



I ran the report above on 11/22/2022



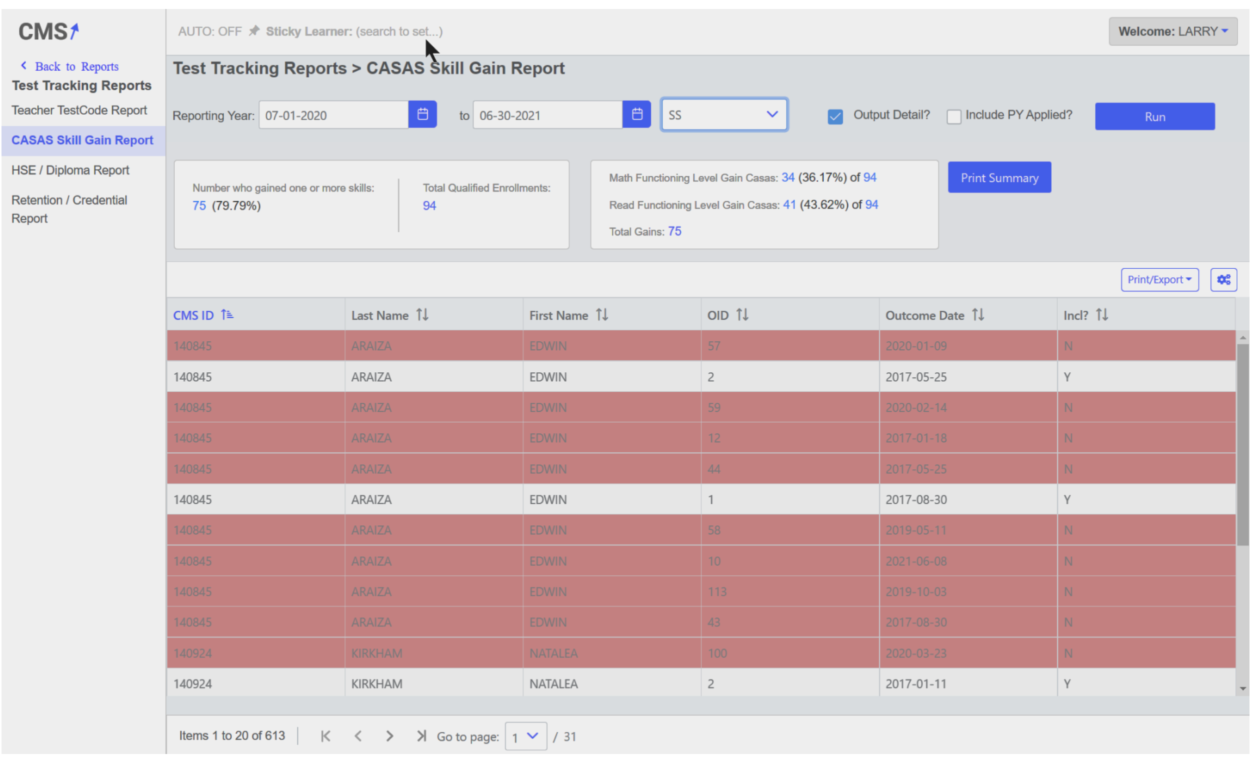
Outcome Credits Report



CMS ID	Last Name	First Name	Register Date	Start Date	Age at Start	Exit Date	Outcome Date	OID	Code	Credits	Notes
141733	PEREZ-HERRERA	LESLY CELENE	2017-12-07	2022-12-07	23		2017-11-20	12	PROV	0.00	
141733	PEREZ-HERRERA	LESLY CELENE	2017-12-07	2022-12-07	23		2017-12-01	101	BMARK	0.00	Five Year
150589	VERDUZCO	OLIVIA	2022-11-13	2022-11-28	20	2023-06-26	2023-02-09	2	CASR	0.00	220-223
150589	VERDUZCO	OLIVIA	2022-11-13	2022-11-28	20	2023-06-26	2022-03-08	10	EMPL	0.00	
150589	VERDUZCO	OLIVIA	2022-11-13	2022-11-28	20	2023-06-26	2023-05-05	45	CREDIT	0.25	OCM100
150801	MILLER	ZOEY	2022-08-30	2022-08-30	16	2022-12-05	2022-10-26	55	HSE	0.00	
150801	MILLER	ZOEY	2022-08-30	2022-08-30	16	2022-12-05	2022-10-25	56	HSEMTH	1.00	152
150801	MILLER	ZOEY	2022-08-30	2022-08-30	16	2022-12-05	2022-10-04	57	HSERLA	1.00	166

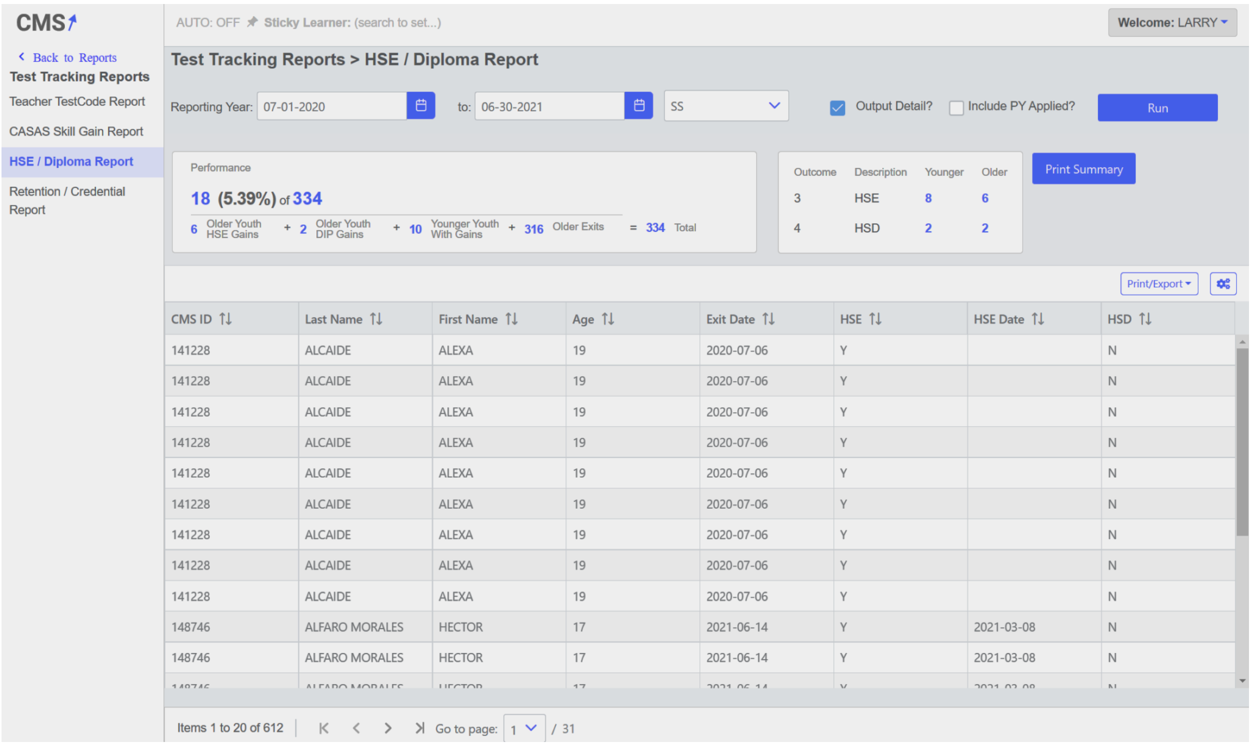
This report produces the raw data from the Open Doors program, and can be run anytime during the year.

CASAS Skill Gain Report

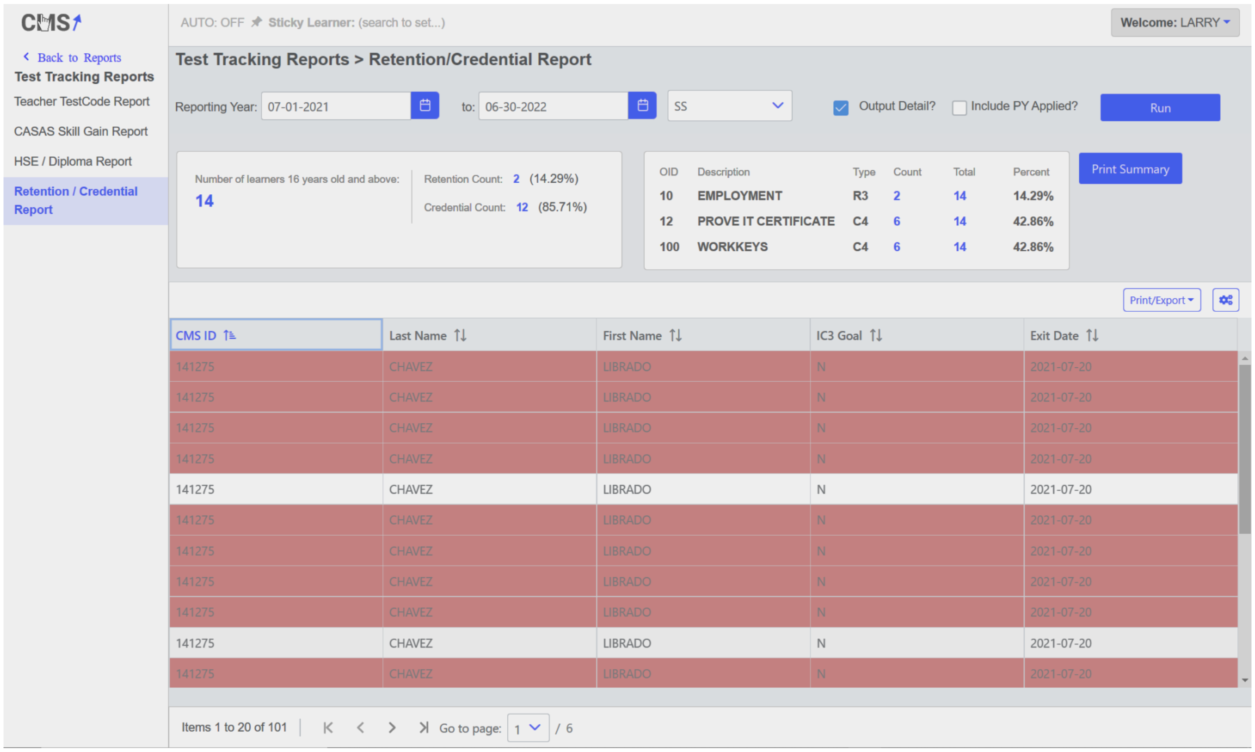


CMS ID	Last Name	First Name	OID	Outcome Date	Incl?
140845	ARAIZA	EDWIN	57	2020-01-09	N
140845	ARAIZA	EDWIN	2	2017-05-25	Y
140845	ARAIZA	EDWIN	59	2020-02-14	N
140845	ARAIZA	EDWIN	12	2017-01-18	N
140845	ARAIZA	EDWIN	44	2017-05-25	N
140845	ARAIZA	EDWIN	1	2017-08-30	Y
140845	ARAIZA	EDWIN	58	2019-05-11	N
140845	ARAIZA	EDWIN	10	2021-06-08	N
140845	ARAIZA	EDWIN	113	2019-10-03	N
140845	ARAIZA	EDWIN	43	2017-08-30	N
140924	KIRKHAM	NATALEA	100	2020-03-23	N
140924	KIRKHAM	NATALEA	2	2017-01-11	Y

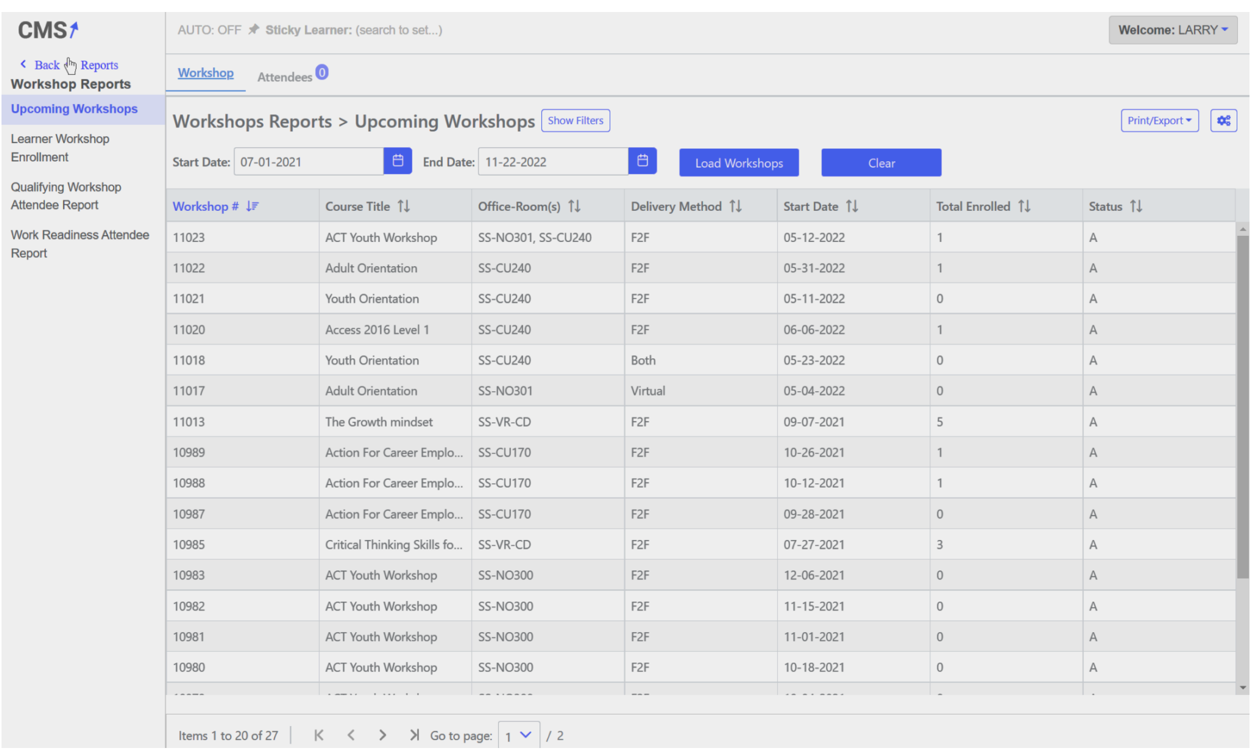
HSE/Diploma Report



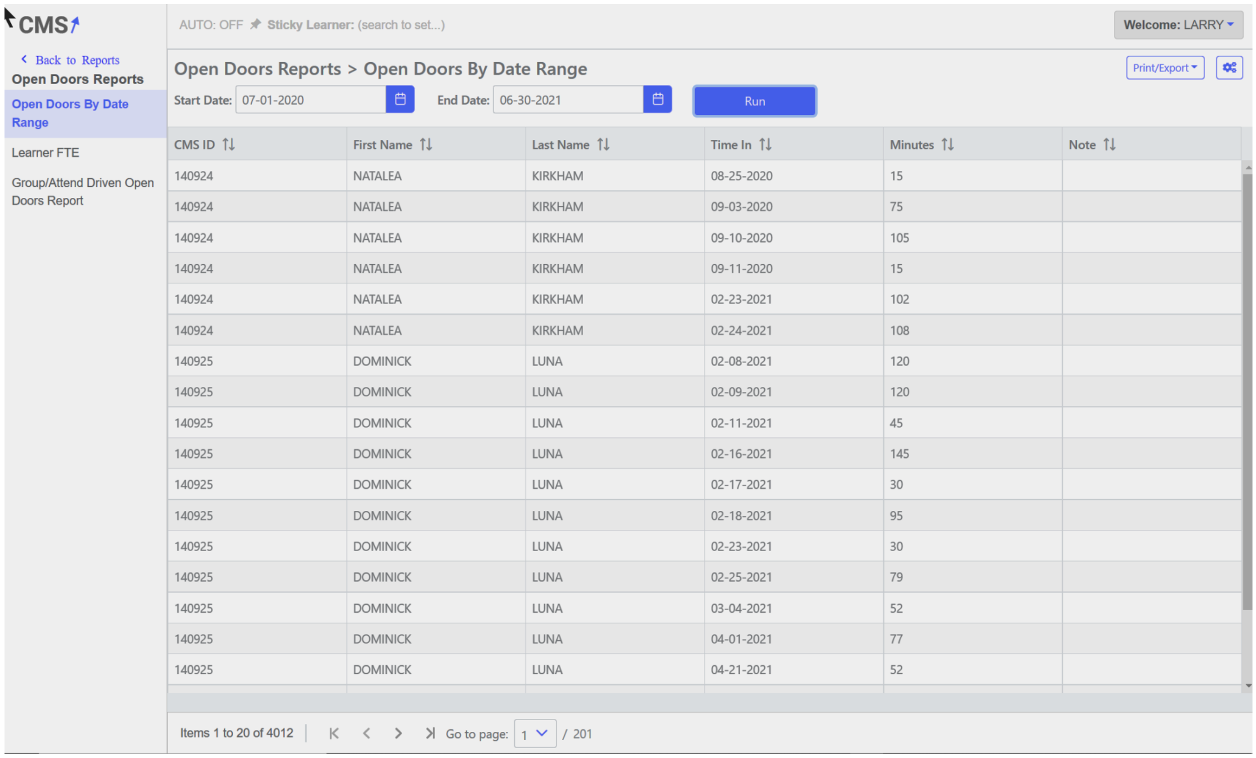
Retention/Credential Report



Upcoming Workshops Report

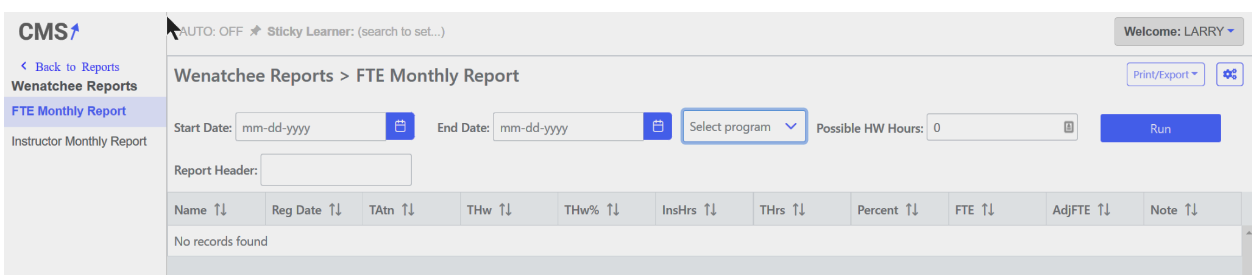


Open Doors By Date Range Report



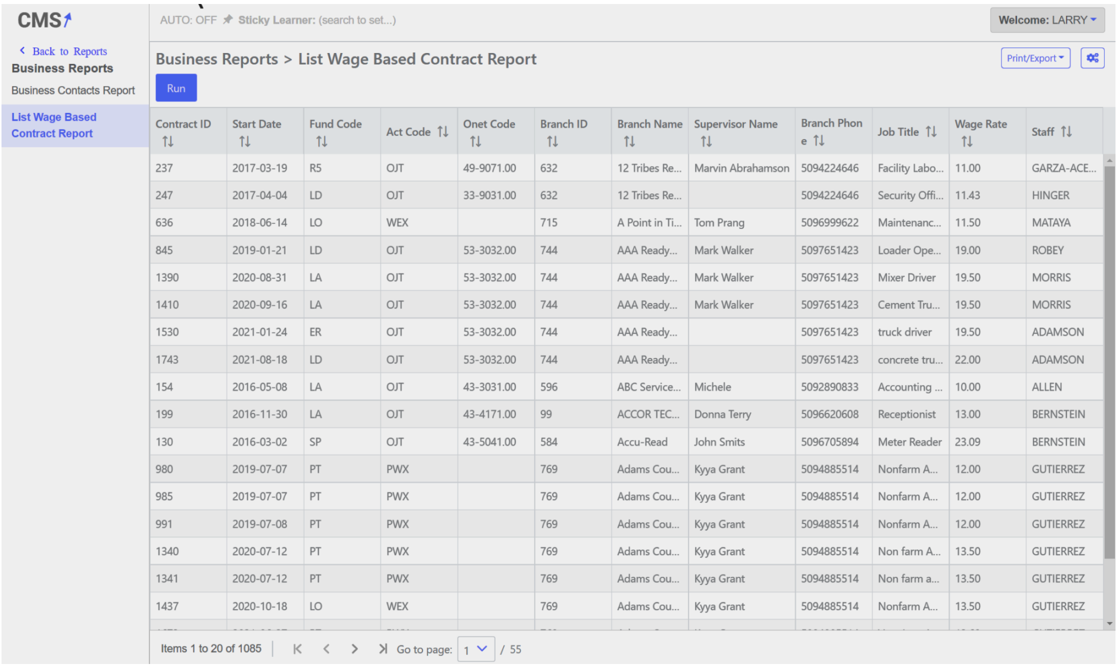
CMS ID	First Name	Last Name	Time In	Minutes	Note
140924	NATALEA	KIRKHAM	08-25-2020	15	
140924	NATALEA	KIRKHAM	09-03-2020	75	
140924	NATALEA	KIRKHAM	09-10-2020	105	
140924	NATALEA	KIRKHAM	09-11-2020	15	
140924	NATALEA	KIRKHAM	02-23-2021	102	
140924	NATALEA	KIRKHAM	02-24-2021	108	
140925	DOMINICK	LUNA	02-08-2021	120	
140925	DOMINICK	LUNA	02-09-2021	120	
140925	DOMINICK	LUNA	02-11-2021	45	
140925	DOMINICK	LUNA	02-16-2021	145	
140925	DOMINICK	LUNA	02-17-2021	30	
140925	DOMINICK	LUNA	02-18-2021	95	
140925	DOMINICK	LUNA	02-23-2021	30	
140925	DOMINICK	LUNA	02-25-2021	79	
140925	DOMINICK	LUNA	03-04-2021	52	
140925	DOMINICK	LUNA	04-01-2021	77	
140925	DOMINICK	LUNA	04-21-2021	52	

FTE Monthly Report



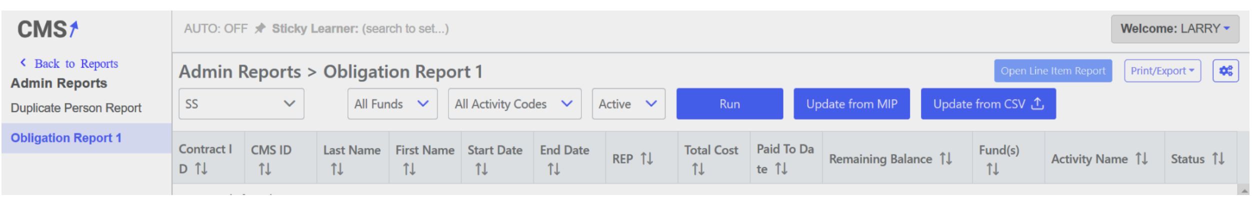
Name	Reg Date	TAtn	THw	THw%	InsHrs	THrs	Percent	FTE	AdjFTE	Note
No records found										

Wage-Based Contracts Report

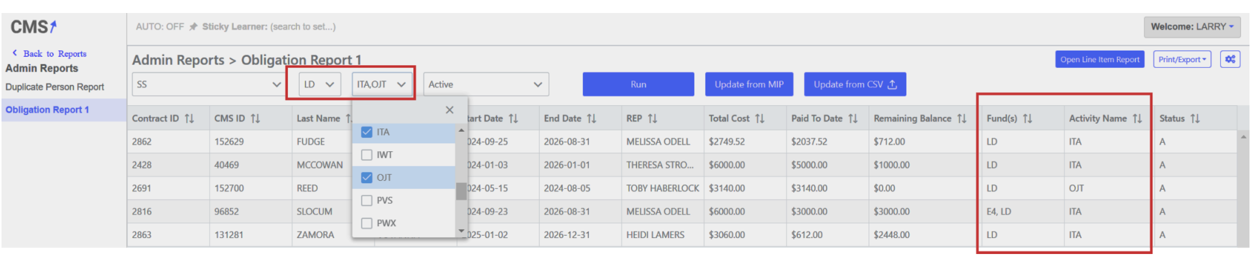


Contract ID	Start Date	Fund Code	Act Code	Onet Code	Branch ID	Branch Name	Supervisor Name	Branch Phone	Job Title	Wage Rate	Staff
237	2017-03-19	R5	OJT	49-9071.00	632	12 Tribes Re...	Marvin Abrahamson	5094224646	Facility Labo...	11.00	GARZA-ACE...
247	2017-04-04	LD	OJT	33-9031.00	632	12 Tribes Re...		5094224646	Security Offi...	11.43	HINGER
636	2018-06-14	LO	WEX		715	A Point in Ti...	Tom Prang	5096999622	Maintenanc...	11.50	MATAYA
845	2019-01-21	LD	OJT	53-3032.00	744	AAA Ready...	Mark Walker	5097651423	Loader Ope...	19.00	ROBEY
1390	2020-08-31	LA	OJT	53-3032.00	744	AAA Ready...	Mark Walker	5097651423	Mixer Driver	19.50	MORRIS
1410	2020-09-16	LA	OJT	53-3032.00	744	AAA Ready...	Mark Walker	5097651423	Cement Tru...	19.50	MORRIS
1530	2021-01-24	ER	OJT	53-3032.00	744	AAA Ready...		5097651423	truck driver	19.50	ADAMSON
1743	2021-08-18	LD	OJT	53-3032.00	744	AAA Ready...		5097651423	concrete tru...	22.00	ADAMSON
154	2016-05-08	LA	OJT	43-3031.00	596	ABC Service...	Michele	5092890833	Accounting ...	10.00	ALLEN
199	2016-11-30	LA	OJT	43-4171.00	99	ACCOR TEC...	Donna Terry	5096620608	Receptionist	13.00	BERNSTEIN
130	2016-03-02	SP	OJT	43-5041.00	584	Accu-Read	John Smits	5096705894	Meter Reader	23.09	BERNSTEIN
980	2019-07-07	PT	PWX		769	Adams Cou...	Kyya Grant	5094885514	Nonfarm A...	12.00	GUTIERREZ
985	2019-07-07	PT	PWX		769	Adams Cou...	Kyya Grant	5094885514	Nonfarm A...	12.00	GUTIERREZ
991	2019-07-08	PT	PWX		769	Adams Cou...	Kyya Grant	5094885514	Nonfarm A...	12.00	GUTIERREZ
1340	2020-07-12	PT	PWX		769	Adams Cou...	Kyya Grant	5094885514	Non farm A...	13.50	GUTIERREZ
1341	2020-07-12	PT	PWX		769	Adams Cou...	Kyya Grant	5094885514	Non farm a...	13.50	GUTIERREZ
1437	2020-10-18	LO	WEX		769	Adams Cou...	Kyya Grant	5094885514	Nonfarm A...	13.50	GUTIERREZ

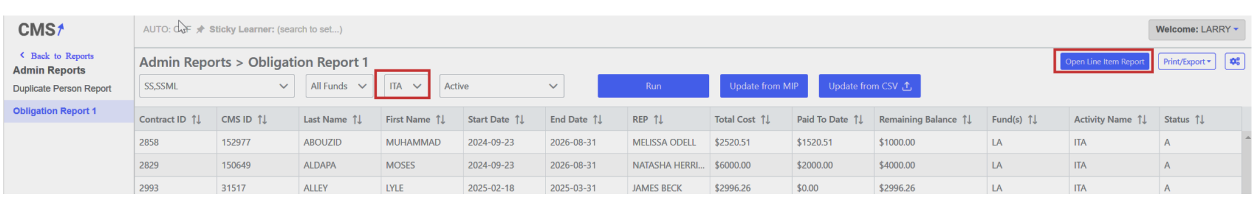
Admin Reports/Obligations Report 1



Contract ID	CMS ID	Last Name	First Name	Start Date	End Date	REP	Total Cost	Paid To Date	Remaining Balance	Fund(s)	Activity Name	Status



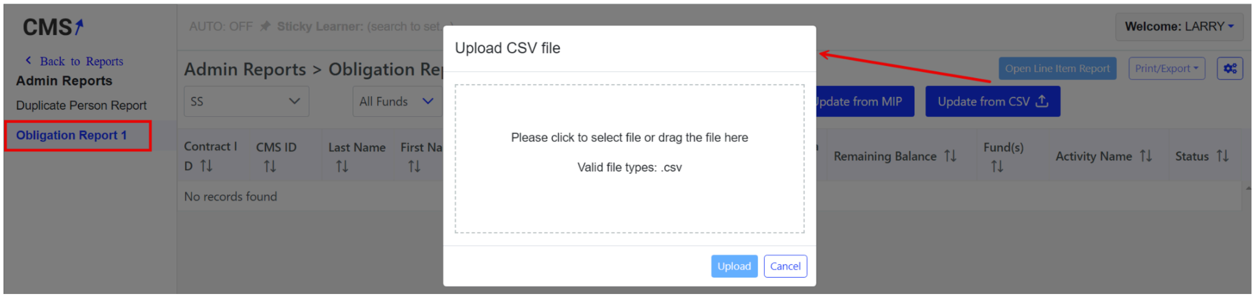
Contract ID	CMS ID	Last Name	First Name	Start Date	End Date	REP	Total Cost	Paid To Date	Remaining Balance	Fund(s)	Activity Name	Status
2862	152629	FUDGE		024-09-25	2026-08-31	MELISSA ODELL	$2749.52	$2037.52	$712.00	LD	ITA	A
2428	40469	MCCOWAN		024-01-03	2026-01-01	THERESA STRO...	$6000.00	$5000.00	$1000.00	LD	ITA	A
2691	152700	REED		024-05-15	2024-08-05	TOBY HABERLOCK	$3140.00	$3140.00	$0.00	LD	OJT	A
2816	96852	SLOCUM		024-09-23	2026-08-31	MELISSA ODELL	$6000.00	$3000.00	$3000.00	E4, LD	ITA	A
2863	131281	ZAMORA		025-01-02	2026-12-31	HEIDI LAMERS	$3060.00	$612.00	$2448.00	LD	ITA	A



Contract ID	CMS ID	Last Name	First Name	Start Date	End Date	REP	Total Cost	Paid To Date	Remaining Balance	Fund(s)	Activity Name	Status
2858	152977	ABOUZID	MUHAMMAD	2024-09-23	2026-08-31	MELISSA ODELL	$2520.51	$1520.51	$1000.00	LA	ITA	A
2829	150649	ALDAPA	MOSES	2024-09-23	2026-08-31	NATASHA HERRI...	$6000.00	$2000.00	$4000.00	LA	ITA	A
2993	31517	ALLEY	LYLE	2025-02-18	2025-03-31	JAMES BECK	$2996.26	$0.00	$2996.26	LA	ITA	A

The **Open Line Item Report** is for contract types that have line item child records like ITAs. The Line Item Report will include all the line item data in a wide spreadsheet like table that can be easily exported to an Excel spreadsheet.

