

# TRAIN Training



# TRAIN Training

## Welcome to TRAIN Training

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### Course Overview

Welcome to TRAIN Training. This two-day training session will focus on using TRAIN to perform day-to-day transactions. This training will be supported by the documentation presented in this guide, the Using TRAIN manual and class handouts.

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### How the course is structured

This training class will allow you to explore the functionality of TRAIN and give you an opportunity to practice day-to-day transactions in a training environment prior to processing the transactions in “live” TRAIN.

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### Your Participation

Your participation is key to making this class successful. Please feel free to ask any questions.

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# Preferences Exercises

## Personify Skill Codes

Location: Other menu >> Preferences >> Lists >> Personify Skill Codes

**Overview** Skill Codes are special codes associated to a class. Once a member successfully completes a class session, the Skill Code affiliated to the class is sent to the Personify system for dispatching.



- ✓ **Tips**
- Local Unions utilize Skill Codes to dispatch eligible members to job sites
  - Only the CITF may alter the Skill Codes affiliated to CITF Classes
  - Personify Skill Codes may not exceed 8 characters

**Exercise 1** Access the List screen and create three Personify Skill Codes.

Document the name of your Skill Codes:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The screenshot shows the 'Lists' screen with a navigation bar at the top containing: Books, Class Training Locations, Contractors, Evaluation, JATC, Lists (selected), Settings, Staff, and Wage Rates. The main area is titled 'Lists' and contains two sections: 'List Items' and 'Personify Skill Code'. The 'Personify Skill Code' section is highlighted with a red box. It has a 'Hide' button and a table with the following data:

Personify Skill Code	Description	
SILICA	SILICA 101	 

# Preferences Exercises

## Books

Location: Other menu >> Preferences >> Books

**Overview** Training Centers utilize the Books screen to track Books and Manuals.

✓ **Tips** Books and Manuals can be attached to the Class Creation & Editing screen, Schedule Class Session screen and the member record.

**Exercise 1** Access the Books screen and add three Books.

Document the name of your Books:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

The screenshot shows the 'Books' screen in a software application. The top navigation bar includes 'Books', 'Class Training', 'Locations', 'Contractors', 'Evaluation', 'JATC', 'Lists', 'Settings', 'Staff', and 'Wage Rates'. The main title is 'Books'. Below the title, there is a 'Hide' button and a 'Books' label. A form at the top allows adding new books with fields for 'Item Number', 'Description', 'Prod Line' (a dropdown menu currently showing 'BKS'), 'Unit/Measure', 'Standard Price', 'Unit Cost', and an 'Add' button. Below this form is a table with the following data:

Item Number	Description	Prod Line	Unit/Measure	Standard Price	Unit Cost	
978-0-8269-0800-1	Carpentry 5th Edition Text	BKS	1	20.00	25.00	
978-0-8269-0800-10	Carpentry 6th Edition Text	BKS	1	20.00	25.00	
978-0-8269-0801-8	Carpentry Workbook 5th Edition	BKS	1	25.00	25.00	







## Preferences Exercises

**Exercise 2** Access the Books screen and add three Manuals.

Document the name of your Manuals:







1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The screenshot shows the 'Books' screen with a navigation bar at the top containing 'Books', 'Class Training', 'Locations', 'Contractors', 'Evaluation', 'JATC', 'Lists', 'Settings', 'Staff', and 'Wage Rates'. The main title is 'Books'. Below it is a 'Hide' button and the word 'Books'. A form area contains fields for 'Item Number', 'Description', 'Prod Line' (set to 'MNL'), 'Unit/Measure', 'Standard Price', and 'Unit Cost', followed by an 'Add' button. Below this is a table with the following data:

Item Number	Description	Prod Line	Unit/Measure	Standard Price	Unit Cost	
978-0-8269-0800-1	Carpentry 5th Edition Text	BKS	1	20.00	25.00	 
978-0-8269-0800-10	Carpentry 6th Edition Text	BKS	1	20.00	25.00	 
978-0-8269-0801-8	Carpentry Workbook 5th Edition	BKS	1	25.00	25.00	 

**Exercise 3** Access the Books screen and Edit an existing Book.

The screenshot shows the 'Books' screen with the same navigation bar and title as the previous image. The form area has a red box around the 'Item Number' field, which contains '978-0-8269-'. The 'Description' field contains 'Carpentry 5th Edition Text'. The 'Prod Line' dropdown is set to 'BKS', 'Unit/Measure' is '1', 'Standard Price' is '20.00', and 'Unit Cost' is '25.00'. The 'Add' button is to the right. Below the form is a table with the same data as the previous image. The 'edit icon' for the first row is highlighted with a red box.

Item Number	Description	Prod Line	Unit/Measure	Standard Price	Unit Cost	
978-0-8269-0800-1	Carpentry 5th Edition Text	BKS	1	20.00	25.00	 
978-0-8269-0800-10	Carpentry 6th Edition Text	BKS	1	20.00	25.00	 
978-0-8269-0801-8	Carpentry Workbook 5th Edition	BKS	1	25.00	25.00	 

## Preferences Exercises

---

### Class Training Locations

Location: Other menu >> Preferences >> Class Training Locations

**Overview** The Class Training Locations is utilized to designate a training location that is affiliated to the Training Center.