CSV upload feature for reading MIP Contract Hours to Date and Paid to Date amounts in CMS Contracts.



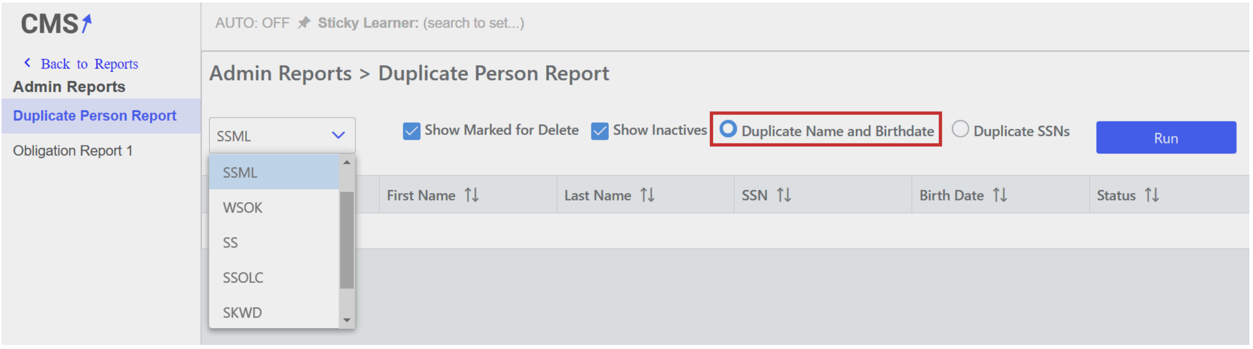
This feature requires a plain text csv file having the contract number, the hours and the paid amounts from MIP. The MIP report has been created and saved and can be run at any time. Currently the MIP API's do not give us access to the payroll records and so this feature gives us a way to batch upload MIP payroll data into CMS. Here are the steps involved in this process:

1. Run the saved MIP report with the desired date ranges which produces an Excel sheet with every payment made on a wage-based CMS contract. There will often be multiple rows for each contract.
2. The Excel file must be of type .xslx and contains only three columns:

Distribution Code	PTD Hours	PTD Amount
1234	31.5	465.00
1234	25	375.00

3. We change the headers to ContractID, Hours and Amount. We then ask ChatGPT to subtotal these and produce a downloadable csv file with the totals. The GPT prompt for this is "Subtotal the Hours and Amount by ContractID and give me a downloadable csv file named prPTD.csv"
4. Then as in the screenshot above, we click the button **Upload from CSV** and navigate to the location of the file prPTD.csv. CMS will then process this data and update each of the contracts one at a time.
5. When the process is finished a message to that effect will appear in the upper right corner with a comma-separated list of contract numbers that were changed in the process.

Admin Reports/Duplicate Person Report



This report should be run at least weekly (but ideally at the end of each day) in order to find duplicates BEFORE a bunch of child records (workshop enrollments, attendance records, test records, etc) get added. Please notice that this report is based on Duplicate Name and Birthdate. This means two or more records with EXACTLY the same first name, last name and birthdate. **Be aware of the rare possibility that the records could be for two different people who just happen to have the same name and birthdate.**

How do duplicate records get created?

1. By not doing a thorough search BEFORE adding a new person record. Here is what a "thorough" search looks like:
    a. First do a search by birthdate. (This is why it is essential to collect the birth date for every participant)
    b. Second, do a search by last name comma first name So if searching for Mary Jacobs the entry would look like this: **Jacobs, Mary**
    c. Third, to a search by last name comma first initial. So the search entry would look like this: **Jacobs, M** . The reason for this is to catch records where the first name is misspelled.

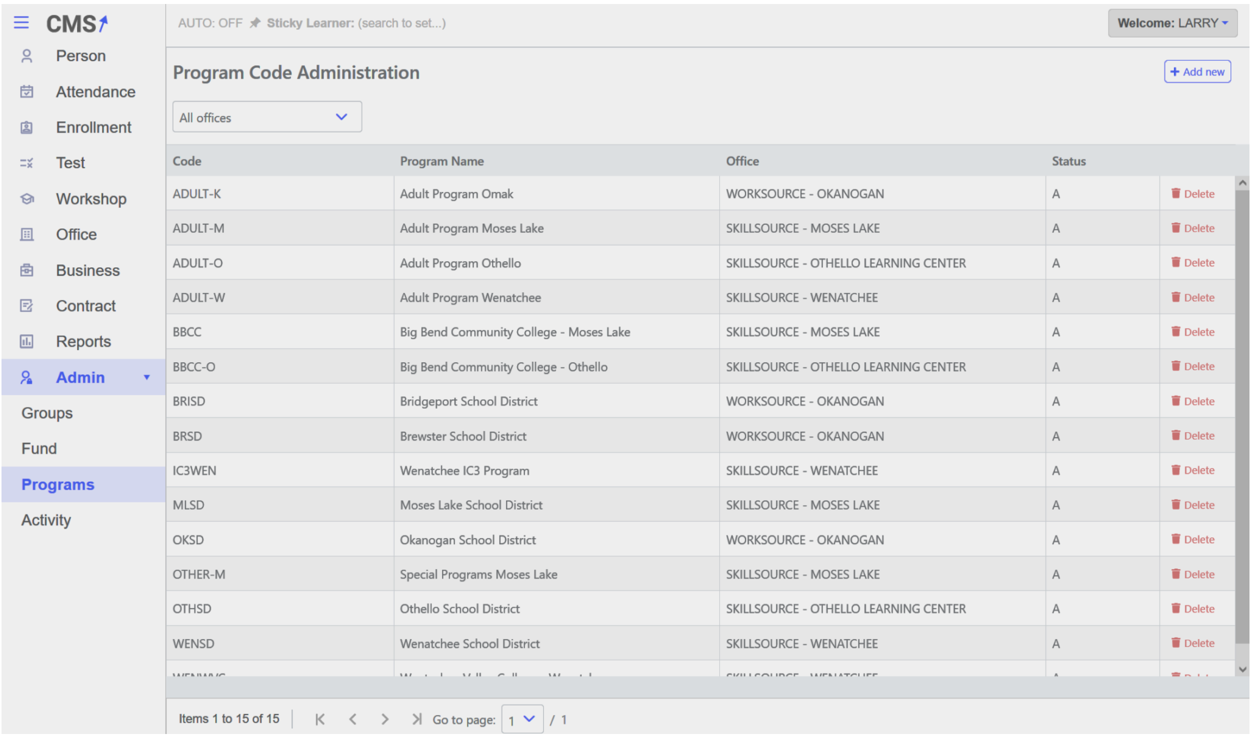
2. By scenarios like the following: The person first came to us many years ago using their maiden name, but now they are married or they have been through a formal name-change process. This is why you should always ask "Have you ever been to our office before and if so, what name did you use?" When this occurs, we need to make sure we update the name and make sure the birth date and at least the last four digits of their social security number are entered correctly.

Note: You might be tempted to say "In the heat of a busy front desk (five minutes before the workshop starts), I do not have time to do a thorough search before adding a new record. That is why this Duplicate Person Report exists. At the end of the day, after you have locked the front door, run this report for your office to help find duplicate records as soon as possible.

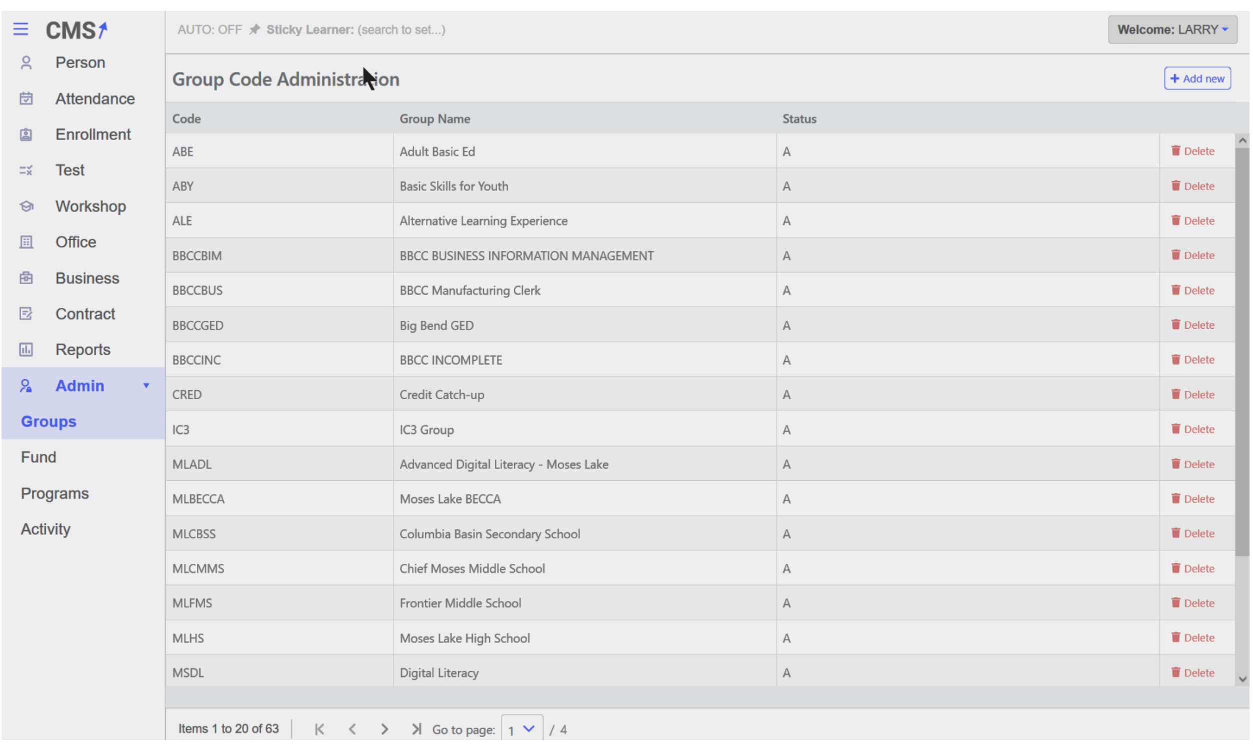
When records appear in the grid after running this report, there are right-click menu options for dealing with them.

Admin

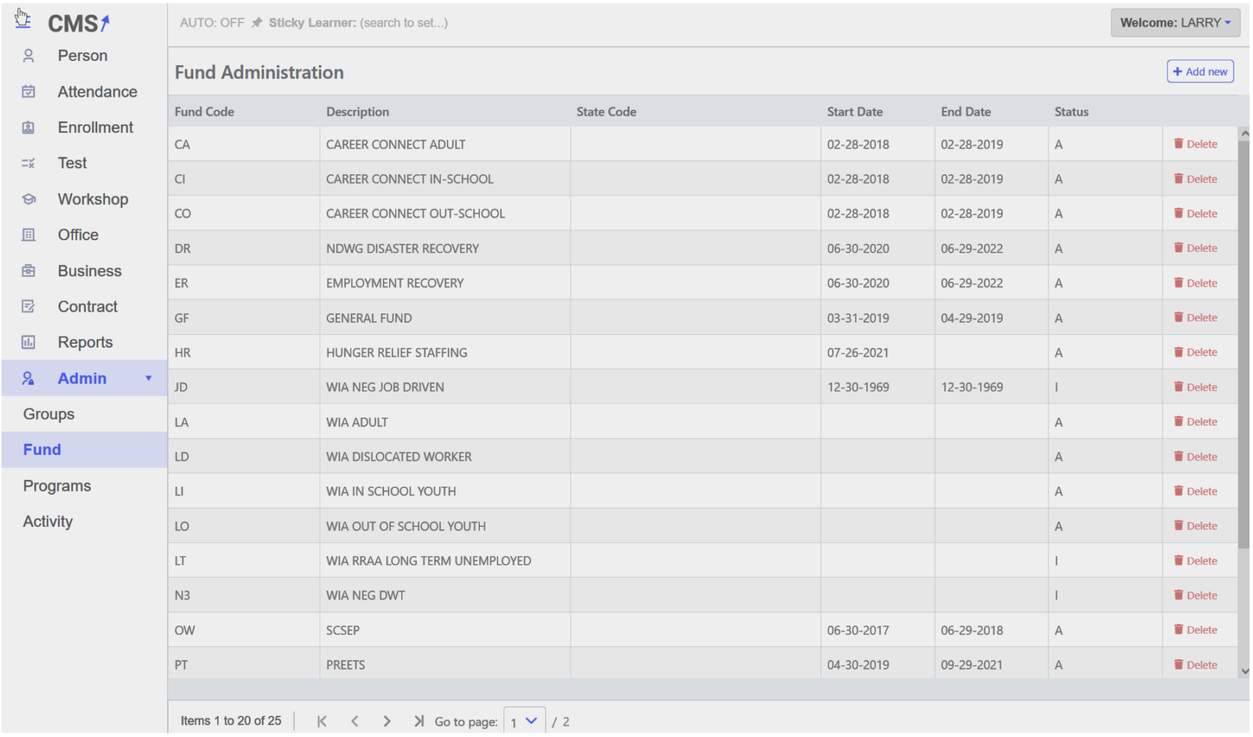
Programs



Groups

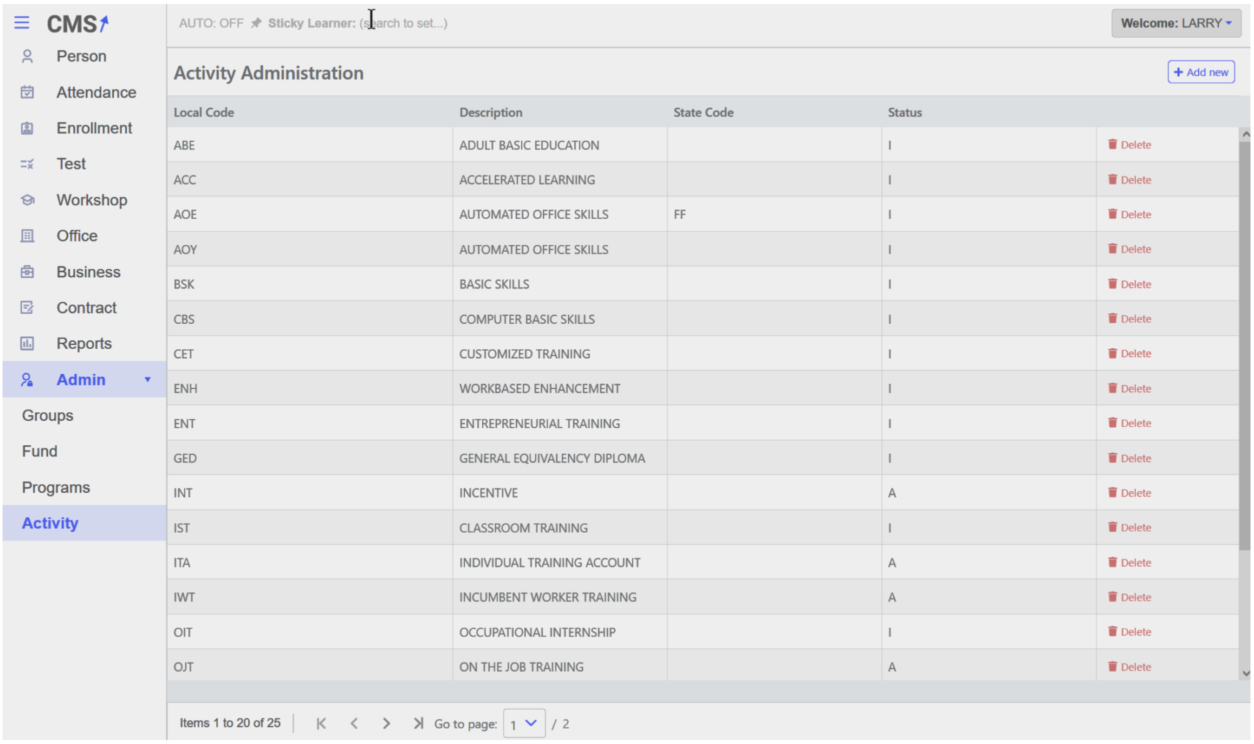


Fund



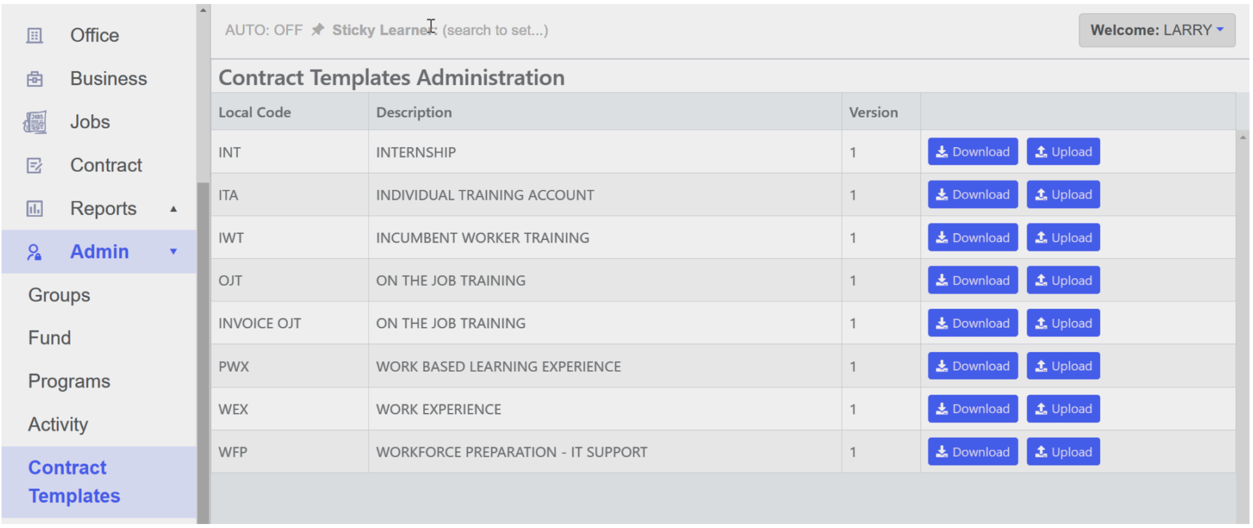
This Fund code table is managed by our accountant and it makes possible some real-time control over the contracting system. If any part of a contract's duration falls outside the start-date/end-date range of the fund associated with it, the user will get a message about it and be prevented from further processing. This check happens only on Fund Codes that have a start and end date. If a record has a start date but no end date, then contracts will be prevented that start before the fund start date.

Activity



All contracts must be associated with an active Activity code. The codes with an “I” for Inactive will not show up on the drop-downs in the contract entry/edit screens. The contract type is associated with one of these activity codes and the contract entry/edit wizards behave differently for each activity. Different data is collected and different signable contracts generated depending on the associated activity. There is another admin feature called Contract Templates Administration that enables some simple editing of the boilerplate language on the printed contracts.

Contract Templates Administration



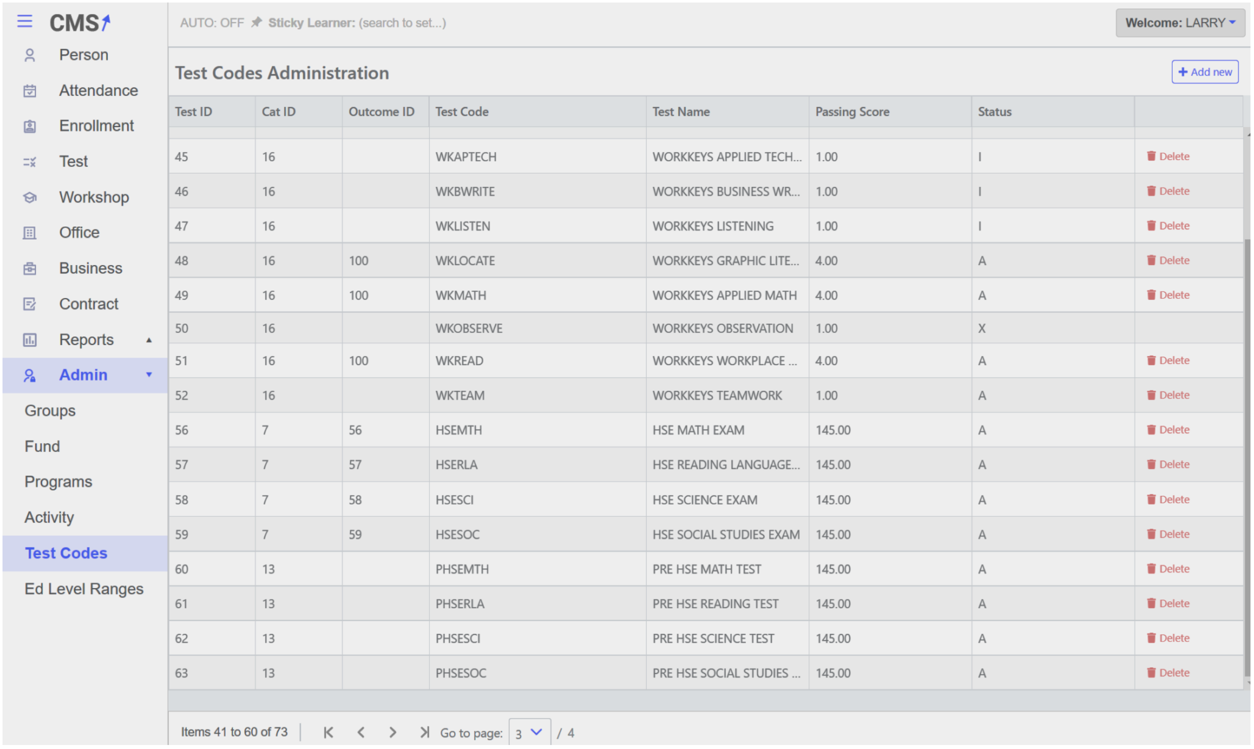
This screen enables admin staff to make minor changes to the contract templates (boilerplate) without having to go to the programmers. However, these downloadable templates are **HTML documents**, requiring the editors to have some very basic HTML knowledge. To put it another way, the editors simply need to know not to change any HTML codes. The following is an example of such a document for the Internship agreement where the red outlined text is what could be edited:

```
</head>

<body>
    <div id="mainContent">
        <div id="page1" class="page" style="padding-top:40px;">
            @if ($data->contract->modNumber != 0)
                <div id='revisionInfo'>
                    <span class="label">Revision #:</span><span class='data'
                        style="width:50px;">{{ $data->contract->modNumber }}</span>
                    <span class="label">Revision Date:</span><span class='data'>{{ $data->lastModDate }}</span>
                </div>
            @endif
            <div class="section-header center">
                <h3 style='margin-bottom:0'>{{ $data->activity->activityDescription }} AGREEMENT</h3>
            </div>
            <p>The purpose of this agreement is to provide the Trainee with an opportunity for career exploration and skill
                development. The parties entering into this agreement are:</p>
            <div class="fullSigLine"><b>{{ $data->branch->branchName }}</b>
                <div class="noblock">, hereinafter referred to as BUSINESS,</div>
            </div>
            <div class="fullSigLine"><b>{{ $data->person->fullname }}</b>
                <div class="noblock">, hereinafter referred to as TRAINEE, and SkillSource.</div>
            </div>
            <div class="fullSigLine">This agreement begins <b class="underline">{{ $data->startDate }}</b> and ends <b
                    class="underline">{{ $data->endDate }}</b> or after <b
                    class="underline">{{ $data->contract->totalHours }}</b> hours worked, whichever comes first.
            </div>
            @php use App\Enums\Contract\ContractTypeEnum; @endphp
            <div class="section-header" style="padding-top:15px;padding-bottom:15px;">A. Business agrees to:</div>
            <ol class="agreeOL">
                <li>Teach Trainee assigned tasks (Attachment C: Training Plan).</li>
                <li>Evaluate Trainee’s competence performing assigned tasks (Attachment C Training Plan).</li>
```

The section in red above is enclosed in HTML **p**aragraph tags **<p>...</p>**. Three lines from the bottom you see an HTML **o**rdered **l**ist tag **
. And a list has one or more HTML **line **i**tem tags **
...
. If the edit involved adding a new line item, then a new set of tags would need to be added as well. Most HTML tags are entered as pairs: an opening tag
** and a closing tag**
**. So you have just learned all the HTML you need to know!

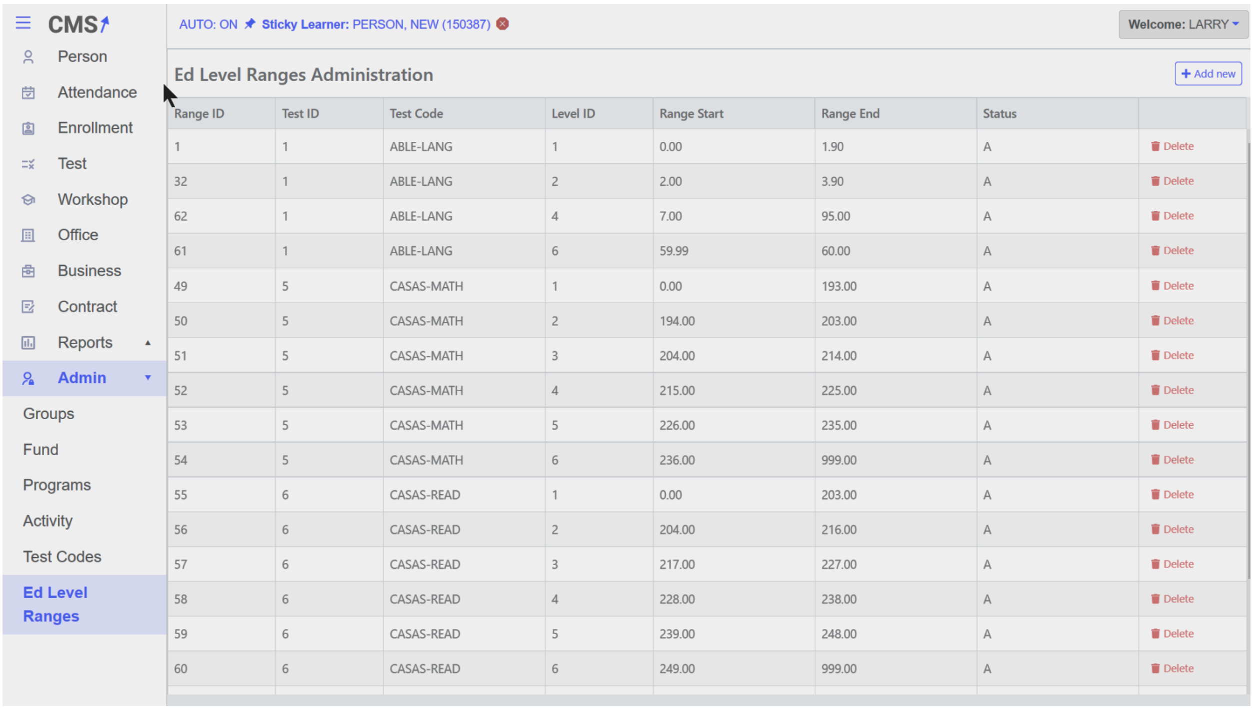
Test Codes



Test ID	Cat ID	Outcome ID	Test Code	Test Name	Passing Score	Status	
45	16		WKAPTECH	WORKKEYS APPLIED TECH...	1.00	I	Delete
46	16		WKBWRITE	WORKKEYS BUSINESS WR...	1.00	I	Delete
47	16		WKLISTEN	WORKKEYS LISTENING	1.00	I	Delete
48	16	100	WKLOCATE	WORKKEYS GRAPHIC LITE...	4.00	A	Delete
49	16	100	WKMATH	WORKKEYS APPLIED MATH	4.00	A	Delete
50	16		WKOBSERVE	WORKKEYS OBSERVATION	1.00	X	
51	16	100	WKREAD	WORKKEYS WORKPLACE ...	4.00	A	Delete
52	16		WKTEAM	WORKKEYS TEAMWORK	1.00	A	Delete
56	7	56	HSEMTH	HSE MATH EXAM	145.00	A	Delete
57	7	57	HSERLA	HSE READING LANGUAGE...	145.00	A	Delete
58	7	58	HSESCI	HSE SCIENCE EXAM	145.00	A	Delete
59	7	59	HSESOC	HSE SOCIAL STUDIES EXAM	145.00	A	Delete
60	13		PHSEMTH	PRE HSE MATH TEST	145.00	A	Delete
61	13		PHSERLA	PRE HSE READING TEST	145.00	A	Delete
62	13		PHSESCI	PRE HSE SCIENCE TEST	145.00	A	Delete
63	13		PHSESOC	PRE HSE SOCIAL STUDIES ...	145.00	A	Delete

This table defines the tests that theTest Tracking system uses. Let's take HSEMTH for example. Notice that the passing score is 145. This can be edited when the passing score changes. Also note the column labeled **Outcome ID.** If there is an outcome earned when passing the test, there will be a number in this column. The Outcome ID for HSEMTH is 56. The outcome record is automatically added to the Enrollment Outcome table when this test is passed.

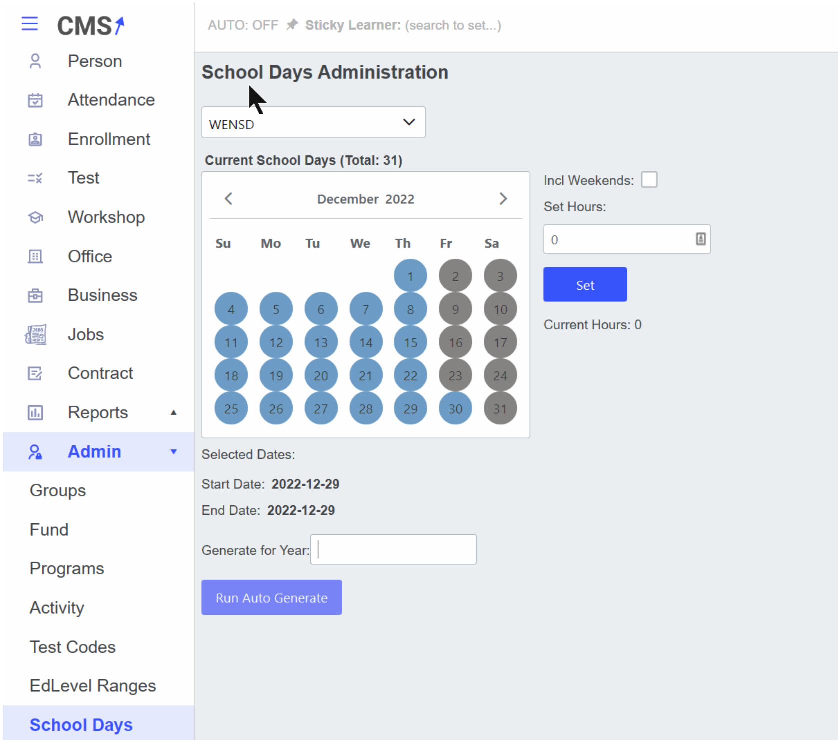
EdLevel Ranges



Range ID	Test ID	Test Code	Level ID	Range Start	Range End	Status	
1	1	ABLE-LANG	1	0.00	1.90	A	Delete
32	1	ABLE-LANG	2	2.00	3.90	A	Delete
62	1	ABLE-LANG	4	7.00	95.00	A	Delete
61	1	ABLE-LANG	6	59.99	60.00	A	Delete
49	5	CASAS-MATH	1	0.00	193.00	A	Delete
50	5	CASAS-MATH	2	194.00	203.00	A	Delete
51	5	CASAS-MATH	3	204.00	214.00	A	Delete
52	5	CASAS-MATH	4	215.00	225.00	A	Delete
53	5	CASAS-MATH	5	226.00	235.00	A	Delete
54	5	CASAS-MATH	6	236.00	999.00	A	Delete
55	6	CASAS-READ	1	0.00	203.00	A	Delete
56	6	CASAS-READ	2	204.00	216.00	A	Delete
57	6	CASAS-READ	3	217.00	227.00	A	Delete
58	6	CASAS-READ	4	228.00	238.00	A	Delete
59	6	CASAS-READ	5	239.00	248.00	A	Delete
60	6	CASAS-READ	6	249.00	999.00	A	Delete

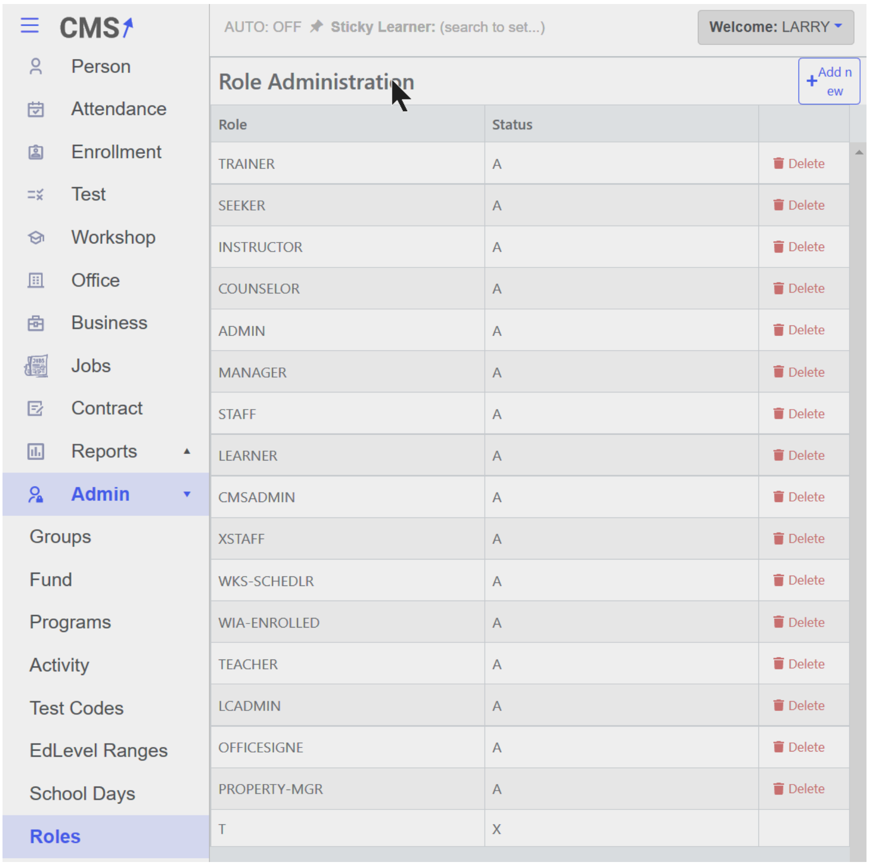
This table holds the data necessary for calculating an Educational Function Level (EFL). A level is associated with a range. For CASAS-MATH, for example, if the student scores between 204 and 214, their EFL is 3.

School Days



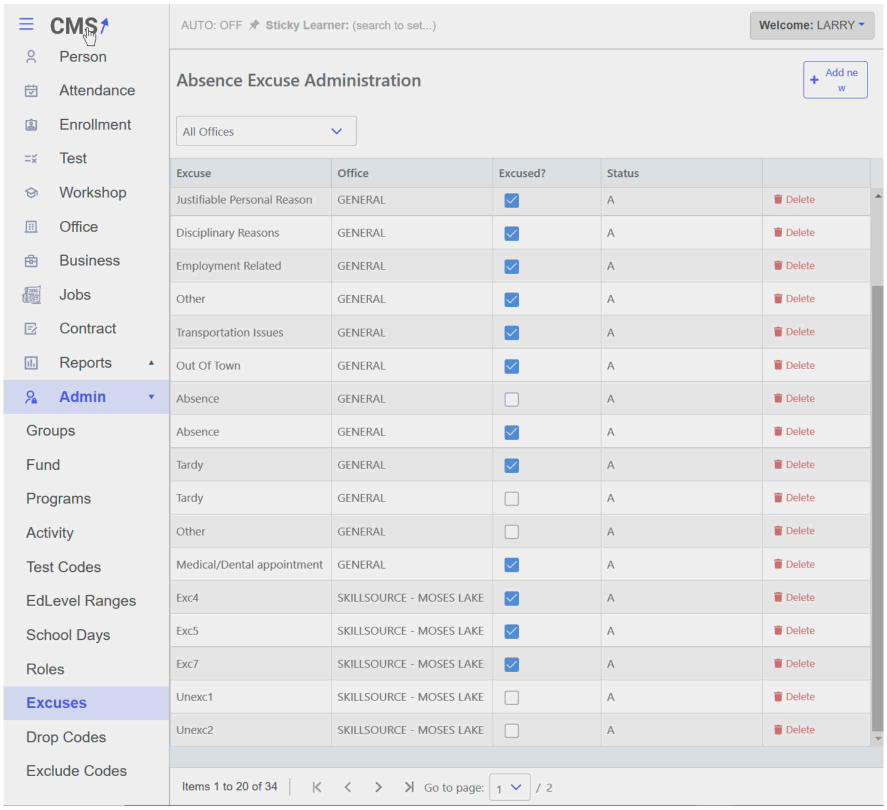
Provide explanation of how this screen works: (coming)

Roles

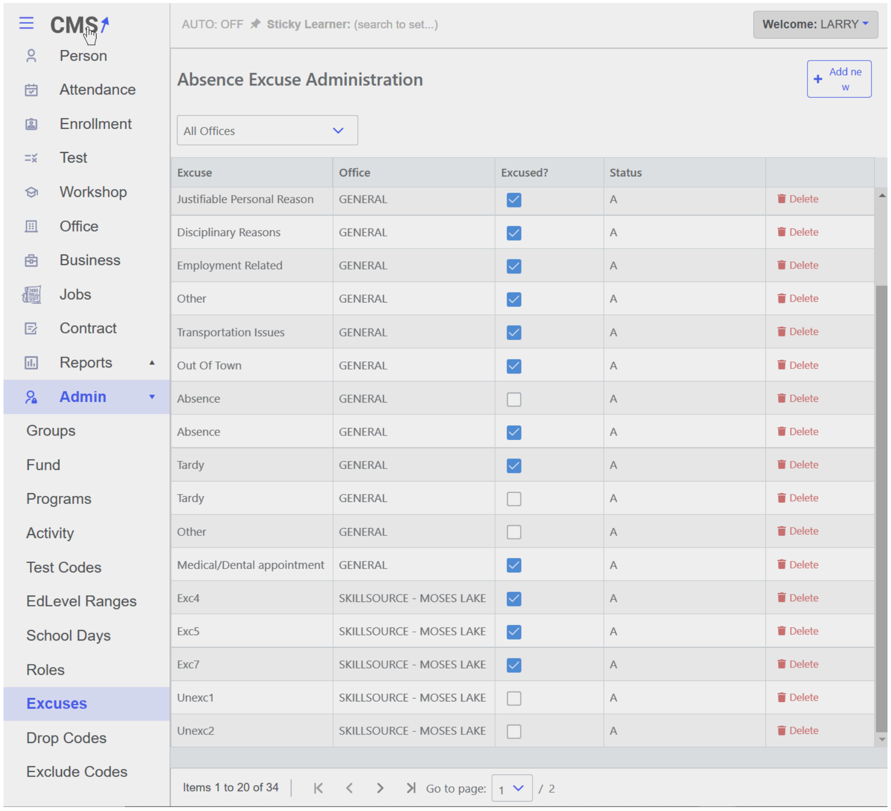


Role	**Function**
ADMIN	Office admin menu items and permissions
CMSADMIN	FULL admin access regardless of login office
COUNSELOR	Currently undefined
INSTRUCTOR	Workshop instructor
LCADMIN	Learning center admin
LEARNER	Attendance and Test records enabled
MANAGER	More rights than staff by office
OFFICESIGNE	Person in the office that signs contracts (Only one)
SEEKER	All Person records get this role by default
STAFF	General staff menus and permissions
TEACHER	Learning center teacher
TRAINER	Training rep access and permissions
WKS-SCHEDLR	Able to create new workshops
XSTAFF	For staff access to offices other than their own

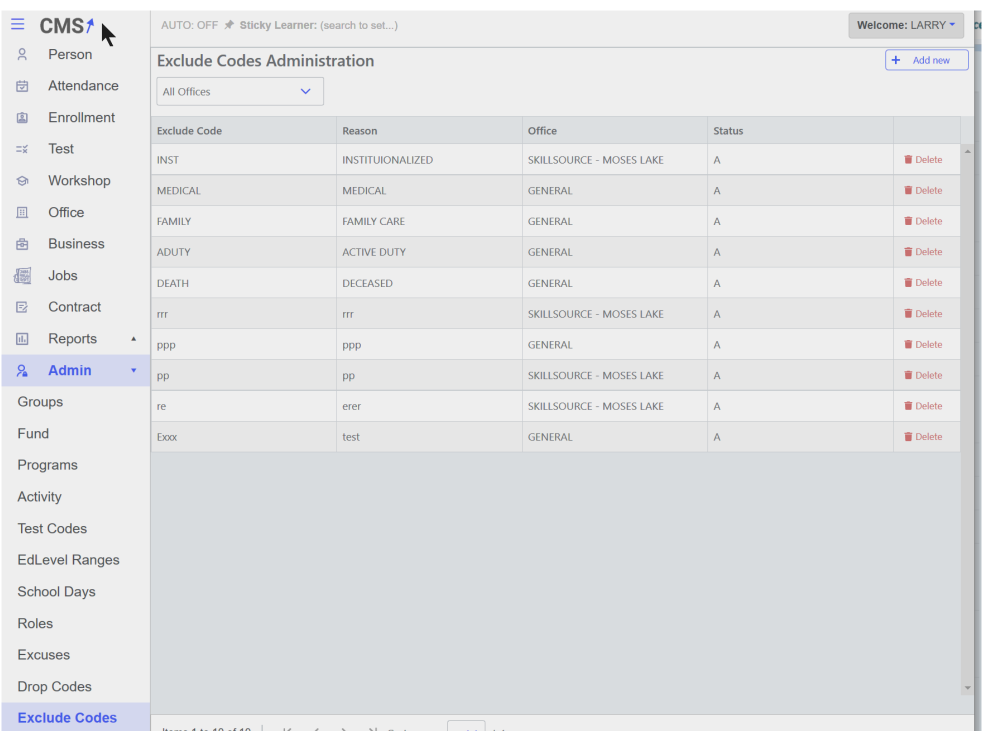
Excuses


CMS
Person
Attendance
Enrollment
Test
Workshop
Office
Business
Jobs
Contract
Reports
Admin
Groups
Fund
Programs
Activity
Test Codes
EdLevel Ranges
School Days
Roles
Excuses
Drop Codes
Exclude Codes
AUTO: OFF Sticky Learner: (search to set...)
Welcome: LARRY
Absence Excuse Administration
Add new
All Offices
Excuse
Office
Excused?
Status
Justifiable Personal Reason
Disciplinary Reasons
Employment Related
Other
Transportation Issues
Out Of Town
Absence
Absence
Tardy
Tardy
Other
Medical/Dental appointment
Exc4
Exc5
Exc7
Unexc1
Unexc2
GENERAL
SKILLSOURCE - MOSES LAKE
A
Delete
Items 1 to 20 of 34
Go to page: 1 / 2

Drop Codes



Exclude Codes



CMS User Maintenance Roles and Responsibilities

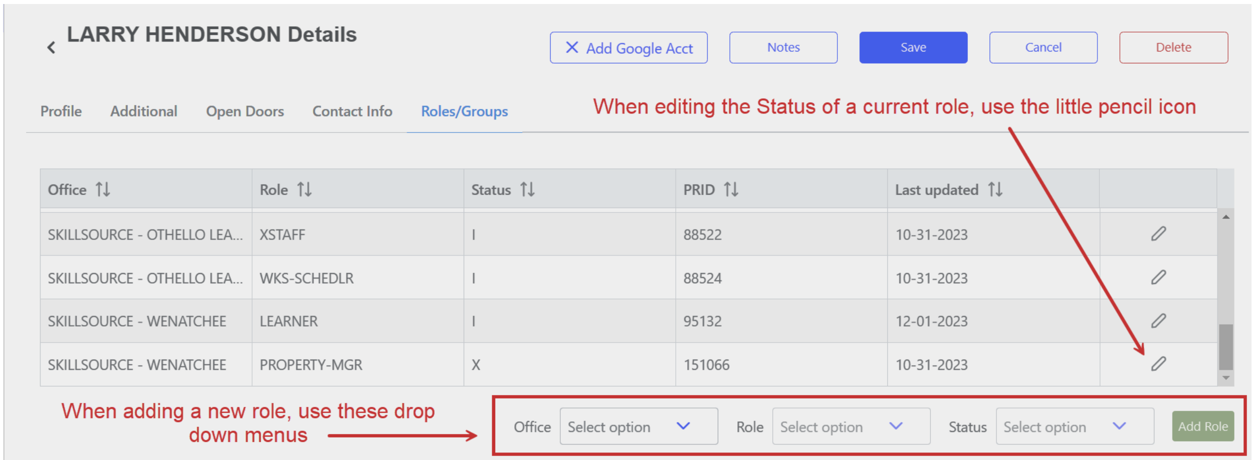
Creating a New Staff User

- Overview. This role can and probably should be distributed to each of the offices but it can also be centrally managed by the main office (Wenatchee Skillsource). The role is important for the following reasons.
    1. New staff users depend on the timely completion of this task in order to do their jobs.
    2. STAFF users have access to an enormous amount of sensitive personal information on Skillsource participants.
    3. A STAFF person can have many roles depending on their job requirements. These roles will need to be added after their record is created.

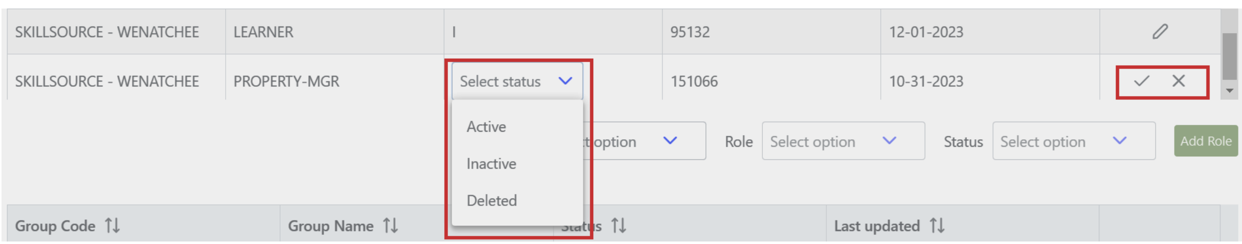
Deactivating A Staff User

- Overview. This role can and probably should be distributed to each of the offices but it can also be centrally managed by the main office (Wenatchee Skillsource). The role is important for the following reasons.
    1. It is a significant security risk for former employees to continue to have access to CMS after leaving employment, unless they happen to be someone who is still needed as a part-time employee.
    2. STAFF users have access to an enormous amount of sensitive personal information on Skillsource participants.
    3. Each of the roles that were assigned will need to be individually set to “inactive” when they leave. It is not enough to simply set their ‘person’ record to inactive.

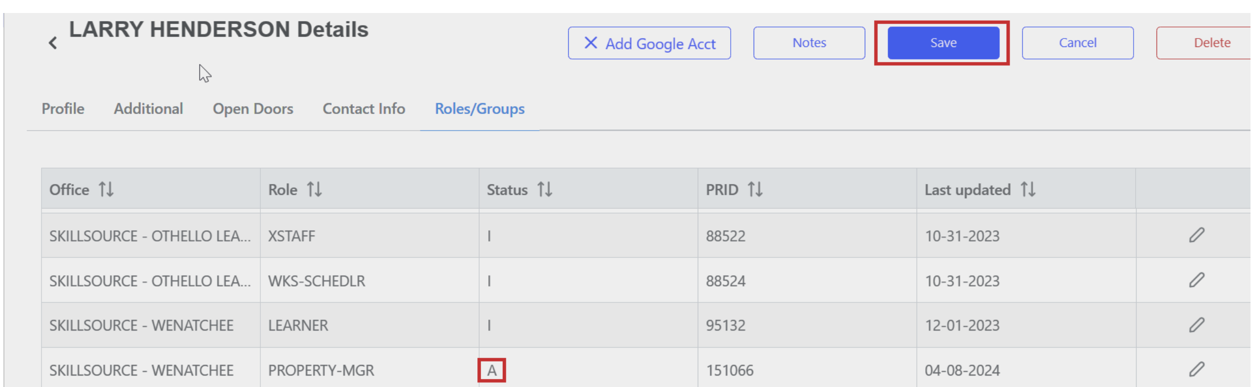
Roles Maintenance Screen



I want to change the Property MGR back to 'A' for Active. When I click on the pencil I see the following change to the screen:



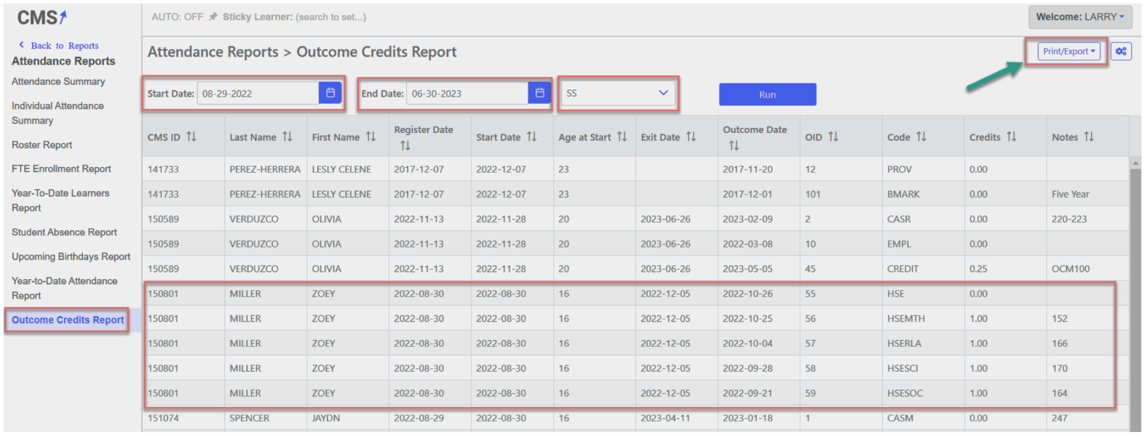
Click 'X' to Cancel the current operation. I will select 'Active' from the Status dropdown. And then, in order for the change to be written to the database, you must click the checkmark icon. Note: This does **NOT** mean you do not still need to press the blue **Save** button to save all the other changes you may have made to the profile.



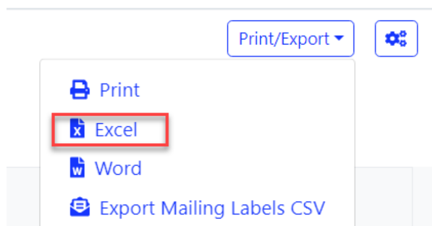
Using Excel Pivot Tables to Enhance CMS Reports

See the following tutorial: [Pivot Table Tutorial]

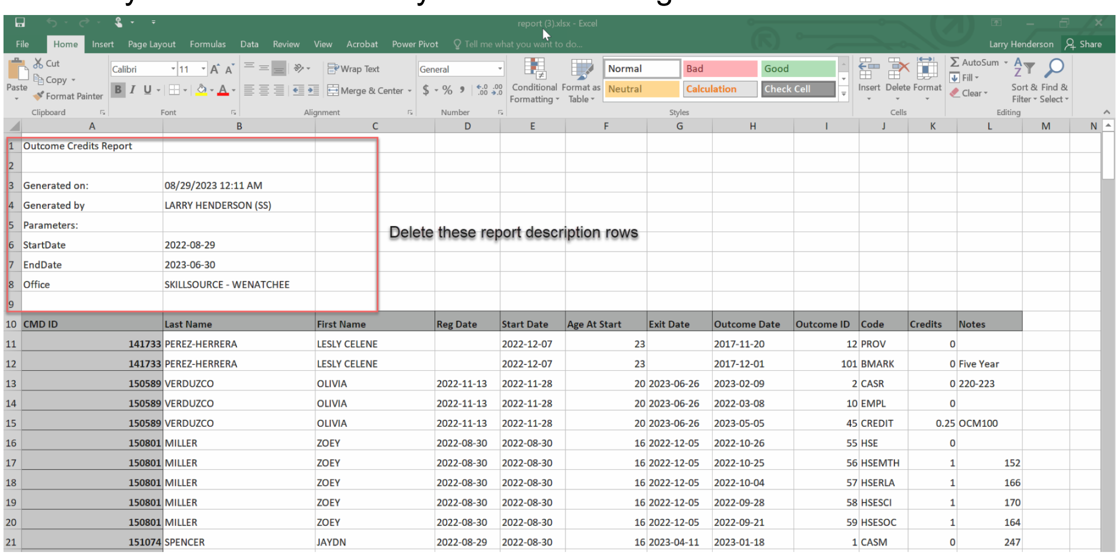
Let's use the Outcome Credits Report under Attendance Reports for this example.



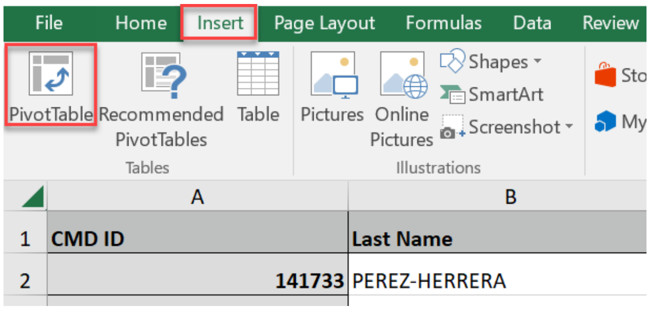
The date range we are using is the entire Open Doors school year starting in August of 2022. We have selected the office SS (Skillsource Wenatchee).



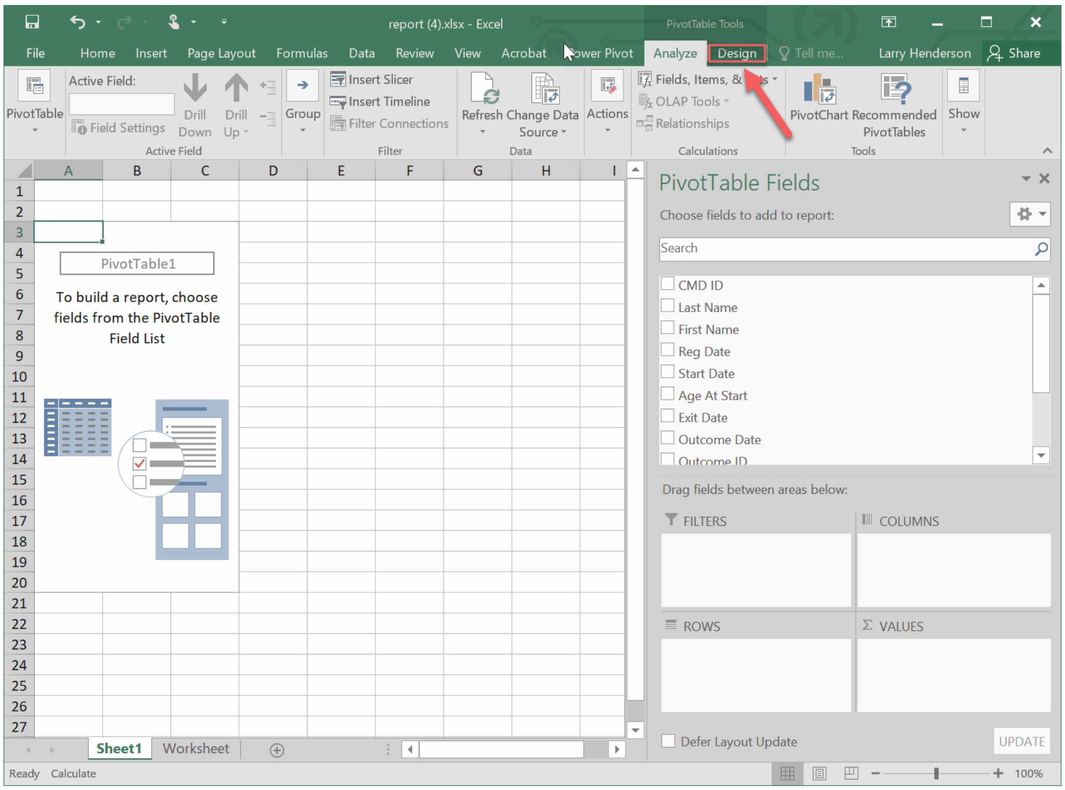
We want to Export this report to Excel. This will create an Excel file called "Report". Here is what this will look like when opened in Excel. You will need to click the yellow button that says "Enable Editing"



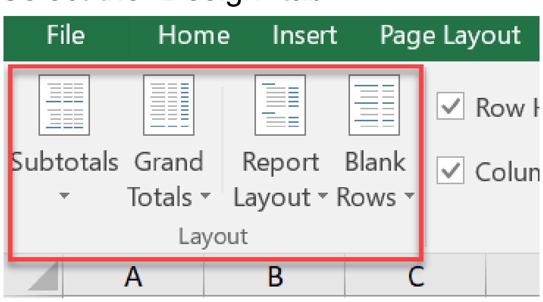
After deleting the description rows (marked in red above), then click the “Insert”



Click on Pivot Table and just accept the defaults until you get to this screen:

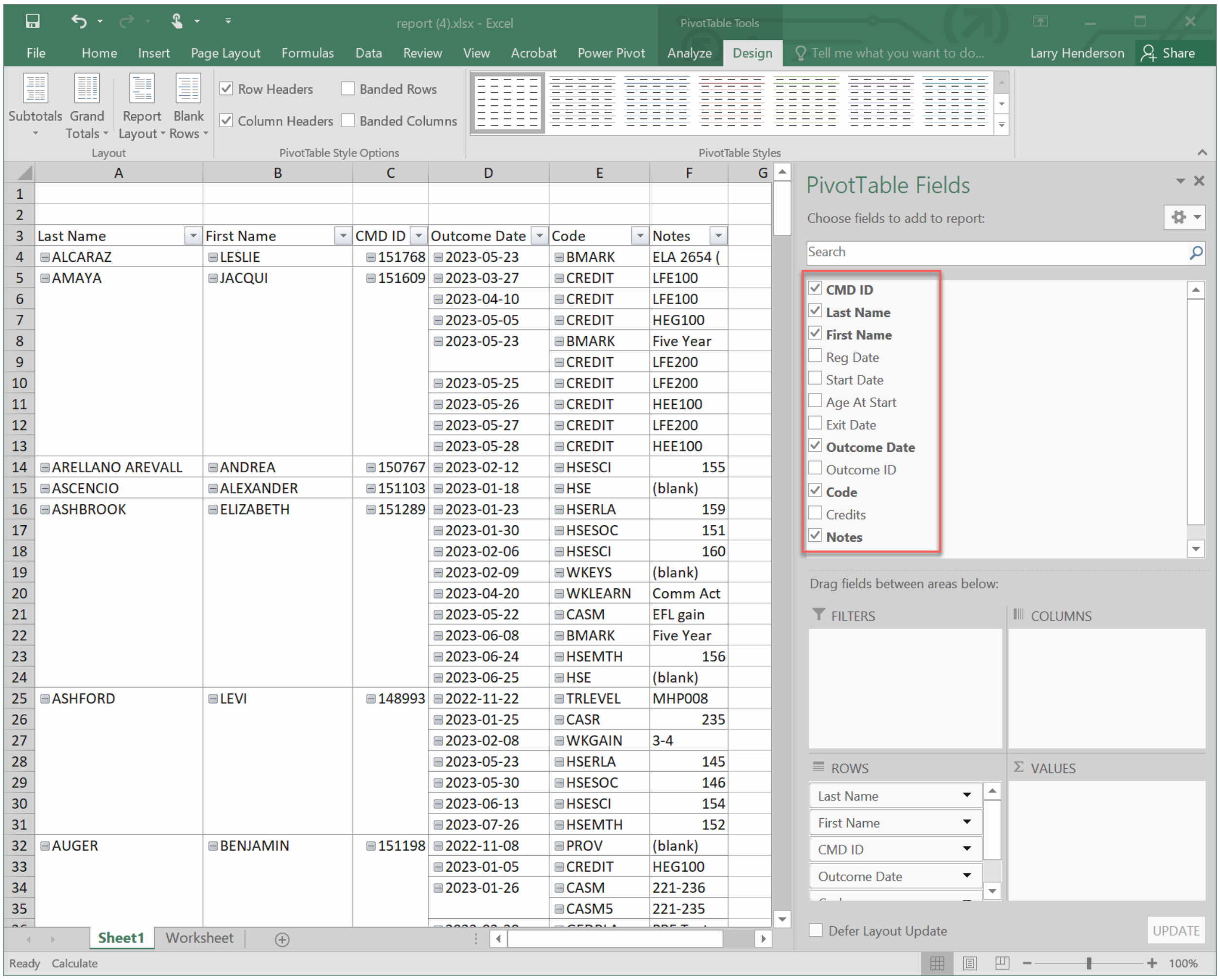


Select the “Design” tab.



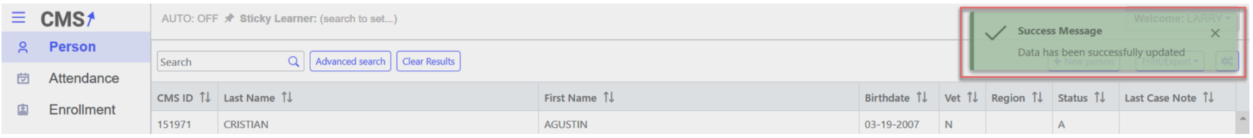
Click Subtotals and select “**Do Not Show Subtotals**”.
Click Grand Totals and select “**Off For Rows and Columns”.**
Click Report Layout and select “**Show In Tabular Form**”.
Click Blank Rows and select “**Remove Blank Line After each Item**”.

Then select the fields you want included in the report.
Make sure your first selection is the Last Name field.

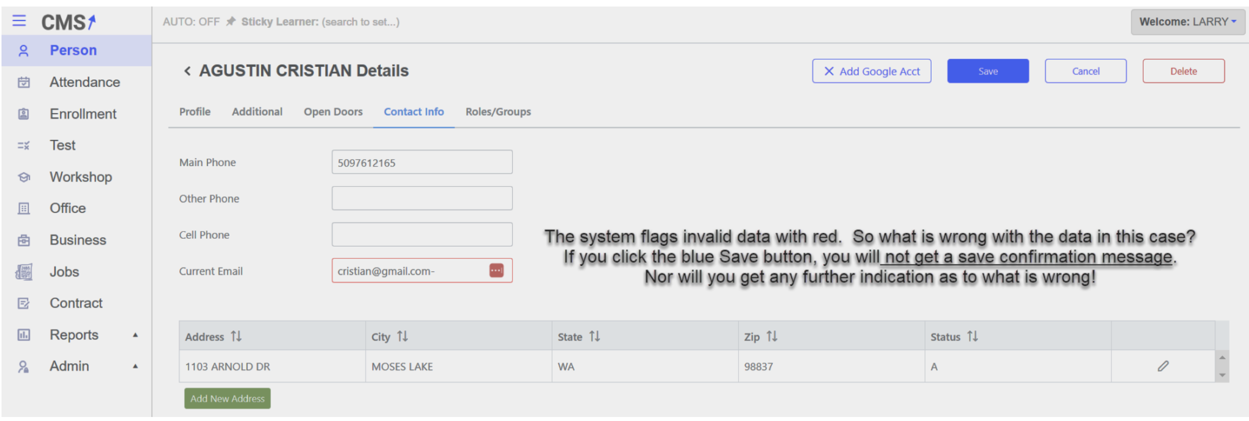


Tips and Troubleshooting

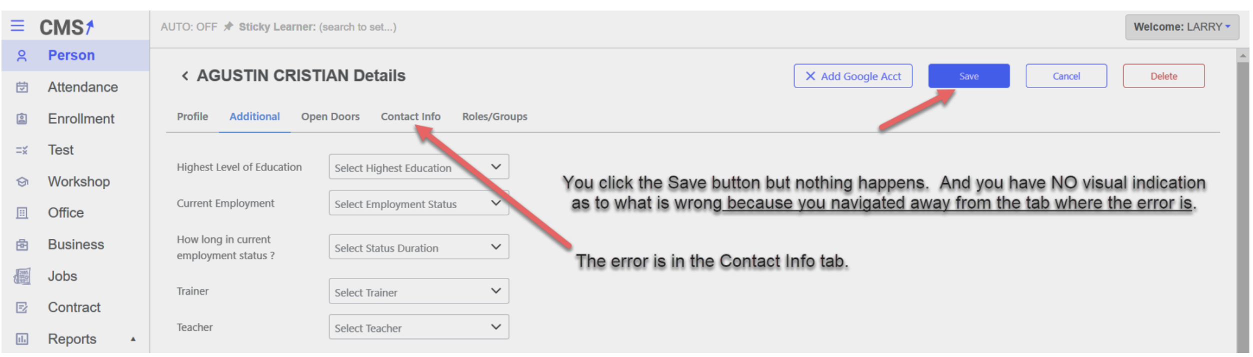
1. What if I click Save but do not see the confirmation message?



This usually means that some field has invalid information. For example, consider an invalid email address:



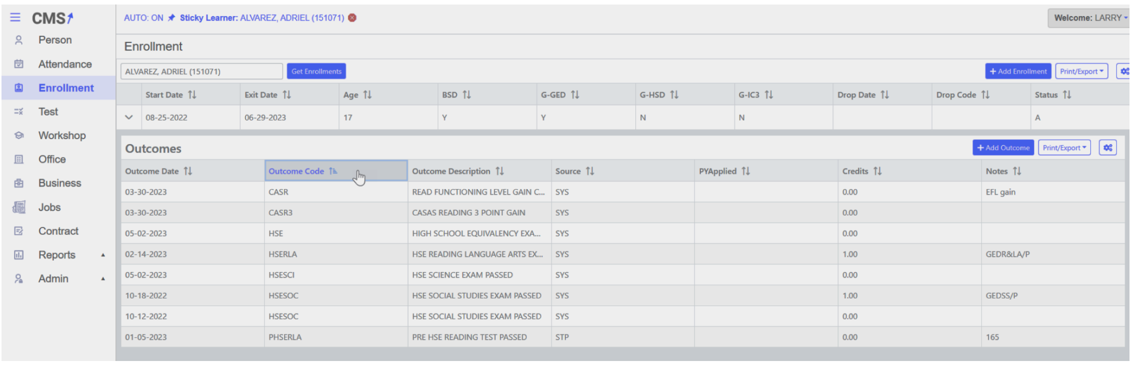
This visual indication of what is wrong is helpful **IF** you happen to be on the profile tab where the error has occurred. **But what if you are on some other tab in the person profile when you click the blue Save button?**



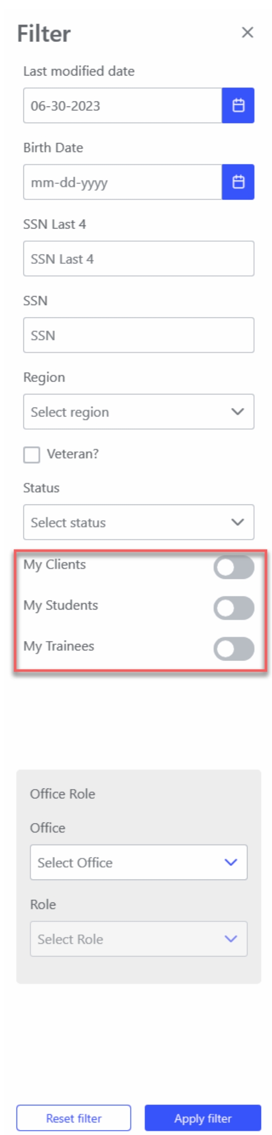
So your takeaway from this tip is this: If you click the blue Save button and you do not get the green save confirmation message in the upper right corner, **then click through all the profile tabs looking for red outlined fields of invalid or missing required information**. Correct the error and click Save again. You are not done until you see the green Save confirmation message.

2. How can I sort the data in the grid I am looking at?

You can sort almost all the data grids by clicking on a column header. I clicked on the Outcome Code column header and the records became sorted in ascending order by code. Click the header again to sort in the opposite order.

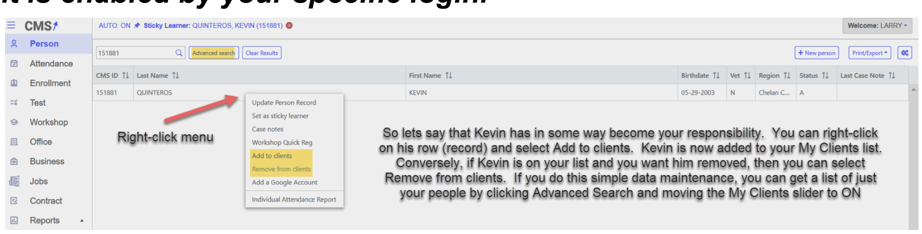


3. What are My Clients, My Trainees and My Students?

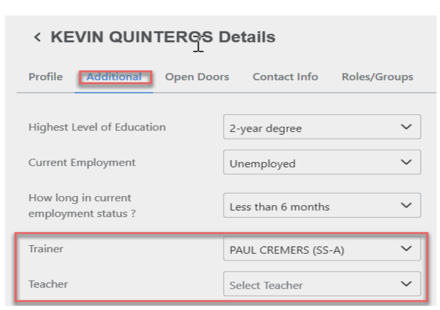


This is the data entry form that snaps to the right side of your screen when you click **Advanced Search.** The specific focus of this tip are the options with the red box around them. Your My Clients list is totally managed by you as I will show a little later. Your My Students list and My Trainees list are controlled by those people in your office who do most of the data entry work.

My Clients: As soon as someone becomes your responsibility you should add them to your My Clients list. ***Only you can do this because it is enabled by your specific login.***



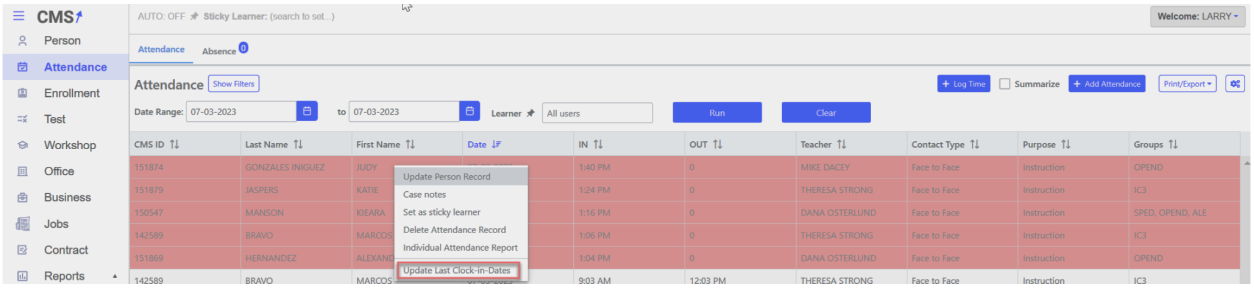
My Students/My Trainees: Your people appearing on these lists is controlled by the following data entry screen:



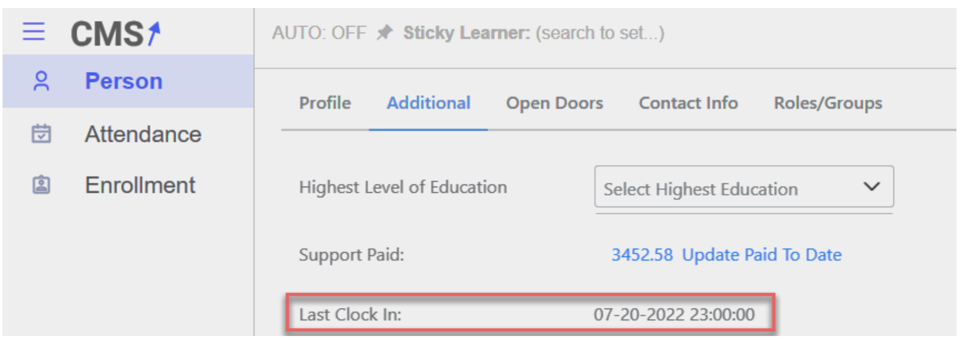
Assigning Trainer/Teacher:

If you are designated here as someone's Trainer then this will put the person on your **My Trainees** list. Likewise if you are a person's teacher then the person will show up on your **My Students** list.

4. What does “Update Last Clock-in Dates” do and why is it important?

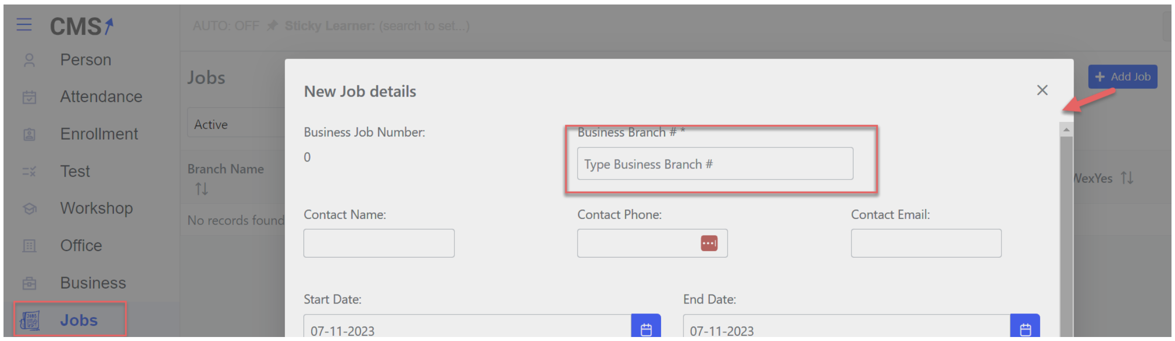


To get to this option you can right-click on ANY attendance record. This function is NOT learner specific and whenever you run it the “Last Clock-in Date” field for all learners is updated with their most recent attendance record. This is important because some reports, like the Roster Report, only include Students who have a <u>clock-in date on or after their registration date</u>. If a new student does not have an attendance record, then you must create one with just a few minutes of time. After you create this attendance record, you must run this option in order to get the student to show up on a Roster Report.

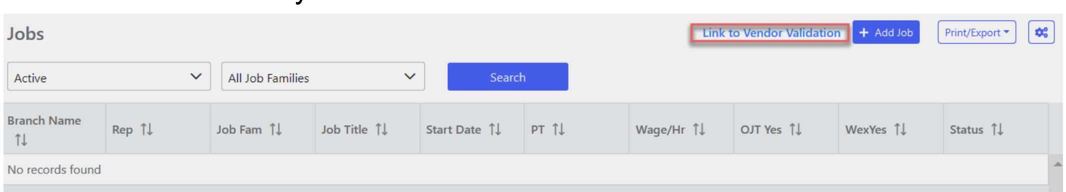


5. **How can I add a position opening if there is no business branch created yet?**

- How do you know there is no business branch record? Go to the Jobs section and enter ***any part*** of the business name in the **Business Branch #** field.



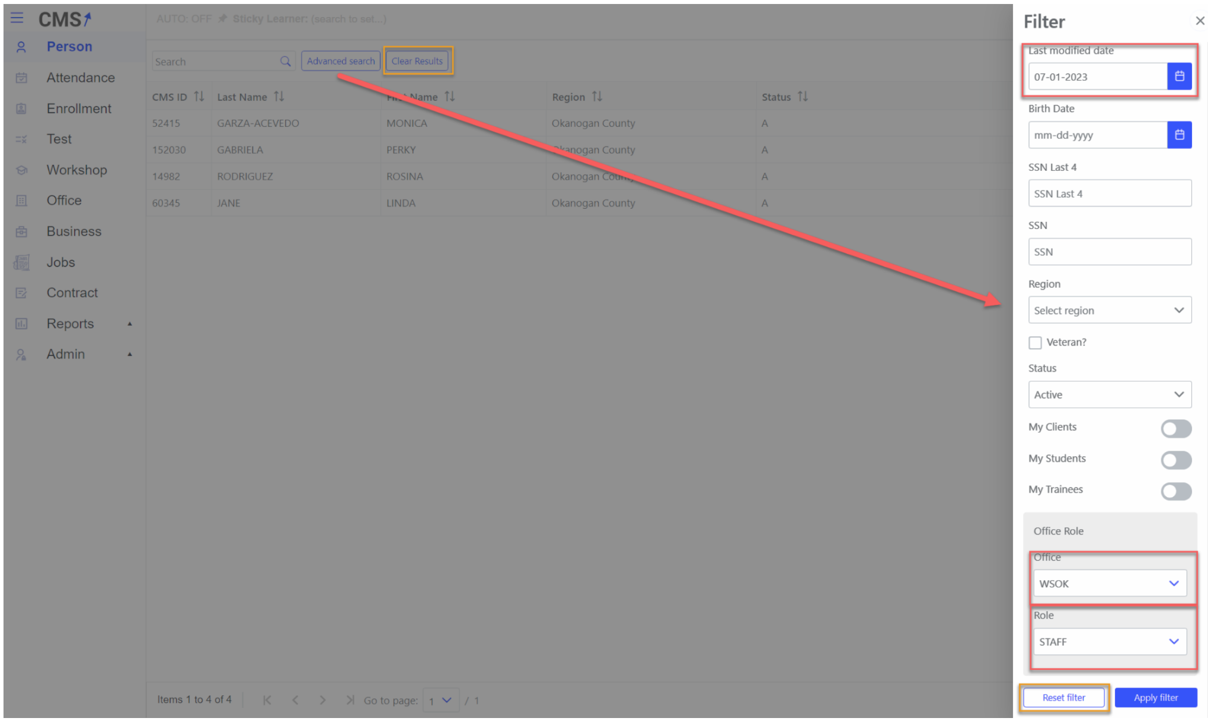
- As soon as you have verified there is no branch record then go directly to the Vendor Validation shared [google sheet]() and enter the basic business information. (notice below the link to Vendor Validation directly in the Jobs tab). A business branch record is usually created within a few hours.



(<u>Note</u>: Why this Vendor Validation step? This employer will probably never become involved in one of our training contracts. This is a good and legitimate question! Here is the answer: We are trying to build a clean and usable Employer/Business database that will enable us to serve them well. "Clean and usable" means that there is one and only one record for every business branch in our service area. Even if the business record is just for listing job openings, it is important to prevent duplicate records as much as possible. The Vendor Validation step helps the database administrator in this regard and it also gives Accounting an early heads up when the business is about to become a vendor. For more information see the section on [Why an Accurate De-Duplicated Business Database is Important]())

- Check the Vendor Validation sheet after a little while for the business branch # that has been assigned. Write down the branch# and then return to the Jobs tab and click **Add Job**. Enter the branch# in the field shown above and the rest of the information asked for on the form. When done click **Save** at the bottom of the form and your new Jobs record should appear in the list.
- If each trainer will promptly follow these steps, then the **Jobs** tab can become a quick and easy single source of truth about position openings.

6. Why would I need to use the Clear Results or Reset Filter buttons?



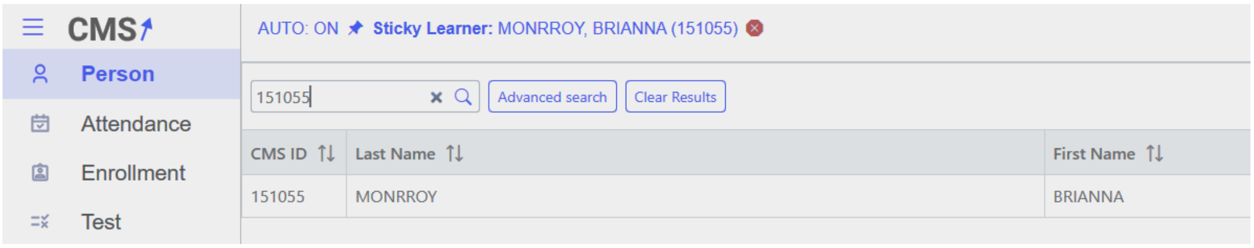
The two buttons boxed in yellow do the same thing. They clear all the selection criteria used in the previous search operation. In the example above, we clicked Advanced Search and entered three selection criteria: **Last Modified Date** = 07-01-2023, **Office** = WSOK and **Role** = STAFF. I was wanting a list of all the Omak staff whose profile was modified in some way since July 1, 2023. When I clicked on the blue **Apply Filter** above, I got the list of 4 records you see above.

Now the *important thing to remember* is that all selection criteria remain in force until you specifically clear them out by clicking the Reset Filter or Clear Results button. If you try to do a new search back on the main screen for all the person records with the last name of "Stewart" **without** clearing the results of the previous search, your search would fail.

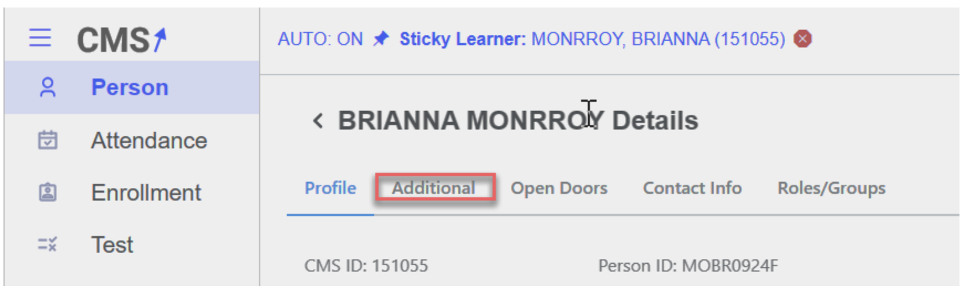
As a skill-building exercise, I encourage you to try your hand at some complex searches (i.e. searches with more than one criteria) of your own, one right after the other. For example, you could get a list of those in each office with Admin roles.

7. How can I find out how much we have paid a participant by funding code?

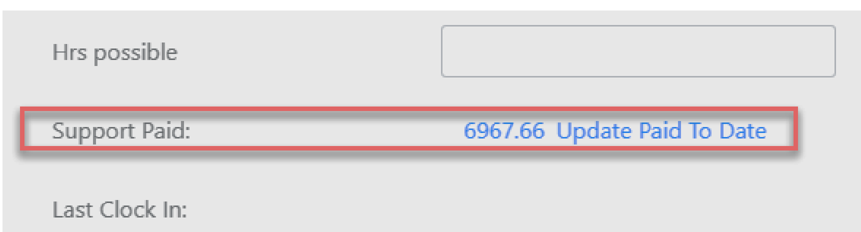
Find the person and open the Profile information tabs. We will use cmsID 151055 as an example:



Double click the row to get access to the Profile information tabs:



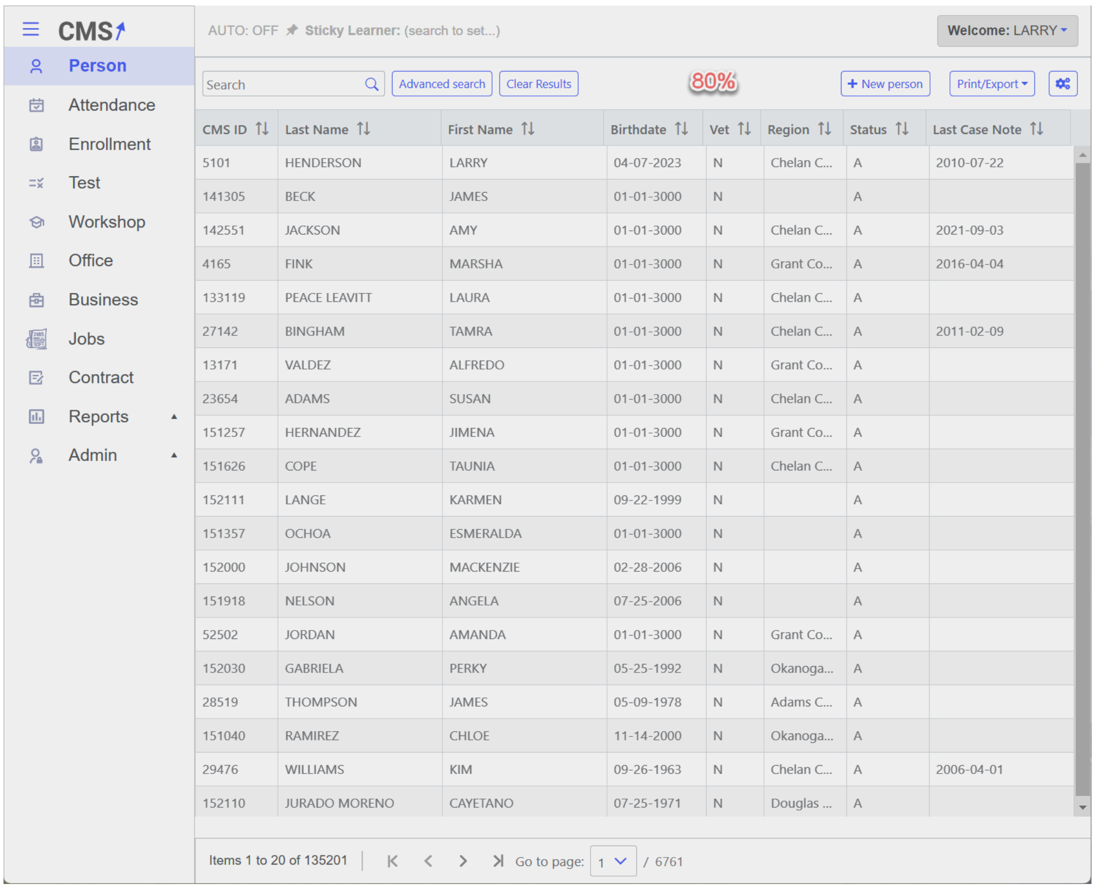
Select the Additional tab and scroll down to the bottom of the form and you will find a link that says **Update Paid To Date**. This will show a small circular wait icon, and if there are payment records it will show a non-zero number as seen in the screenshot below.



Finally, click the actual number (in this case 6967.66) to generate a printable report by GLCode.

8. How do I zoom in so that the words on the screen are larger?

This can be easily accomplished using the Ctrl key with the + and - keys. *It is optimal to set the zoom to 80% because this will show all 20 records of the current page*. If you set the zoom to 90% you will have to use the vertical scroll bar on the right to see the last few records on the page.

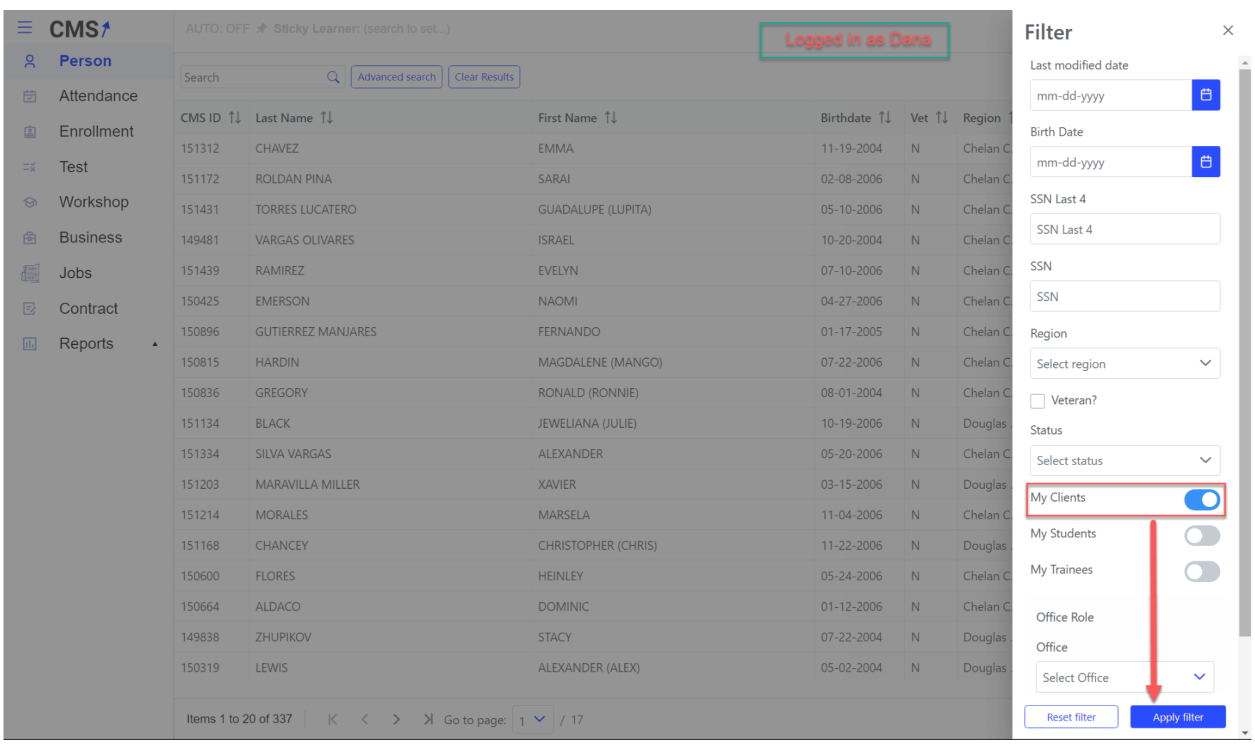


I recommend that you play around with this functionality so that when you need it you will remember to use it. But if you do zoom in, make sure you zoom out to 80% for your regular use.

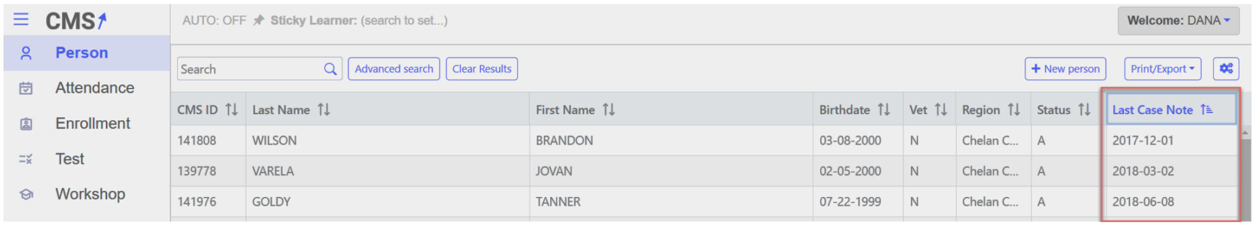
9. How can I maximize the time CMS remains open and ready for use?

If you are actively using CMS, i.e. navigating the main sections, making selections with mouse clicks, or ***even just moving the mouse,*** etc., the 15 minute automatic logout timer will keep resetting. Another thing that triggers an automatic logout is the closing of the browser session that is running CMS. You will always have to login again if you close the browser. So keep the browser tab that is running CMS open all the time. If you need to do something else, make it a habit to frequently return to CMS and just move the mouse ever so slightly. This should minimize the number of times you have to login during the day. Another strategy is to wait until you have a number of CMS tasks to do before you login. I appreciate your patience with this behavior. It is a very necessary security feature, given the amount of protected personal information in CMS.

10. How can I get a list of My Clients sorted by Last Casenote Date?



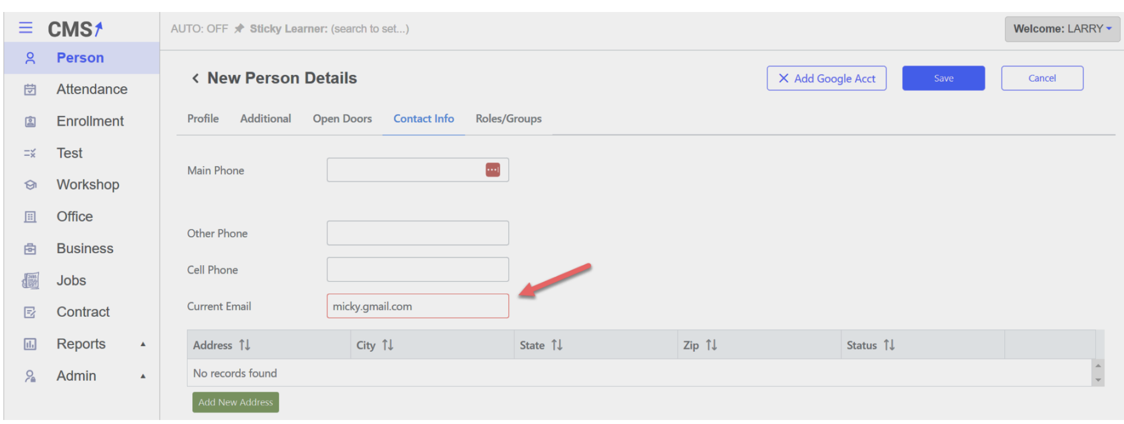
After applying the “My Clients” filter the list is constrained to just Dana’s clients. Notice the ordering of the “Last Casenote” column:



Click on the "Last Case Note" column **header.** The sorting will be reversed:

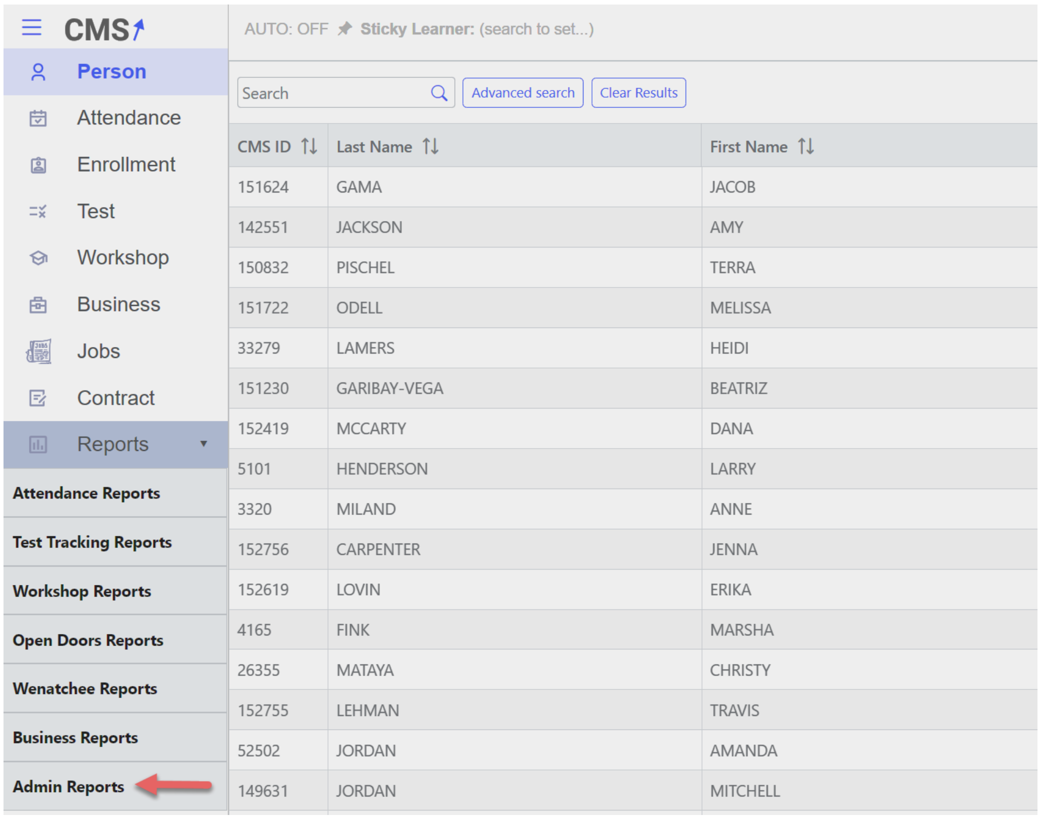
11. What do I do if I get a "Something Went Wrong" error?

The answer for this issue depends somewhat on where you are and what you are doing. For this tip, I am going to assume, as an example, that we are creating a new Person record. This is an activity where many things are going on in the background when you attempt to save a new Person record. If you click and do not get a Save Confirmation message, check first all of the fields in all of the person profile forms and look for a field with a faint red outline around it.

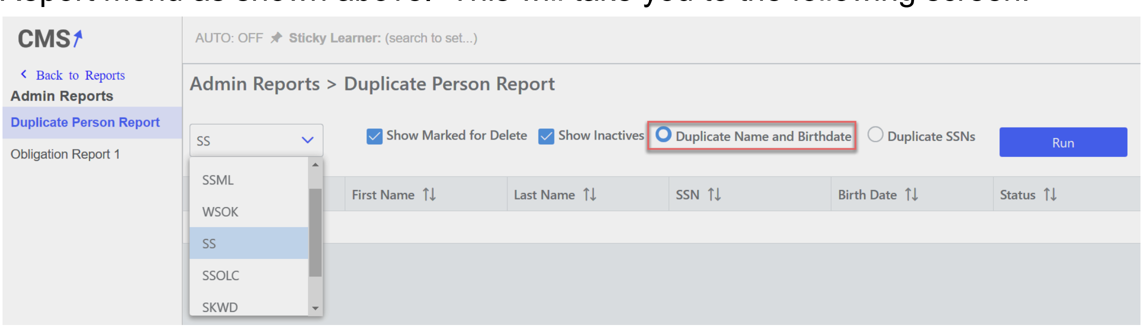


Notice the faint red outline around the field box. I typed in mickey.gmail.com which is not a valid email address. The second "." should have the required "@" symbol. These kinds of errors will cause the save process to fail but **WITHOUT** an error message. I am trying to get the programmers to change that and provide the user with a specific and helpful error message. If you get a “Save confirmation” message **AND** an additional message saying **“Something went wrong**” it is important that you **NOT** try and enter the person's record again. The record creation process was successful but another operation failed generating the “**Something went wrong**” message. Please report these to the Database Administrator as soon as you get a chance.

12. How do I check for duplicate records and delete them?



For all those who create new Person records, it is recommended that you run the Duplicate Persons Report at least once a week. You get to it via the Admin Report menu as shown above. This will take you to the following screen:

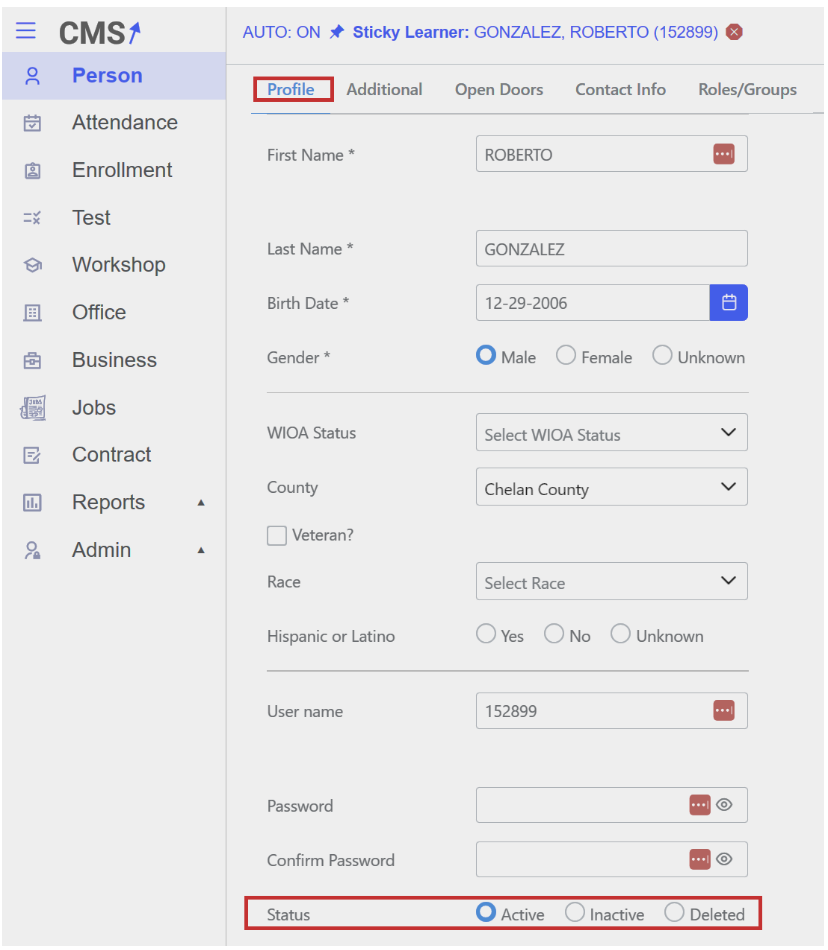


Be sure to select your office and then click Run. If duplicate records are found they will be displayed. **Note**: It is possible for two records to have the same name and birthdate and really be different people! Usually we want to remove the newest record, i.e. the one with the highest cmsID number. Right click on the record you want to remove and select the desired option. Pick the option that says “Move casenotes and workshops and fully delete.”

13. When reporting issues, use clear and accurate terminology.

Use clear and accurate terminology when communicating about CMS. The term "soft enroll" should be replaced by the more accurate "**partial participant record**". There is no enrollment of any kind going on when you create a partial participant record. You create a "partial" so you can "**register**" them in a workshop. This partial record is enough to give you a "**cmsID**", but this is not an enrollment of any kind. I do not know where the term "soft enroll" came from but I am strongly encouraging you to stop using it.

The system does not allow you to delete a participant record after it is created. But it is possible to "flag the record for deletion" by clicking the "Deleted" radio button at the bottom of the profile tab.



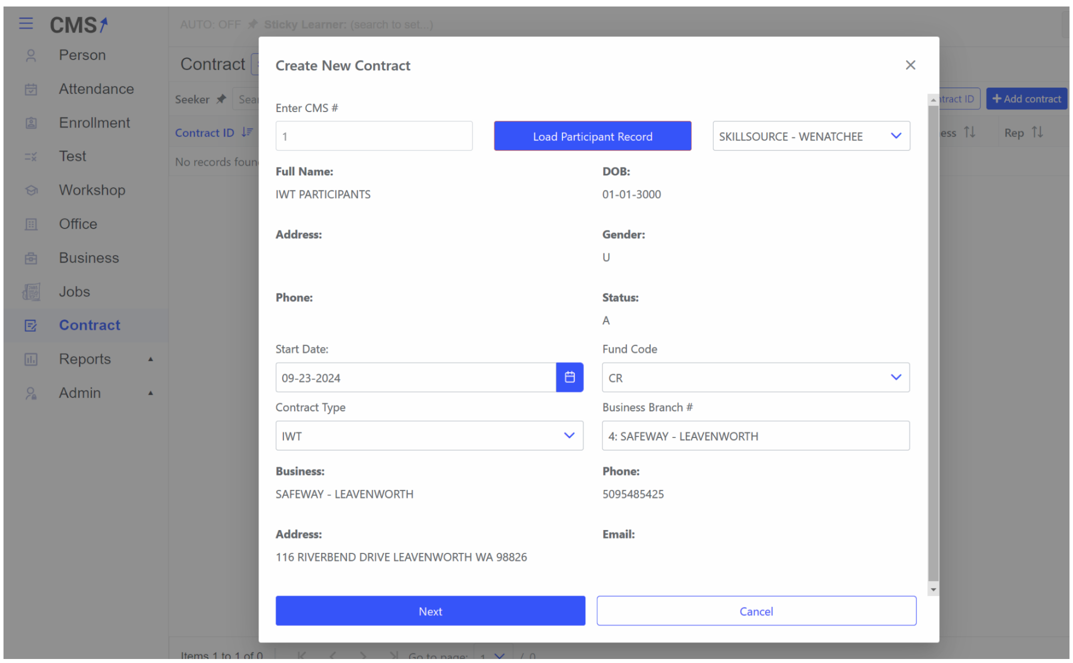
If you select the Inactive or Deleted radio buttons and save the record, **you will not be able to pull up the record again in the usual way**. This makes it appear like the record has been deleted. If this happens you can always select "Advanced Search" and select the "Status" you want to search by. If you suspect that you selected the "Deleted" option you can still find it by status equal to "Deleted". Change the status back to "Active" and all should work as normal.

14. What is the process for requesting new functionality?

Write up your request and send it to the Database Administrator (identified at the beginning of this document). Include a detailed description of the need and how your proposed solution addresses the need.

15. How To Create an IWT (Incumbent Worker Training) contract?

Start the new contract wizard by entering the number **1** for the cmsID# and just follow the wizard from there.

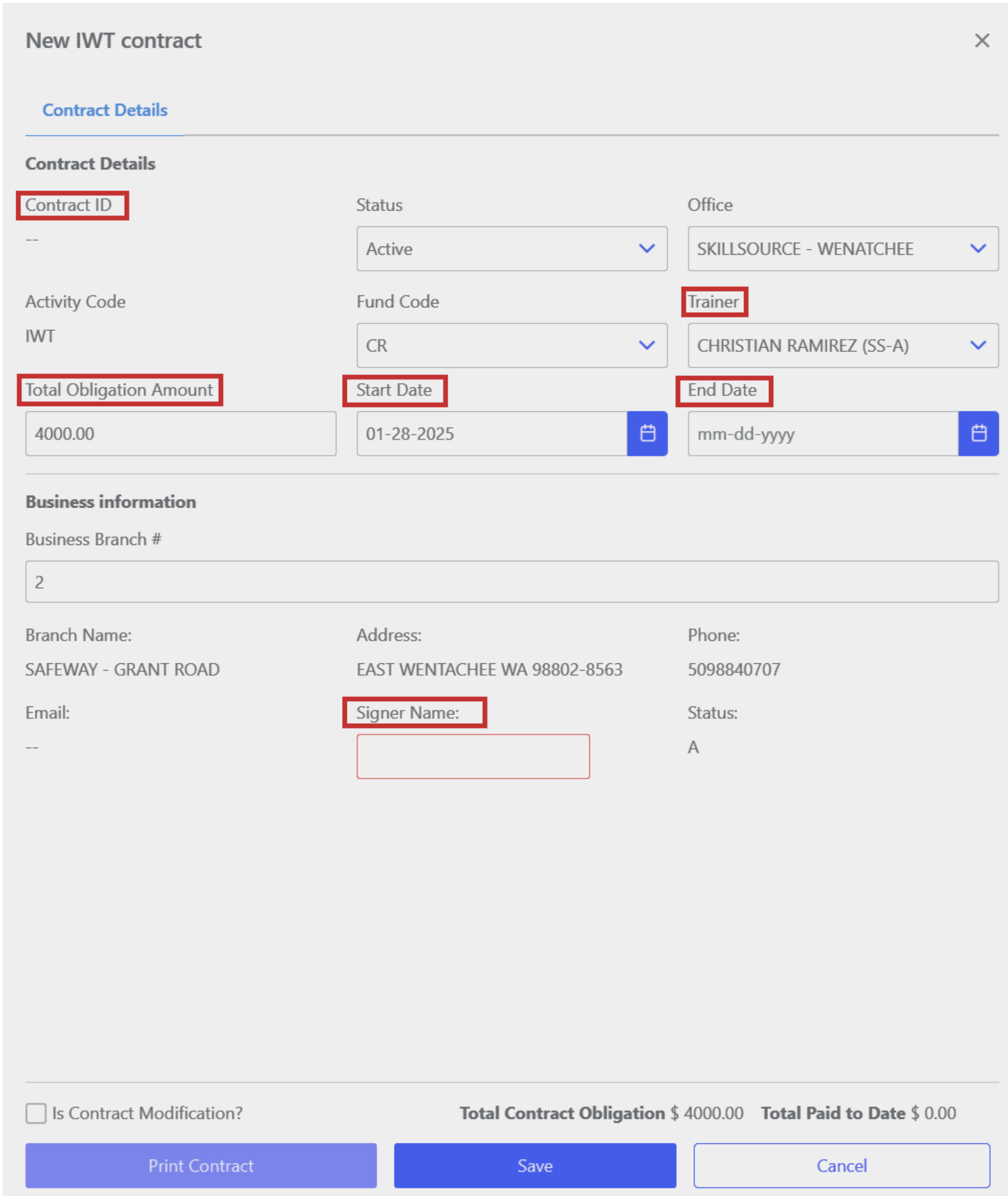


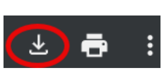
After entering the number "1" for CMS# click the blue button called "Load Participant Record". Notice that the Full Name field shows:

"**IWT PARTICIPANTS**" (IWT's frequently involve more than one participant).

Select the Office from the dropdown. Then enter the Start Date and the Fund Code (either CR or LD). In the Business Branch # field **you can enter any part of the business name and select from a list** if you do not know what the Business Branch # is. If the Business Branch does not exist, go to the Vendor Validation shared Google sheet and enter the basic business data. Several accounting staff monitor this spreadsheet daily and your business branch should be created within hours.

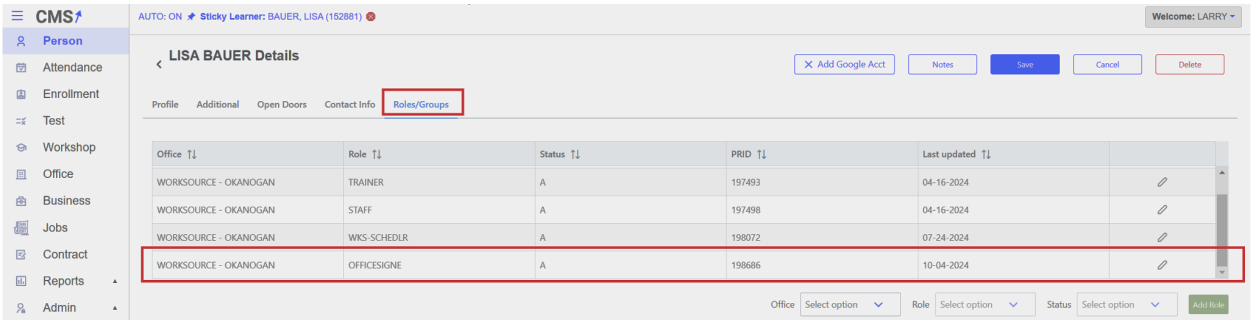
Clicking “Next” will bring up the final page of the IWT contract wizard:



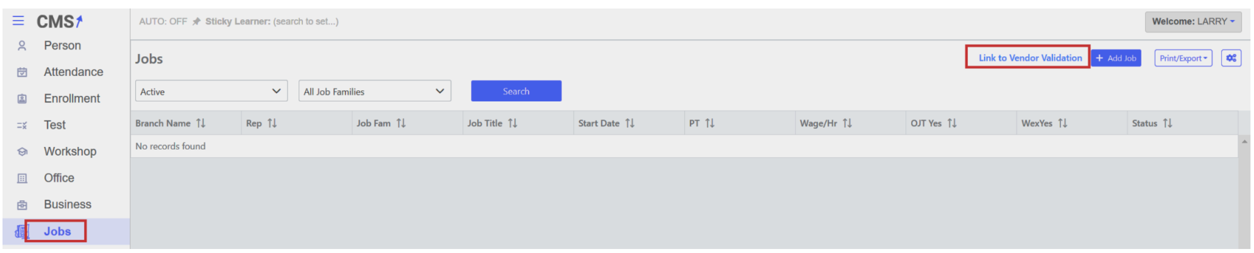
The **Contract ID** is blank because the contract is not saved yet. On this screen you will need to select the **Trainer**, enter the **Total Obligation Amount** and the **Start Date** and **End Date.** The Business **Signer Name** is a <u>required</u> field because it transfers to the printed contract. Click **Save** when that data is entered and the **Print Contract** button will be enabled. When the Contract is displayed do n**ot click Print if you want it saved as a PDF. Rather select the Download option**  **and navigate to where you want it saved as a PDF. Use your chosen naming convention and file storage location, i.e. where your previously created** Application was stored.

16. How do I set the office signer for OJT contracts?

The system looks for the office staff person with an **Active Officesign role**. There is only supposed to be one person with an active Officesign role for each office. You can do an Advanced Search for the person with this role in your office. It is a common problem that when office management personnel changes, this CMS task is forgotten.



17. What is the quickest way to get to Vendor Validation from anywhere in CMS?

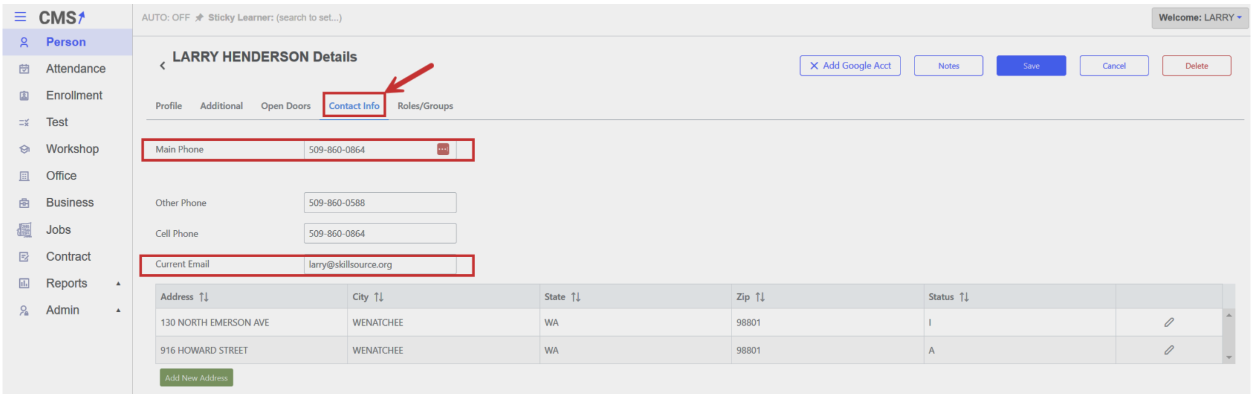


Click on **Jobs** then **Link to Vendor Validation**.

18. How do you set up an Open Doors student?

- Make sure the person has an active **Learner role**
- Make sure the person has an active OPEND **group** assignment.
- Make sure the person has an active school district **Program** assignment.
- In the Additional Information tab make sure the correct **Teacher** is assigned <u>AND</u> that they have a **Register Date** on or near the beginning of the current school year.
- Make sure that they have an **active Enrollment recor**d that has the correct **group** (OPEND) and district **Program** code.
- Make sure they show up on the Roster that is generated for the Teacher, the Group and the Program. <u>NOTE: They will NOT show up on the Roster unless they have a least one attendance record on or after their Register Date.</u>
- Make sure they know how to clock in and out of the Attendance station.

19. How do you update a person's email address and/or phone?

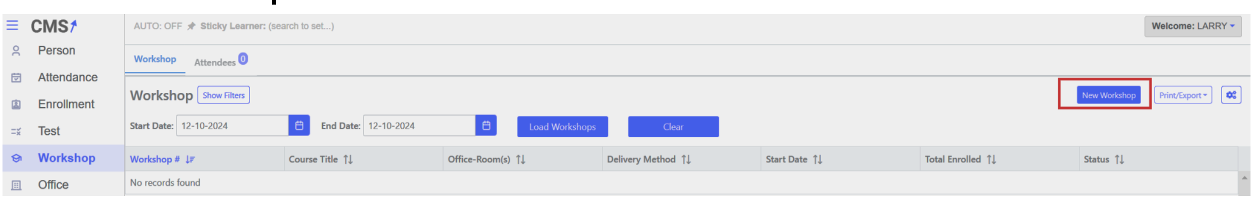


These two pieces of information are critically important for the following reasons:

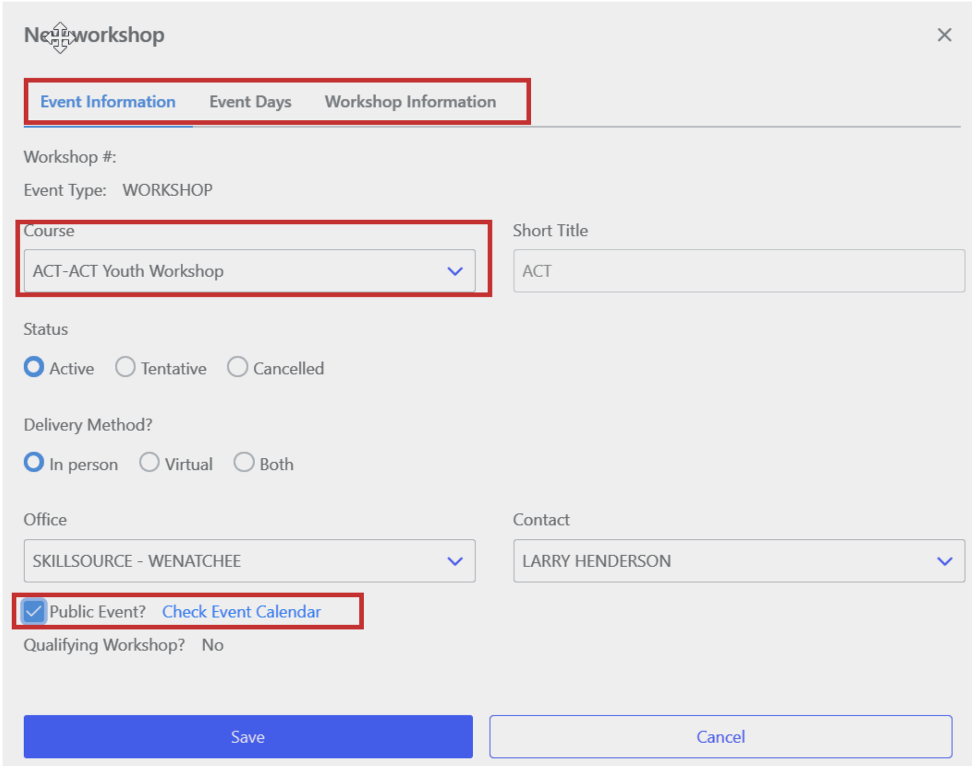
- Communication
- CRM's like LaunchPad use the uniqueness of email addresses to help prevent duplicate records. The same is true of birthdates. All users of CMS need to take meticulous care that these important pieces of information are present and correct.

20. How do you create a multi-day workshop where each day is the same? (Same start/end time, room and instructor)

Click New Workshop

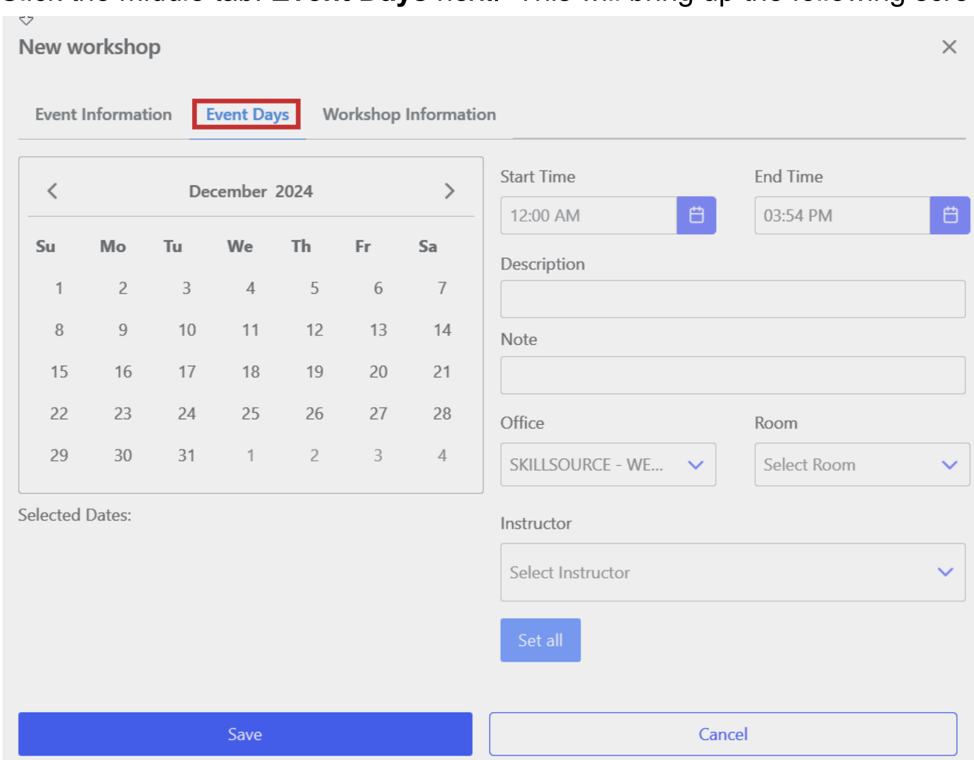


You will be presented with a wizard for creating a new workshop: See next page.

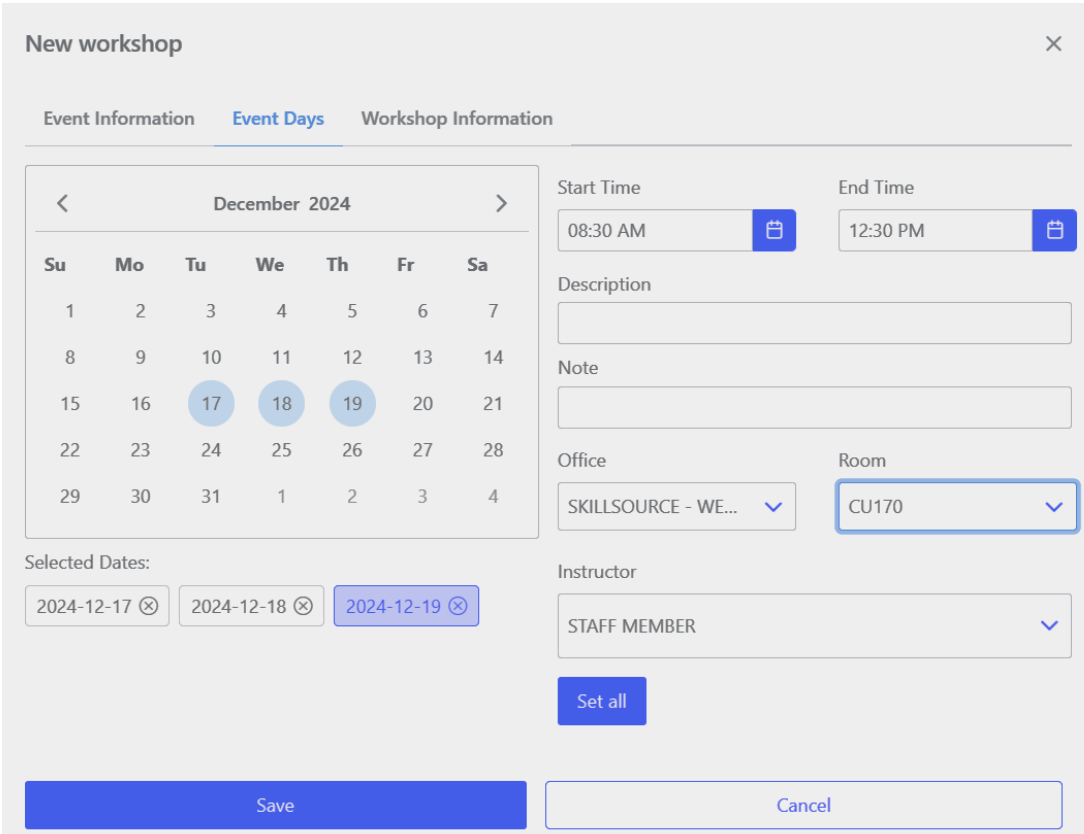


Note the three tabs at the top: **Event Information**, **Event Days** and **Workshop Information**. Do not click **Save** until after you have completed at least the **Event Days** tab. Select the course and what other options apply to the workshop you are creating.

Click the middle tab: **Event Days** next. This will bring up the following screen:



Navigate to the Month in which the first day of the workshop occurs. Let's say that is December 2024. Select the days of the workshop using your mouse. If a date is not selectable, it means that there is a conflict with that date. Notice what happens when you select a date: the selected day is highlighted with a blue circle AND the date is listed below in the **Selected Dates** area.



After selecting the last date, set the **Start Time**, **End Time**, **Room** and **Instructor**, click the **Set All** button. This will make sure all the dates are set to the same selections. When you are finished with all the selections, click **Save**. Corresponding Google Calendar events will be created automatically in the background.

Note: Notice the **Selected Dates** section in the bottom left corner of the screen above. You can delete a day by clicking the little circled x if needed. **After** creating and saving a new workshop you can click on the rectangular button showing the date and edit the settings (Start/End Times, Room or Instructor) for **that day only**. If you make a change like this, make sure you do **not** click the **Set All** button, because this will change all the days of the workshop to those settings.

Technologies Used

Benefits of each technology:

1. **Laravel** (PHP framework): Laravel is a powerful and popular PHP framework that provides a clean and elegant syntax, along with a wide range of built-in features and tools. It offers robust security, efficient routing, easy database management, and supports MVC (Model-View-Controller) architecture, making development faster and more organized.
2. **PHP**: PHP is a widely used server-side scripting language for web development. It has a large community, extensive documentation, and offers excellent compatibility with various platforms and frameworks. PHP integrates seamlessly with databases and provides strong support for web development tasks.
3. **MariaDB** (Relational Database Management System): MariaDB is a popular open-source relational database management system. It is a fork of MySQL and offers high performance, scalability, and security. MariaDB is fully compatible with PHP and provides seamless integration with Laravel, making it an excellent choice for storing and retrieving data in web applications.
4. **REST API** (Representational State Transfer): REST API is a standardized architectural style for building web services. It allows different applications to communicate with each other over HTTP, following a set of rules and conventions. REST APIs are scalable, stateless, and platform-independent, making them ideal for building modern web applications and enabling efficient data exchange between the front-end and back-end.
5. **React/JS** (JavaScript library): React is a widely used JavaScript library for building user interfaces. It offers a component-based architecture, which allows for reusable and modular UI development. React provides efficient rendering, virtual DOM manipulation, and a rich ecosystem of libraries and tools. It seamlessly integrates with Laravel and REST APIs, enabling dynamic and interactive front-end development.
6. **HTML5**: HTML5 is the latest version of the Hypertext Markup Language used for structuring and presenting content on the web. It provides a wide range of new features and APIs that enhance the development of modern web applications. HTML5 supports multimedia elements, canvas for drawing graphics, geolocation, local storage, and more. It works seamlessly with React/JS and REST APIs to create engaging user interfaces and interactive web experiences.

Together, these technologies provide a robust and efficient stack for web development. Laravel and PHP handle server-side logic, MariaDB manages the database, REST APIs facilitate communication between the front-end and back-end, and React/JS with HTML5 create dynamic and responsive user interfaces. This combination offers a powerful foundation for building scalable, secure, and feature-rich web applications.

Hosted on AWS (Amazon Web Services):

1. **Scalability**: AWS provides scalable infrastructure services that allow you to easily handle varying levels of traffic and user demand. You can use services like Amazon EC2 (Elastic Compute Cloud) to scale your PHP and Laravel applications horizontally or vertically based on your needs. This ensures that your application remains responsive and performs well under heavy loads.

2. **Reliability and Availability**: AWS offers highly reliable and available services that help ensure your web application stays up and running. You can leverage AWS's managed services like Amazon RDS (Relational Database Service) to host your MariaDB database, which provides ***automated backups,*** automated software patching, and multi-Availability Zone (AZ) deployments for high availability. Additionally, AWS provides services like Amazon S3 (Simple Storage Service) to store and serve static assets like HTML, CSS, and JavaScript files reliably.

3. **Security**: AWS provides robust security features to protect your applications and data. You can implement security best practices such as using Amazon VPC (Virtual Private Cloud) to isolate your application resources, configuring security groups and network ACLs (Access Control Lists) to control inbound and outbound traffic, and using AWS Identity and Access Management (IAM) to manage user access and permissions. AWS also offers services like AWS WAF ***(Web Application Firewall)*** to protect your application from common web attacks.

4. **Elasticity**: With AWS, you can easily handle variable workloads by leveraging services like AWS Auto Scaling. This allows you to automatically scale your application resources based on predefined rules, ensuring that you have the right amount of compute resources available at all times. This elasticity helps optimize costs by scaling resources up during peak demand and down during periods of lower traffic.

5. **Managed Services**: AWS offers a wide range of managed services that can simplify your development and deployment process. For example, you can use AWS Elastic Beanstalk to easily deploy and manage your PHP and Laravel applications without worrying about the underlying infrastructure. AWS Lambda enables you to run serverless functions for specific tasks, which can be helpful for implementing lightweight APIs or performing serverless computations.

6. **Integration with AWS Services**: AWS provides a rich ecosystem of services that can be integrated with your Laravel, PHP, and React/JS applications. For example, you can leverage services like Amazon SNS (Simple Notification Service) or Amazon SQS (Simple Queue Service) for event-driven communication or message queuing, and Amazon SES (***Simple Email Service***) for managing automated emails.

7. **Monitoring and Analytics**: AWS offers various monitoring and analytics tools to help you gain insights into your application's performance and user behavior. You can use services like Amazon CloudWatch for monitoring application metrics, AWS X-Ray for tracing and debugging requests, and Amazon Kinesis for real-time data streaming and analytics.

By combining Laravel, PHP, MariaDB, REST API, React/JS, and HTML5 with the capabilities provided by AWS, you can build highly scalable, reliable, secure, and cost-effective web applications. AWS's extensive suite of services and tools empowers developers to focus on application development while leveraging managed services for infrastructure, security, monitoring, and other critical aspects of the development lifecycle.

Glossary

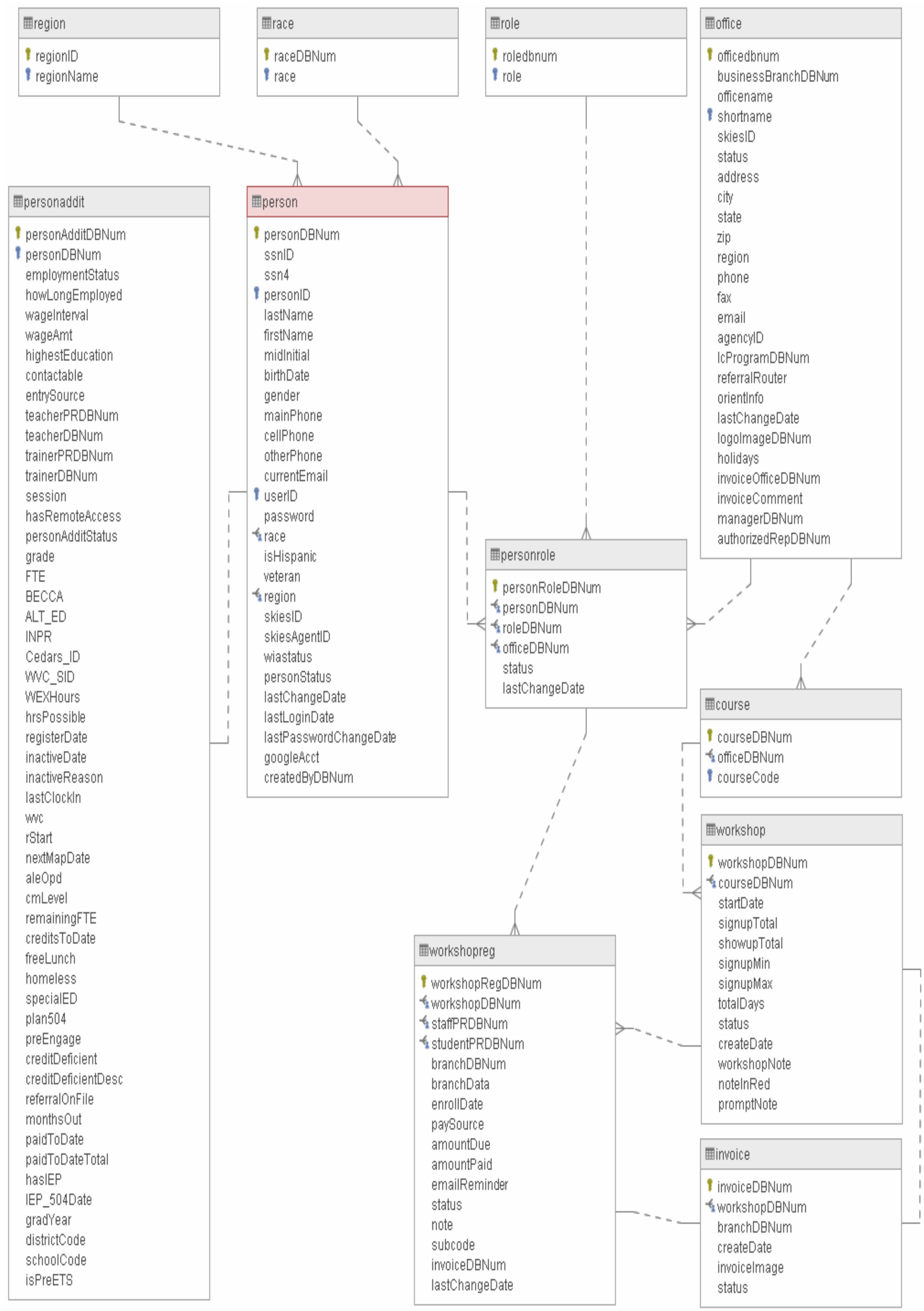
- **Admin** - Administrative functions related to the management of a CMS or organization.
- **Attendance** - The record of presence or absence of individuals for scheduled activities or events.
- **Attendance Summary Report** - A report that details the attendance records for a specific period or event.
- **Business** - An entity involved in commercial, industrial, or professional activities.
- **Business Branch** - A subsidiary part of a business that operates semi-independently.
- **CASAS Skill Gain Report** - A report detailing the skill gains measured by CASAS assessments over a specific period.
- **CMS** (Customer Management System) - A software that helps businesses manage customer data, interactions, and processes related to customer care, thereby improving customer satisfaction and retention. Today this kind of system is called a CRM.
- **cmsID** - Unique number generated by the database for each person
- **Contracts** - Legally binding agreements between two or more parties.
- **Contract Printing** - The ability to print a physical copy of a digital contract.
- **Contract Template Editing** - The modification of existing templates used in contract creation within a CMS.
- **Contract Templates Administration** - Management of the various templates used for creating contracts within a system.
- **Creating a New Staff User** - The process of adding a new user to the system with specified roles and permissions.
- **Creating a New Workshop** - The process of organizing and setting up a new educational or training session known as a workshop.
- **Current Job Openings Grid** - A display of all available job positions currently open within an organization.
- **Deactivating A Staff User** - The process of removing a user's active status within the system, preventing them from logging in or accessing system resources.
- **Drop Codes** - Codes used to categorize or indicate reasons why a service or enrollment was dropped or terminated.
- **EdLevel Ranges** - Designations used to categorize educational levels or achievements within a system.
- **Enrollment** - The process of registering or entering someone into a system or service.
- **Enrollment Entry/Edit Screen** - The user interface where enrollment details are entered or modified.
- **Entity Relationship Diagram (ERD)** - A graphical representation of entities and their relationships to each other, typically used in database design.
- **Excuses** - Predefined or user-defined reasons for absences or other exceptions within a system.
- **Exclude Codes** - Specific codes used to exclude certain data or entries from reports or queries within a system.
- **Finding Contracts** - The process of searching and retrieving contract details within a system.
- **Finding Workshops** - The method by which users locate scheduled or available workshops within a system.
- **FTE Enrollment Report** - A report detailing full-time equivalent student enrollments.

- **Fund** - Financial resources designated for specific purposes within an organization, managed through the CMS.
- **Groups** - Defined sets of users or entities within a system, grouped by common criteria.
- **HSE/Diploma Report** - A report documenting high school equivalency or diploma attainment.
- **Jobs** - Employment positions within an organization.
- **List of Job Families** - A categorized list of jobs grouped by similar occupational fields or functions.
- **Login Screen** - The interface where users enter credentials to access a system.
- **Office** - A designated area within an organization where administrative tasks are carried out.
- **Office Courses** - Educational or training courses administered at or by the office.
- **Office Detail** - Specific information regarding an office's operations, structure, or staff.
- **Office Rooms** - Specific rooms designated for office use within an organization.
- **Office Staff** - Employees assigned to work within a specific office.
- **Outcome Entry/Edit Screen** - The interface for entering or editing the results or outcomes associated with a student or group.
- **Participant Record** - A complete set of information about each person
- **Partial Participant Record** - The minimum pieces of information required to generate a cmsID.
- **Person Search** - A feature that allows users to look up individual records within a system.
- **Programs** - Organized sets of activities or curricula offered through an organization, managed via the CMS.
- **Record List Data Grid** - A table view that displays a list of records from a database.
- **Recording an Absence** - The act of documenting when a student or employee does not attend a scheduled session or day.
- **Reports** - Documents that collate and summarize data for analysis and decision-making.
- **Retention/Credential Report** - A report focusing on the retention rates and credentials obtained by students or participants.
- **Roles** - Designations within a system that define user permissions and responsibilities.
- **Roles Maintenance Screen** - An interface for managing and assigning roles within the CMS.
- **Roster Repor**t - A report listing all participants or students enrolled in a particular program or class.
- **School Days** - Specific days designated as operational or instructional within an educational institution.
- **Student Absence Report** - A report detailing the absences of students within an educational program or institution. This report can only be run on Fridays.
- **Student Clock-In Screen** - A digital interface used by students to mark their arrival and departure times.
- **Test Codes** - Codes used to categorize or identify specific tests or assessments within a system.
- **Upcoming Birthdays Report** - A report listing the upcoming birthdays of individuals within the organization or system.
- Using **Excel Pivot Tables** to Enhance CMS Reports - Utilizing Excel's pivot table feature to better analyze and visualize data from CMS reports.

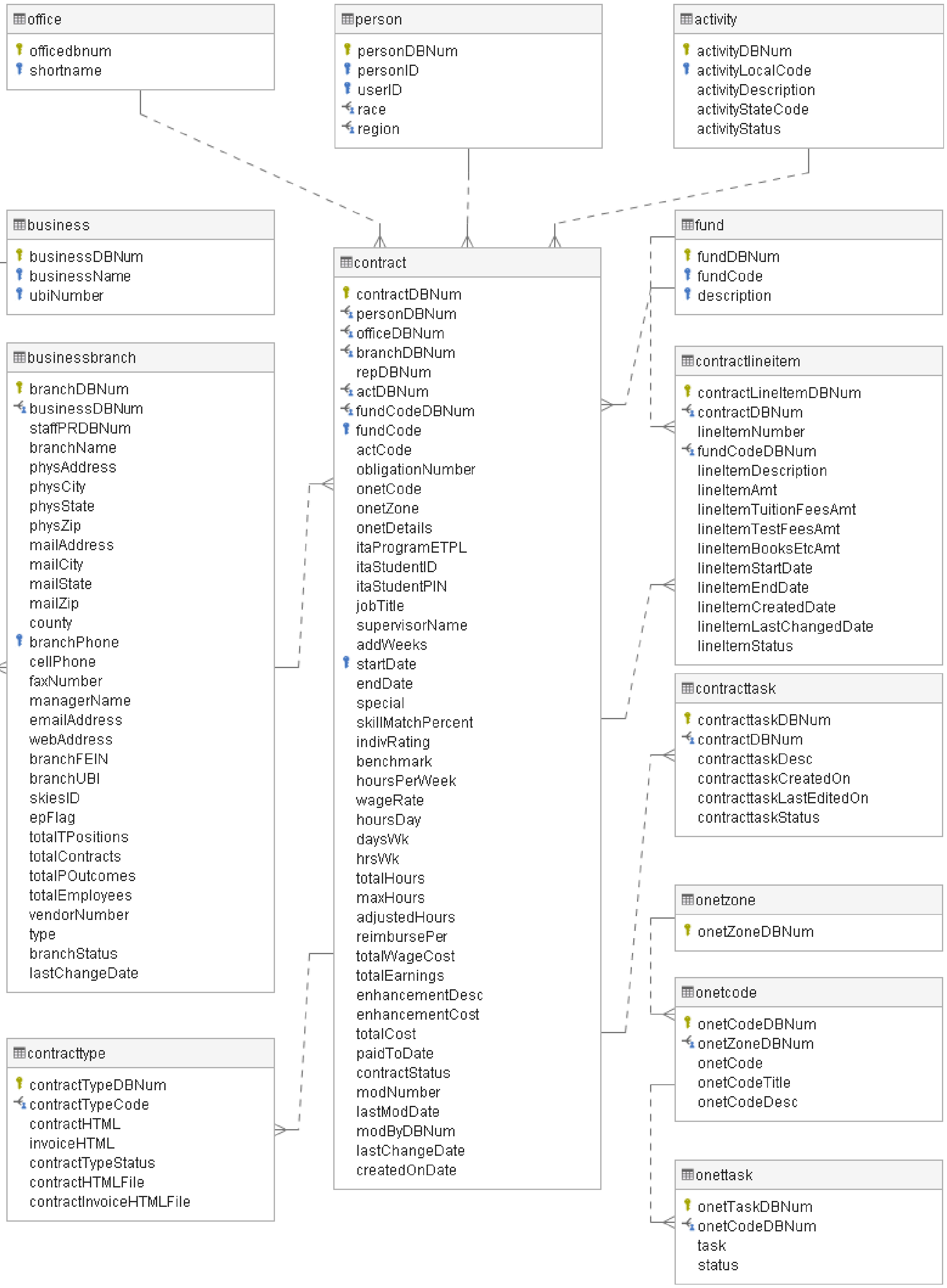
- **Wizard** - In the context of software, a **wizard** is a user interface feature that guides users step-by-step through a process or task. Wizards are typically used in software applications to simplify complex or unfamiliar tasks by breaking them down into smaller, manageable steps. They often involve a sequence of screens or dialogs, each prompting the user to provide information, make choices, or review settings before moving on to the next step. In CMS, the Contracting System is wizard driven.
- **Workshop** - A brief intensive educational program for a small group which focuses on techniques and skills in a particular field.
- **Workshop Duplication Feature** - A system capability that allows users to replicate existing workshops for new sessions.

Entity Relationship Diagram (ERD)

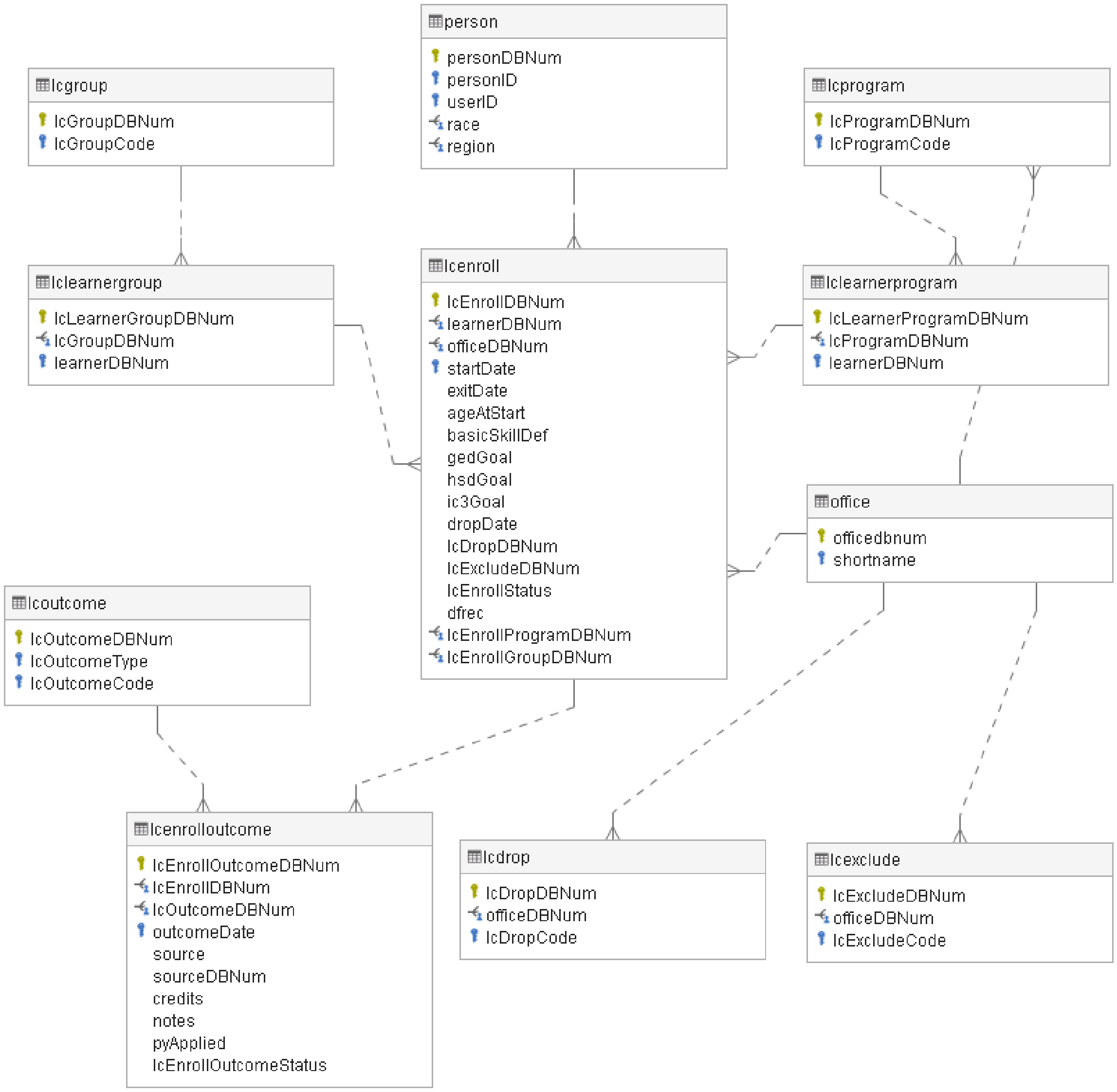
Person and Workshop Information



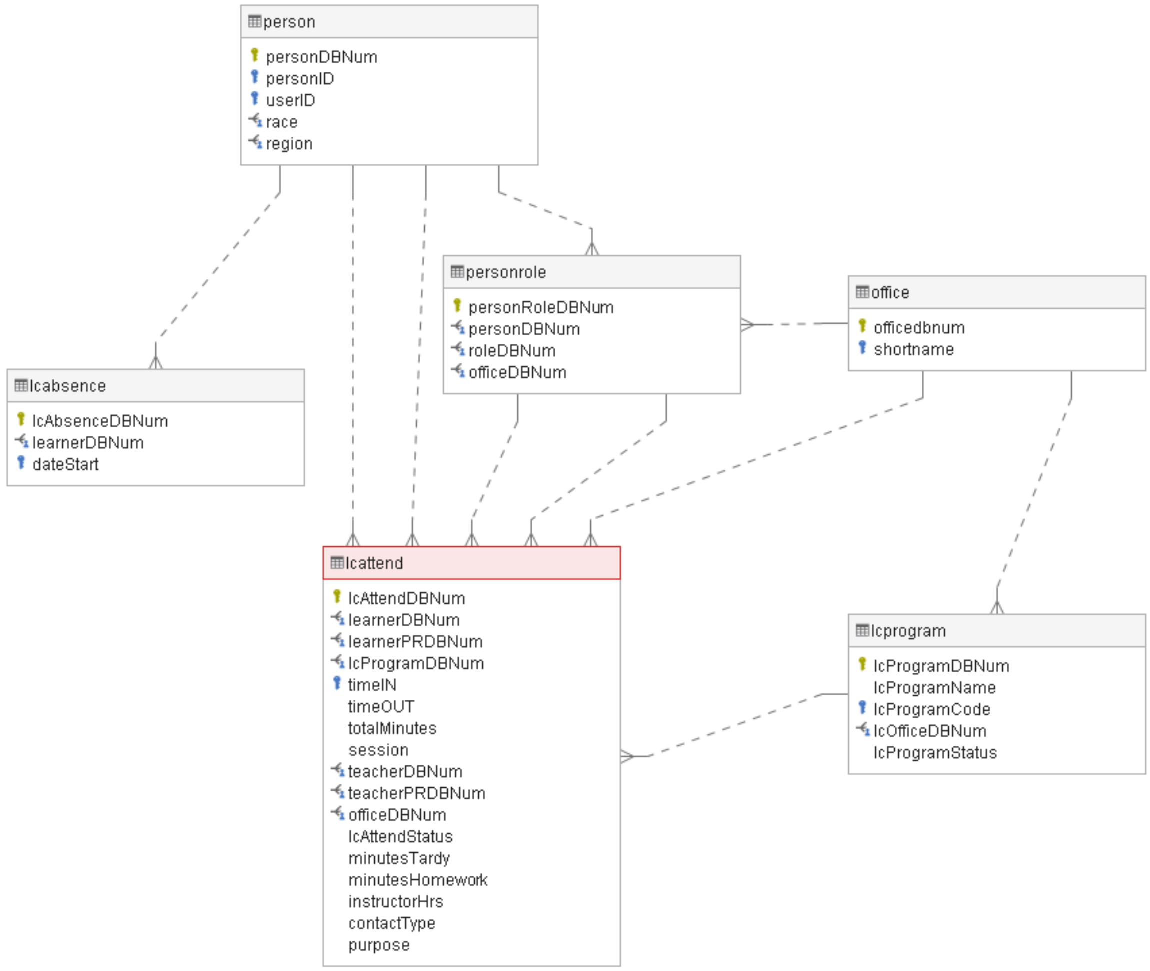
ERD - Contracting System



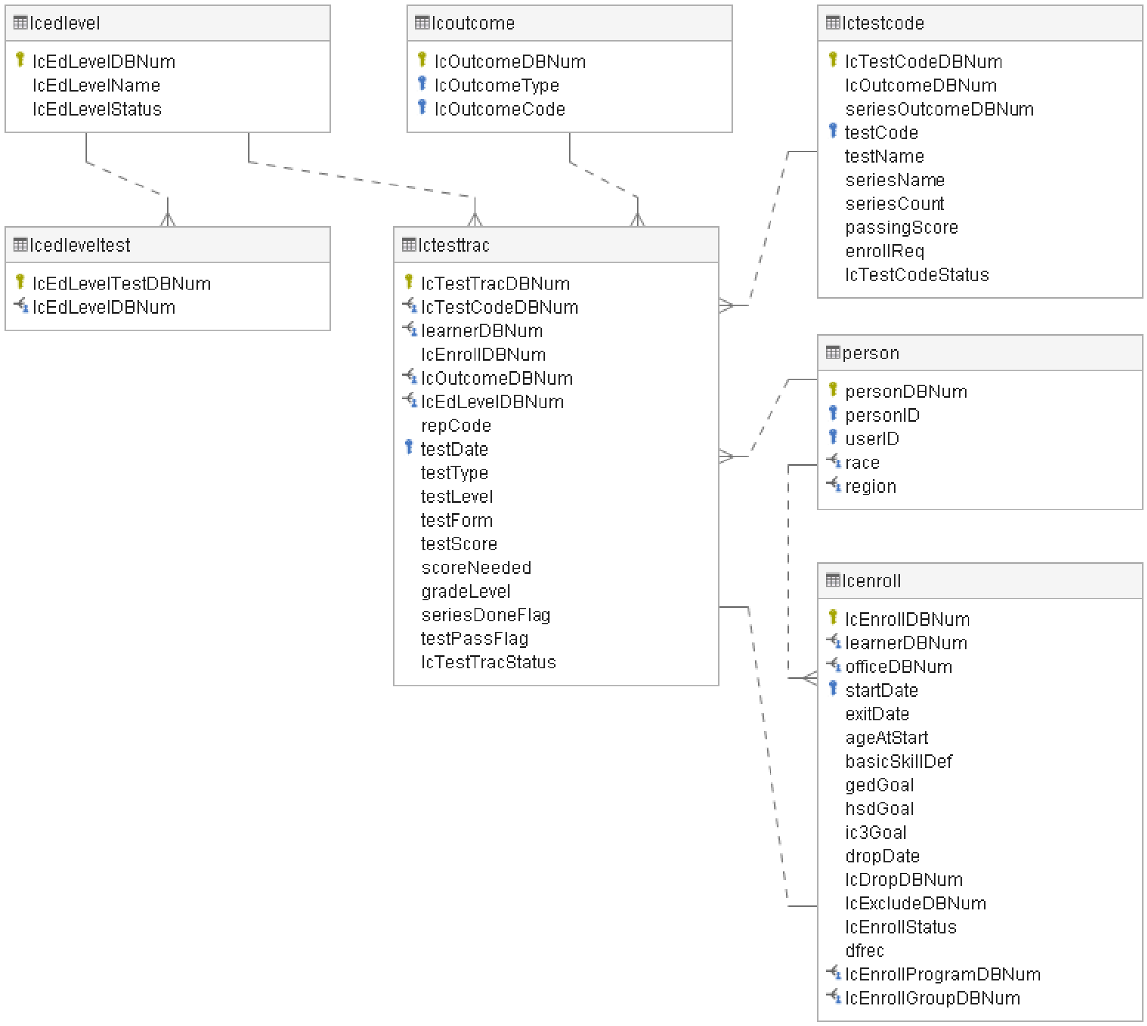
ERD - Enrollment



ERD - Attendance



ERD - Testing



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seriesOutcomeDBNum
testCode
testName
seriesName
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passingScore
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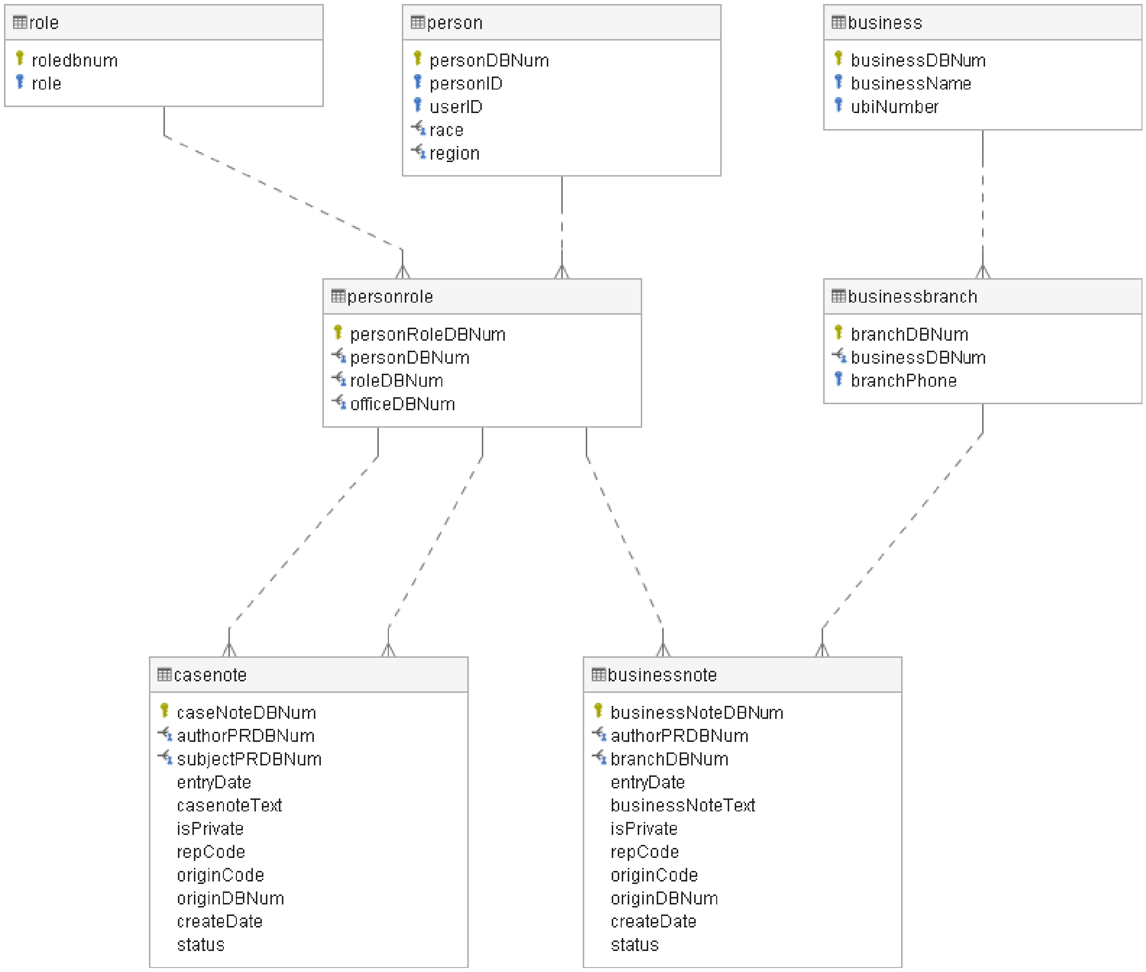
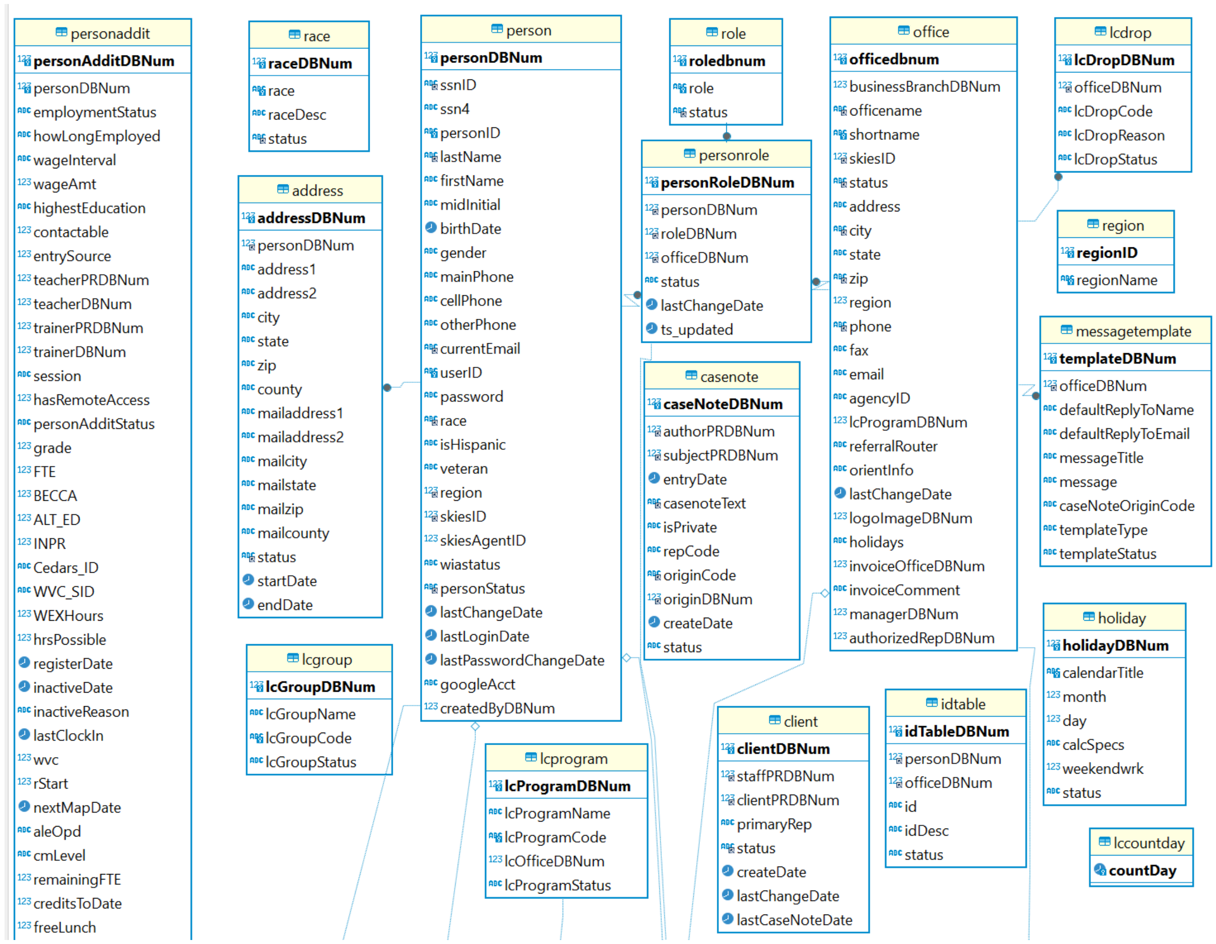
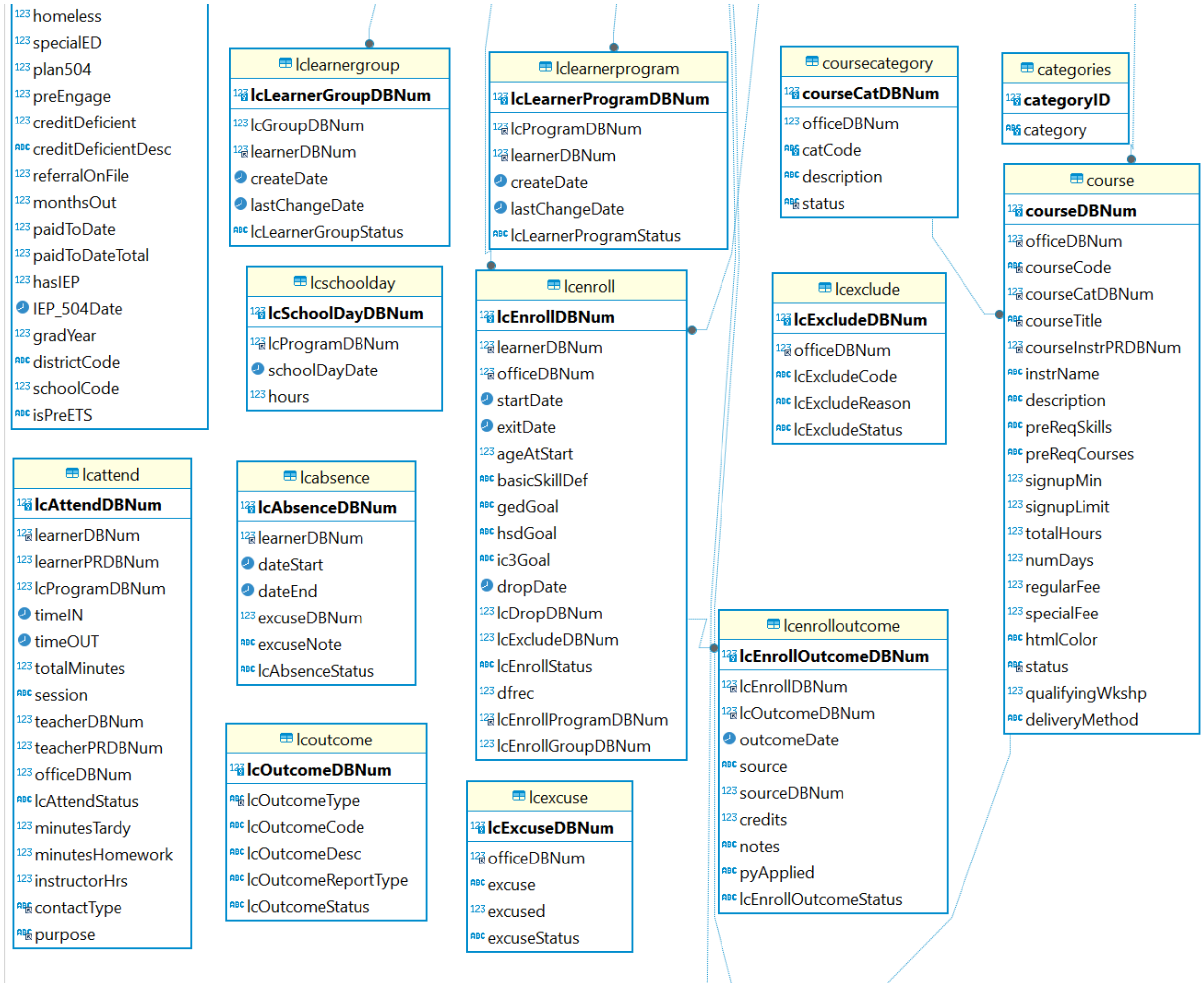
lctesttrac
lcTestTracDBNum
lcTestCodeDBNum
learnerDBNum
lcEnrollDBNum
lcOutcomeDBNum
lcEdLevelDBNum
repCode
testDate
testType
testLevel
testForm
testScore
scoreNeeded
gradeLevel
seriesDoneFlag
testPassFlag
lcTestTracStatus
person
personDBNum
personID
userID
race
region
lcenroll
lcEnrollDBNum
learnerDBNum
officeDBNum
startDate
exitDate
ageAtStart
basicSkillDef
gedGoal
hsdGoal
ic3Goal
dropDate
lcDropDBNum
lcExcludeDBNum
lcEnrollStatus
dfrec
lcEnrollProgramDBNum
lcEnrollGroupDBNum

ERD - Casenotes (participant and employer)



Updated ERD As Of Jun 24, 2024

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signupMin
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totalHours
numDays
regularFee
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schoolDayDate
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lcEnrollDBNum
learnerDBNum
officeDBNum
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ageAtStart
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gedGoal
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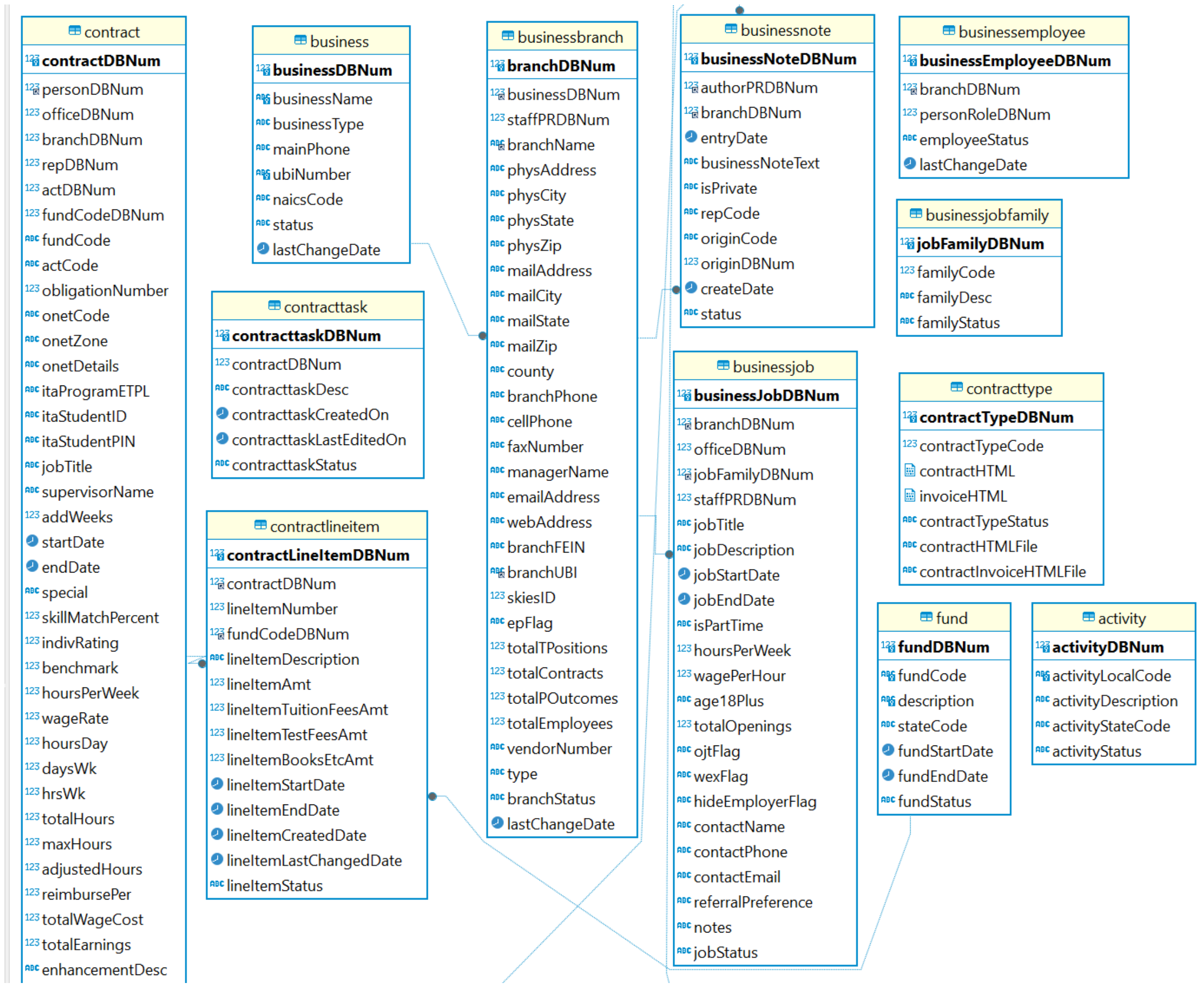

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personDBNum
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branchDBNum
repDBNum
actDBNum
fundCodeDBNum
fundCode
actCode
obligationNumber
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onetDetails
itaProgramETPL
itaStudentID
itaStudentPIN
jobTitle
supervisorName
addWeeks
startDate
endDate
special
skillMatchPercent
indivRating
benchmark
hoursPerWeek
wageRate
hoursDay
daysWk
hrsWk
totalHours
maxHours
adjustedHours
reimbursePer
totalWageCost
totalEarnings
enhancementDesc
business
businessDBNum
businessName
businessType
mainPhone
ubiNumber
naicsCode
status
lastChangeDate
contracttask
contracttaskDBNum
contractDBNum
contracttaskDesc
contracttaskCreatedOn
contracttaskLastEditedOn
contracttaskStatus
contractlineitem
contractLineItemDBNum
contractDBNum
lineItemNumber
fundCodeDBNum
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lineItemAmt
lineItemTuitionFeesAmt
lineItemTestFeesAmt
lineItemBooksEtcAmt
lineItemStartDate
lineItemEndDate
lineItemCreatedDate
lineItemLastChangedDate
lineItemStatus
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branchDBNum
businessDBNum
staffPRDBNum
branchName
physAddress
physCity
physState
physZip
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mailState
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county
branchPhone
cellPhone
faxNumber
managerName
emailAddress
webAddress
branchFEIN
branchUBI
skiesID
epFlag
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totalPOutcomes
totalEmployees
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type
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authorPRDBNum
branchDBNum
entryDate
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isPrivate
repCode
originCode
originDBNum
createDate
status
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businessJobDBNum
branchDBNum
officeDBNum
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staffPRDBNum
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wagePerHour
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wexFlag
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personRoleDBNum
employeeStatus
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jobFamilyDBNum
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familyStatus
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invoiceHTML
contractTypeStatus
contractHTMLFile
contractInvoiceHTMLFile
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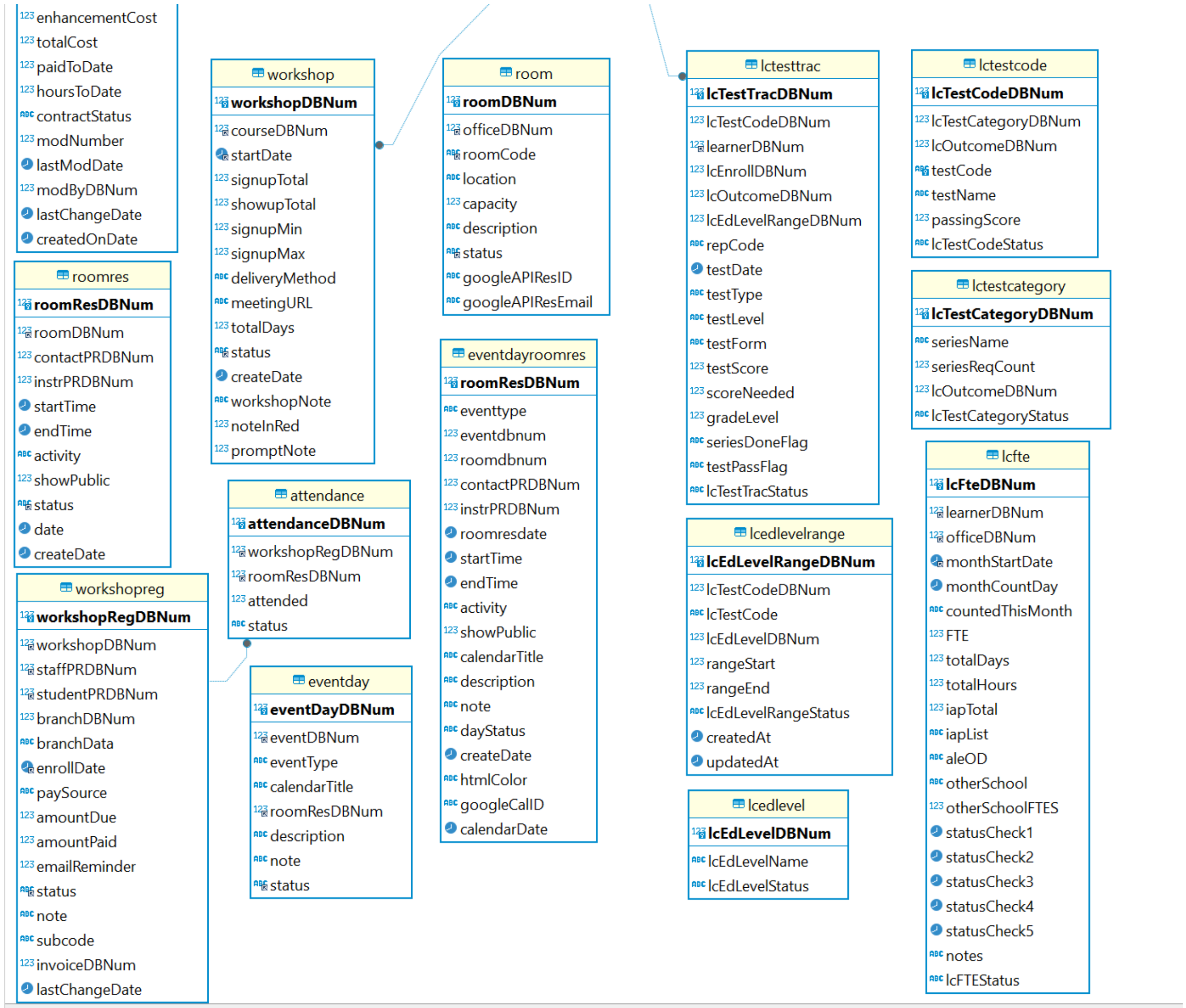
activityStatus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contactPRDBNum
instrPRDBNum
startTime
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status
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studentPRDBNum
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amountPaid
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status
note
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workshop
workshopDBNum
courseDBNum
startDate
signupTotal
showupTotal
signupMin
signupMax
deliveryMethod
meetingURL
totalDays
status
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workshopNote
noteInRed
promptNote
attendance
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workshopRegDBNum
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roomResDBNum
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status
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officeDBNum
roomCode
location
capacity
description
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eventtype
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roomdbnum
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endTime
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lcTestCodeDBNum
learnerDBNum
lcEnrollDBNum
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officeDBNum
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totalDays
totalHours
iapTotal
iapList
aleOD
otherSchool
otherSchoolFTES
statusCheck1
statusCheck2
statusCheck3
statusCheck4
statusCheck5
notes
lcFTEStatus

CMS SQL Table and Field Names

1. Person Table (Parent Table)

```
CREATE TABLE `person` (
  `personDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `ssnID` varchar(50) DEFAULT NULL,
  `ssn4` varchar(50) DEFAULT NULL,
  `personID` varchar(10) NOT NULL DEFAULT '',
  `lastName` varchar(50) NOT NULL DEFAULT '',
  `firstName` varchar(50) NOT NULL DEFAULT '',
  `midInitial` char(1) NOT NULL DEFAULT '',
  `birthDate` date NOT NULL DEFAULT '3000-01-01',
  `gender` char(1) NOT NULL DEFAULT '',
  `mainPhone` varchar(15) NOT NULL DEFAULT '',
  `cellPhone` varchar(15) NOT NULL DEFAULT '',
  `otherPhone` varchar(15) NOT NULL DEFAULT '',
  `currentEmail` varchar(120) NOT NULL DEFAULT '',
  `userID` varchar(120) NOT NULL DEFAULT '',
  `password` varchar(50) NOT NULL DEFAULT '',
  `race` varchar(25) NOT NULL DEFAULT '',
  `isHispanic` char(1) DEFAULT NULL,
  `veteran` char(1) NOT NULL DEFAULT '',
  `region` int(11) NOT NULL DEFAULT 0,
  `skiesID` int(11) NOT NULL DEFAULT 0,
  `wiastatus` char(1) NOT NULL DEFAULT '',
  `personStatus` char(1) NOT NULL DEFAULT 'A',
  `lastChangeDate` timestamp NOT NULL DEFAULT current_timestamp() ON UPDATE current_timestamp(),
  `lastLoginDate` timestamp NOT NULL DEFAULT '0000-00-00 00:00:00',
  `lastPasswordChangeDate` timestamp NOT NULL DEFAULT '0000-00-00 00:00:00',
  PRIMARY KEY (`personDBNum`),
  UNIQUE KEY `personID` (`personID`),
  UNIQUE KEY `userID` (`userID`),
  KEY `statusIndex` (`personStatus`),
  KEY `lastNameIndex` (`lastName`)
) ENGINE=InnoDB AUTO_INCREMENT=153491 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

personaddit (one to one with Person)

```
CREATE TABLE `personaddit` (
  `personAdditDBNum` int(10) unsigned NOT NULL AUTO_INCREMENT,
  `personDBNum` int(11) DEFAULT NULL,
  `employmentStatus` char(1) NOT NULL DEFAULT '',
  `howLongEmployed` varchar(25) NOT NULL DEFAULT '',
  `wageInterval` varchar(7) NOT NULL DEFAULT '',
  `wageAmt` float NOT NULL DEFAULT 0,
  `highestEducation` varchar(25) NOT NULL DEFAULT '',
  `contactable` tinyint(1) NOT NULL DEFAULT 0,
  `entrySource` int(10) unsigned NOT NULL DEFAULT 0,
  `teacherPRDBNum` int(11) NOT NULL DEFAULT 0,
  `teacherDBNum` int(10) unsigned NOT NULL DEFAULT 0,
  `trainerPRDBNum` int(10) unsigned NOT NULL DEFAULT 0,
  `trainerDBNum` int(10) unsigned NOT NULL DEFAULT 0,
  `session` char(1) NOT NULL DEFAULT '',
  `hasRemoteAccess` tinyint(1) NOT NULL DEFAULT 0,
  `personAdditStatus` char(1) NOT NULL DEFAULT 'A',
  `grade` int(10) unsigned NOT NULL DEFAULT 0,
  `FTE` decimal(6,2) NOT NULL DEFAULT 0.00,
  `BECCA` tinyint(1) NOT NULL DEFAULT 0,
  `ALT_ED` tinyint(1) NOT NULL DEFAULT 0,
  `INPR` tinyint(1) NOT NULL DEFAULT 0,
  `Cedars_ID` varchar(15) DEFAULT NULL,
  `WVC_SID` varchar(15) NOT NULL DEFAULT '',
  `WEXHours` decimal(6,2) NOT NULL DEFAULT 0.00,
  `hrsPossible` decimal(6,2) NOT NULL DEFAULT 0.00,
  `registerDate` date NOT NULL DEFAULT '0000-00-00',
  `inactiveDate` date NOT NULL DEFAULT '0000-00-00',
  `inactiveReason` varchar(20) NOT NULL DEFAULT '',
  `lastClockIn` datetime DEFAULT '0000-00-00 00:00:00',
  `wvc` tinyint(3) unsigned NOT NULL DEFAULT 0,
  `rStart` tinyint(3) unsigned NOT NULL DEFAULT 0,
  `nextMapDate` date NOT NULL DEFAULT '0000-00-00',
  `aleOpd` char(1) NOT NULL DEFAULT '',
  `cmLevel` char(1) NOT NULL DEFAULT '0',
  `remainingFTE` decimal(6,1) DEFAULT 0.0,
  `creditsToDate` decimal(6,1) DEFAULT 0.0,
  `freeLunch` int(1) DEFAULT 0,
  `homeless` int(1) DEFAULT 0,
```

```
  `specialED` int(1) DEFAULT 0,
  `plan504` int(1) DEFAULT 0,
  `preEngage` int(1) DEFAULT 0,
  `creditDeficient` int(1) DEFAULT 0,
  `creditDeficientDesc` varchar(60) DEFAULT '',
  `referralOnFile` int(1) DEFAULT 0,
  `monthsOut` int(2) DEFAULT 0,
  `paidToDate` decimal(6,0) DEFAULT 0,
  `paidToDateTotal` decimal(8,2) DEFAULT 0.00,
  `hasIEP` tinyint(3) unsigned NOT NULL DEFAULT 0,
  `IEP_504Date` date DEFAULT NULL,
  `gradYear` int(10) unsigned DEFAULT NULL,
  `districtCode` varchar(10) DEFAULT '',
  `schoolCode` int(10) unsigned DEFAULT NULL,
  `isPreETS` char(1) DEFAULT NULL,
  PRIMARY KEY (`personAdditDBNum`),
  UNIQUE KEY `PersonDBNumIndex` (`personDBNum`)
) ENGINE=InnoDB AUTO_INCREMENT=25829 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

2. Office Table (Parent Table)

```
CREATE TABLE `office` (
  `officedbnum` int(11) NOT NULL AUTO_INCREMENT,
  `businessBranchDBNum` int(11) NOT NULL DEFAULT 0,
  `officename` varchar(50) NOT NULL DEFAULT '',
  `shortname` varchar(10) NOT NULL DEFAULT '',
  `status` char(1) NOT NULL DEFAULT '',
  `address` varchar(100) NOT NULL DEFAULT '',
  `city` varchar(50) NOT NULL DEFAULT '',
  `state` char(2) NOT NULL DEFAULT '',
  `zip` varchar(10) NOT NULL DEFAULT '',
  PRIMARY KEY (`officedbnum`),
  UNIQUE KEY `shortNameIndex` (`shortname`),
  KEY `statusIndex` (`status`)
) ENGINE=InnoDB AUTO_INCREMENT=48 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

3. Business Table (Parent Table)

```
CREATE TABLE `business` (
  `businessDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `businessName` varchar(50) NOT NULL DEFAULT '',
  `businessType` varchar(20) NOT NULL DEFAULT '',
  `mainPhone` varchar(10) NOT NULL DEFAULT '',
  `ubiNumber` varchar(12) NOT NULL DEFAULT '',
  `naicsCode` varchar(8) NOT NULL,
  `status` char(1) NOT NULL DEFAULT '',
  PRIMARY KEY (`businessDBNum`),
  UNIQUE KEY `bisNameIndex` (`businessName`)
) ENGINE=InnoDB AUTO_INCREMENT=25671 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

4. Contract Table (References Person and Office)

```
CREATE TABLE `contract` (
  `contractDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `personDBNum` int(11) NOT NULL DEFAULT 0,
  `officeDBNum` int(11) NOT NULL DEFAULT 0,
  `startDate` date NOT NULL DEFAULT '0000-00-00',
  `endDate` date DEFAULT NULL,
  `contractStatus` char(1) NOT NULL DEFAULT 'A',
  PRIMARY KEY (`contractDBNum`),
  FOREIGN KEY (`personDBNum`) REFERENCES `person` (`personDBNum`),
  FOREIGN KEY (`officeDBNum`) REFERENCES `office` (`officedbnum`)
) ENGINE=InnoDB AUTO_INCREMENT=2881 DEFAULT CHARSET=utf8
COLLATE=utf8_general_ci;
```

5. Address Table (References Person)

```
CREATE TABLE `address` (
  `addressDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `personDBNum` int(11) NOT NULL DEFAULT 0,
  `address1` varchar(80) NOT NULL DEFAULT '',
  `city` varchar(40) NOT NULL DEFAULT '',
  `state` char(2) NOT NULL DEFAULT '',
  `zip` varchar(10) NOT NULL DEFAULT '',
  `status` char(1) NOT NULL DEFAULT '',
  PRIMARY KEY (`addressDBNum`),
  FOREIGN KEY (`personDBNum`) REFERENCES `person` (`personDBNum`)
) ENGINE=InnoDB AUTO_INCREMENT=192466 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

6. Role and PersonRole Tables

```
CREATE TABLE `personrole` (
  `personRoleDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `personDBNum` int(11) NOT NULL DEFAULT 0,
  `roleDBNum` int(11) NOT NULL DEFAULT 0,
  `officeDBNum` int(11) NOT NULL DEFAULT 0,
  `status` char(1) NOT NULL DEFAULT 'A',
  PRIMARY KEY (`personRoleDBNum`),
  FOREIGN KEY (`personDBNum`) REFERENCES `person` (`personDBNum`),
  FOREIGN KEY (`roleDBNum`) REFERENCES `role` (`roleDBNum`),
  FOREIGN KEY (`officeDBNum`) REFERENCES `office` (`officeDBNum`)
) ENGINE=InnoDB AUTO_INCREMENT=198723 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

```
     CREATE TABLE `role` (
       `roledbnum` int(11) NOT NULL AUTO_INCREMENT,
       `role` varchar(30) NOT NULL DEFAULT '',
       `status` char(1) NOT NULL DEFAULT '',
       PRIMARY KEY (`roledbnum`),
       UNIQUE KEY `roleIndex` (`role`),
       KEY `statusIndex` (`status`)
     ) ENGINE=InnoDB AUTO_INCREMENT=18 DEFAULT CHARSET=latin1
     COLLATE=latin1_swedish_ci;
```

7. LCEnroll Table (References Person and Office)

```
CREATE TABLE `lcenroll` (
  `lcEnrollDBNum` int(10) unsigned NOT NULL AUTO_INCREMENT,
  `learnerDBNum` int(11) DEFAULT NULL,
  `officeDBNum` int(11) DEFAULT NULL,
  `startDate` date NOT NULL DEFAULT '0000-00-00',
  `exitDate` date NOT NULL DEFAULT '0000-00-00',
  `lcEnrollStatus` char(1) NOT NULL DEFAULT 'A',
  PRIMARY KEY (`lcEnrollDBNum`),
  FOREIGN KEY (`learnerDBNum`) REFERENCES `person` (`personDBNum`),
  FOREIGN KEY (`officeDBNum`) REFERENCES `office` (`officedbnum`)
) ENGINE=InnoDB AUTO_INCREMENT=9936 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

8. LCGroup Table (References Learner Group)

```
CREATE TABLE `lcgroup` (
  `lcGroupDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `lcGroupName` varchar(150) NOT NULL DEFAULT '',
  `lcGroupStatus` char(1) NOT NULL DEFAULT 'A',
  PRIMARY KEY (`lcGroupDBNum`)
) ENGINE=InnoDB AUTO_INCREMENT=78 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

9. LC Learner Group Table (References Person and Group)

```
CREATE TABLE `lclearnergroup` (
  `lcLearnerGroupDBNum` int(11) NOT NULL AUTO_INCREMENT,
  `lcGroupDBNum` int(11) NOT NULL DEFAULT 0,
  `learnerDBNum` int(11) NOT NULL DEFAULT 0,
  `lcLearnerGroupStatus` char(1) NOT NULL DEFAULT 'A',
  PRIMARY KEY (`lcLearnerGroupDBNum`),
  FOREIGN KEY (`learnerDBNum`) REFERENCES `person` (`personDBNum`),
  FOREIGN KEY (`lcGroupDBNum`) REFERENCES `lcgroup` (`lcGroupDBNum`)
) ENGINE=InnoDB AUTO_INCREMENT=11928 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;
```

How To Install DBeaver (Database Manager)

Here's a simple step-by-step guide to install DBeaver, a database management tool: You will need this tool or something similar to run SQL queries like the ones in the next section.

Step 1: Download DBeaver

1. Go to the official DBeaver website.
2. Click on the Download button.
3. Choose the DBeaver Community edition (which is free) unless you need the Enterprise edition.
4. Select your operating system (Windows, macOS, or Linux) and click Download.

Step 2: Install DBeaver on Windows or macOS

For Windows:

1. Once the download is complete, locate the `.exe` file in your Downloads folder.
2. Double-click the `.exe` file to start the installation process.
3. Follow the on-screen instructions. You may be prompted to:
    - Choose the installation directory.
    - Select additional components (such as JRE if you don't have it installed).
4. Click Next and then Install.
5. Once the installation is complete, click Finish.

For macOS:

1. Open the `.dmg` file you downloaded.
2. Drag and drop the DBeaver icon into the Applications folder.
3. Go to your Applications folder, find DBeaver, and double-click to launch it.

Step 3: Launch DBeaver

1. After installation, open DBeaver from the Start menu (Windows), Launchpad (macOS), or search for it in your application menu (Linux).
2. You can now set up connections to your databases and begin using DBeaver.

Note: In order to connect DBeaver to the CMS database you will need to contact the database administrator for authentication details and training.

Introduction to SQL and MariaDB

Welcome to this beginner-friendly tutorial on SQL (Structured Query Language) using MariaDB! If you're new to databases and SQL, you're in the right place. This guide will introduce you to the basics of SQL and show you how to interact with a database using example tables. We'll focus on querying data without modifying it, so you won't need to worry about inserting, updating, or deleting information.

What is SQL?

SQL is a standard language used to communicate with relational databases. It allows you to retrieve, manipulate, and manage data stored in tables.

What is MariaDB?

MariaDB is an open-source relational database management system (RDBMS) that is a fork of MySQL. It's widely used for its reliability, performance, and ease of use.

Understanding the Database Tables

Before we dive into SQL queries, let's familiarize ourselves with the tables we'll be using. Imagine we're managing data for a company that deals with people, businesses, and contracts. Here are the tables:

1. **Person**: Contains personal information about individuals.
2. **PersonAddit**: Additional information related to a person..
3. **Office**: Information about different office locations.
4. **Business**: Details of businesses associated with the company.
5. **Contract**: Records of contracts between persons and offices.
6. **Address**: Addresses associated with persons.
7. **Role and PersonRole**: Roles that a person has within an office.

Basic SQL Queries

1. Selecting All Data from a Table

To view all data from a table, use the `SELECT` statement with the `*` wildcard.

```
SELECT * FROM person;
```

This query retrieves all columns and rows from the `person` table.

2. Selecting Specific Columns

If you want to see only certain columns, specify them in the `SELECT` clause.

```
SELECT firstName, lastName, birthDate FROM person;
```

This retrieves the first name, last name, and birth date of all persons.

3. Using WHERE Clause to Filter Data

The `WHERE` clause allows you to filter records based on conditions.

Example: Find Persons by Last Name

```
SELECT firstName, lastName FROM person
WHERE lastName = 'Smith';
```

This retrieves the first and last names of all persons whose last name is 'Smith'.

Example: Find Persons Born After a Certain Date

```
SELECT firstName, lastName, birthDate FROM person
WHERE birthDate > '1990-01-01';
```

This retrieves persons born after January 1, 1990.

4. Sorting Results with ORDER BY

Use `ORDER BY` to sort the results.

Example: Sort Persons by Last Name

```
SELECT firstName, lastName FROM person
ORDER BY lastName ASC;
```

This sorts the results alphabetically by last name in ascending order.

5. Joining Tables

To combine data from multiple tables, use `JOIN`.

Example: Retrieve Person and Their Address

Suppose we want to get the names and addresses of all persons.

```
SELECT person.firstName, person.lastName, address.address1,
address.city, address.state, address.zip
FROM person
JOIN address ON person.personDBNum = address.personDBNum;
```

This joins the `person` and `address` tables where their `personDBNum` fields match.

Understanding the Query

- `person.firstName`: Specifies the `firstName` column from the `person` table.
- `JOIN address ON person.personDBNum = address.personDBNum`: Joins the `address` table where the `personDBNum` matches in both tables.

6. Using Aliases for Simplicity

Aliases can simplify queries by giving tables temporary names.

```
SELECT p.firstName, p.lastName, a.address1, a.city, a.state, a.zip
FROM person AS p
JOIN address AS a ON p.personDBNum = a.personDBNum;
```

Here, `p` is an alias for `person`, and `a` is an alias for `address`.

7. Filtering Joined Data

You can add a `WHERE` clause to filter joined data.

Example: Persons in a Specific City

```
SELECT p.firstName, p.lastName, a.city
FROM person AS p
JOIN address AS a ON p.personDBNum = a.personDBNum
WHERE a.city = 'Seattle';
```

This retrieves names of persons who live in Seattle.

8. Using Aggregate Functions

Aggregate functions perform calculations on multiple rows.

Example: Count Number of Persons

```
SELECT COUNT(*) AS totalPersons FROM person;
```

This returns the total number of persons in the `person` table.

Example: Grouping Data

Suppose we want to find out how many persons are in each city.

```
SELECT a.city, COUNT(*) AS numPersons
FROM address AS a
GROUP BY a.city;
```

This groups the data by city and counts the number of persons in each.

9. Joining Multiple Tables

You can join more than two tables in a single query.

Example: Persons, Their Roles, and Offices

```
SELECT p.firstName, p.lastName, r.role, o.officename
FROM person AS p
JOIN personrole AS pr ON pr.personDBNum = p.personDBNum
JOIN role       AS r  ON r.roleDBNum    = pr.roleDBNum
JOIN office     AS o  ON o.officeDBNum  = pr.officeDBNum;
WHERE
     pr.status = 'A' AND r.role = 'STAFF'
ORDER BY o.officename
```

This retrieves the names of Staff persons(those with a STAFF role), and the office they are associated with.

```
Person    Role    Office
     \     |     /
       PersonRole
```

Putting It All Together

Example Scenario: Finding Active Contracts

Suppose we want to find all active contracts, including the person's name and the office name.

```
SELECT p.firstName, p.lastName, o.officename, c.startDate, c.endDate
FROM contract AS c
JOIN person AS p ON p.personDBNum = c.personDBNum
JOIN office AS o ON o.officeDBNum = c.officedbnum
WHERE c.contractStatus = 'A';
```

Explanation

- `contract AS c`: Alias `c` for the `contract` table.
- `JOIN person AS p ON c.personDBNum = p.personDBNum`: Join `person` table to get person's details.
- `JOIN office AS o ON c.officeDBNum = o.officedbnum`: Join `office` table to get office details.
- `WHERE c.contractStatus = 'A'`: Filter contracts where the status is 'Active'.

Tips for Writing SQL Queries

- **Start Simple**: Begin with basic `SELECT` statements and gradually add complexity.
- **Use Aliases**: They make your queries cleaner and easier to read.
- **Test Incrementally**: Run your queries step by step to ensure each part works.
- **Readability Matters**: Use proper indentation and line breaks for complex queries.

Conclusion

Congratulations! You've taken your first steps into the world of SQL with MariaDB. We've covered how to select data from tables, filter results, sort data, and join tables to retrieve related information. Remember, practice is key to becoming proficient in SQL. Try creating your own queries using these tables to reinforce what you've learned.

Additional Resources

- **MariaDB Documentation**: https://mariadb.com/kb/en/documentation/
- **SQL Tutorial**: https://www.w3schools.com/sql/
- **Database Design Basics**: Understanding how tables relate can help you write better queries.

NON-DISCLOSURE AGREEMENT (NDA)

For WIOA Employees with Access to the CMS Database

This Non-Disclosure Agreement is entered into on this ________________ by and between:

SKILLSOURCE ("Disclosing Party"),
and
Employee Name: ________________________________("Receiving Party").

1. Purpose

The purpose of this Agreement is to protect the confidentiality of Personally Identifiable Information ("PII") stored in the CMS (Case Management System) database, which the Employee may access in the course of their employment under the Workforce Innovation and Opportunity Act ("WIOA").

2. Confidential Information

Confidential Information includes, but is not limited to, the following types of information contained within the CMS database:

- Names, addresses, and contact details.
- Social Security Numbers (SSNs).
- Employment histories, records, and status.
- Financial data, income information, and benefits.
- Any other PII or sensitive data relating to individuals in the system.

3. Obligations of the Employee

The Employee agrees to the following:

- To treat all information contained in the CMS database as strictly confidential.
- To use the PII only for legitimate WIOA purposes and never for personal or non-work-related use.
- Not to disclose any PII or related data to unauthorized individuals, third parties, or external entities.
- To take reasonable measures to safeguard the CMS data and prevent unauthorized access or breaches.

4. Exceptions to Confidentiality

The Employee's obligations under this Agreement do not extend to information that:

- Is or becomes public knowledge through no fault of the Employee.

- Is required to be disclosed by law, provided the Employee gives prompt notice to the Disclosing Party so that appropriate protective measures may be taken.

5. Duration of Confidentiality Obligations

The confidentiality obligations under this Agreement shall remain in effect during the term of employment and for a period of **two (2) years** following the termination of the Employee's employment, regardless of the reason for termination.

6. Breach of Agreement

If the Employee breaches this Agreement, the Disclosing Party may seek injunctive relief and any other legal remedies available, including compensatory damages.

7. Return of Materials

Upon termination of the Employee's employment, or upon request by the Disclosing Party, the Employee shall promptly return all materials, documents, and records related to CMS, including any copies thereof.

8. Miscellaneous

- This Agreement constitutes the entire understanding between the parties concerning the subject matter herein.
- This Agreement may not be amended or modified except in writing signed by both parties.
- If any provision of this Agreement is found to be unenforceable, the remaining provisions shall remain in full force and effect.

9. Governing Law

This Agreement shall be governed by and construed in accordance with the laws of the State of **Washington**.

10. Signatures

By signing below, the Employee agrees to the terms and conditions outlined in this Non-Disclosure Agreement.

Disclosing Party:
SKILLSOURCE
Signature: ____
Date: __________________________

Employee: ____________________________________
Signature: _____________________________________
Date: __________________________