- ✓ **Tips**
- The Class Training Location field is located on the Schedule Class Session screen
  - The Class Training Location is a display field within Custom Searches providing reporting capability
- 

**Exercise 1** Access the Class Training Locations screen and add three locations.

Document the name of your Training Locations:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

The screenshot shows a software interface with a menu bar at the top containing: Books, Class Training Locations (highlighted), Contractors, Evaluation, JATC, Lists, Settings, Staff, and Wage Rates. Below the menu bar is a title bar for the 'Class Training Locations' window. Inside the window, there is a 'Hide' button and a section titled 'Class Training Locations'. This section contains several input fields: 'Class Training Locations:' (a dropdown menu), '\*Training Location Name:' (a text field), 'Building Description:' (a text field), 'Location(s):' (a table with columns 'Room' and 'Capacity', and an 'Add' button), 'Address:' (a text field), 'Country:' (a dropdown menu), 'State/Province:' (a dropdown menu), 'City:' (a text field), 'ZIP/Postal Code:' (a text field), 'Phone:' (a text field), 'Fax:' (a text field), and 'Notes:' (a large text area). At the bottom of the window are 'Clear' and 'Create' buttons.

## Preferences Exercises

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**Exercise 2** Select an existing Class Training Location from the drop-down list and edit the information.

Books	Class Training Locations	Contractors	Evaluation	JATC	Lists	Settings	Staff	Wage Rates
-------	--------------------------	-------------	------------	------	-------	----------	-------	------------

**Class Training Locations**

**Hide** *Class Training Locations*

**Class Training Locations:**

**\*Training Location Name:**

**Building Description:**

Location(s):	Room	Capacity
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Address:**

**Country:**

**State/Province:**

**City:**

**ZIP/Postal Code:**

**Phone:**

**Fax:**

**Notes:**



# Preferences Exercises

## Staff

Location: Other menu >> Preferences >> Staff

**Overview** The Staff screen is used to enter your Training Center Staff.

- ✓ Tips
  - Select the Position of "Instructor" and the Staff member will display on the Instructor list for your Local Program Classes
  - Upon creating a Staff record the system generates a member record and UBC ID

**Exercise 1** Access the Staff screen and create three Staff records by populating the information.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Staff**

**Staff Information**

Staff: [dropdown] ☐ Outside Instructor

First Name\* [John] Middle Name [ ] Last Name\* [Smith] SSN/SIN\* [ ] Title [dropdown] UBC ID [ ] Status [dropdown]

**Address Information**

Address: [740 Olive Street]

Country: [US] State/Province: [NV] City: [Las Vegas] ZIP/Postal Code: [89044] Email: [ ]

Hire Date: [ ] Last Review Date: [ ] Phone: [ ] Alternate Phone: [ ]

**Position**

[dropdown]

Emergency Contact: [ ] Emergency Contact Phone: [ ]

Supervisor Name: [ ] Supervisor Email: [ ]

Notes: [ ]

Certified: ☐ Certification: [ ] Expires: [ ] [Add]

Preferred Shift: [dropdown] Preferred Location: [dropdown] Specialty: [ ] [Add]

**History**

Class ID	Subject	Class Date	Hours	Enrolled
----------	---------	------------	-------	----------

[Clear] [Add]

## Preferences Exercises

**Exercise 2** Access the Staff screen and create three Staff records. Select the Outside Instructor option and designate the Position of "Instructor".

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Staff**

**Hide** **Staff Information**

Staff:  ☒ Outside Instructor

First Name\*  Middle Name  Last Name\*  SSN/SIN  Title  UBC ID  Status

**Address Information**

Address:

Country:  State/Province:

City:  ZIP/Postal Code:

Email:

Hire Date:  Last Review Date:  Phone:  Alternate Phone:

**Position**

Instructor

Emergency Contact:  Emergency Contact Phone:

Supervisor Name:  Supervisor Email:

Notes:

Certified: ☐ Certification:  Expires:  Add

Preferred Shift:  Preferred Location:

Specialty:  Add

**Master Instructor**

CITF Classes:  Add

**Hide** **History**

Class ID	Subject	Class Date	Hours	Enrolled
----------	---------	------------	-------	----------

Clear Add

## Preferences Exercises

**Exercise 3** Access the Staff screen and create three Staff records utilizing the Quick Search functionality and designate the Position of “Instructor”.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Quick Search**

Country:  First Name:  Middle Name:  Last Name:  SSN/SIN:  UBC ID:

Member Status: ☐ Active ☐ Inactive ☐ Suspended

Classification: ☐ Applicant ☐ Apprentice ☐ Journeyman

☐ SSN/SIN Unknown ☐ Deactivated Records ☐ Bad Address

Training Center:

Local:  Wage Rate:  Craft:

[Advanced Search Options](#)

**Staff**

**Staff Information**

Staff:  ☐ Outside Instructor

First Name\*  Middle Name  Last Name\*  SSN/SIN\*  Title  UBC ID  Status

**Address Information**

Address:

Country:  State/Province:

City:  ZIP/Postal Code:

Email:

Hire Date:  Last Review Date:  Phone:  Alternate Phone:

Emergency Contact:  Emergency Contact Phone:

Supervisor Name:  Supervisor Email:

Notes:

Certified: ☐

Certification:  Expires:

Preferred Shift:  Preferred Location:

Specialty:

**Master Instructor**

CITF

Classes:

**History**

Class ID	Subject	Class Date	Hours	Enrolled
----------	---------	------------	-------	----------

# Preferences Exercises

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## Contractors

Other menu >> Preferences >> Contractors

**Overview** The Contractors screen is used to enter your Contractor information.

- ✓ **Tips**
- You have the option to add a Contractor to all of your Training Centers within the Trust Fund
  - You have the option to add additional contact information for each Contractor
- 

**Exercise 1** Access the Contractor screen and add three Contractors.

Document the name of your Contractors:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

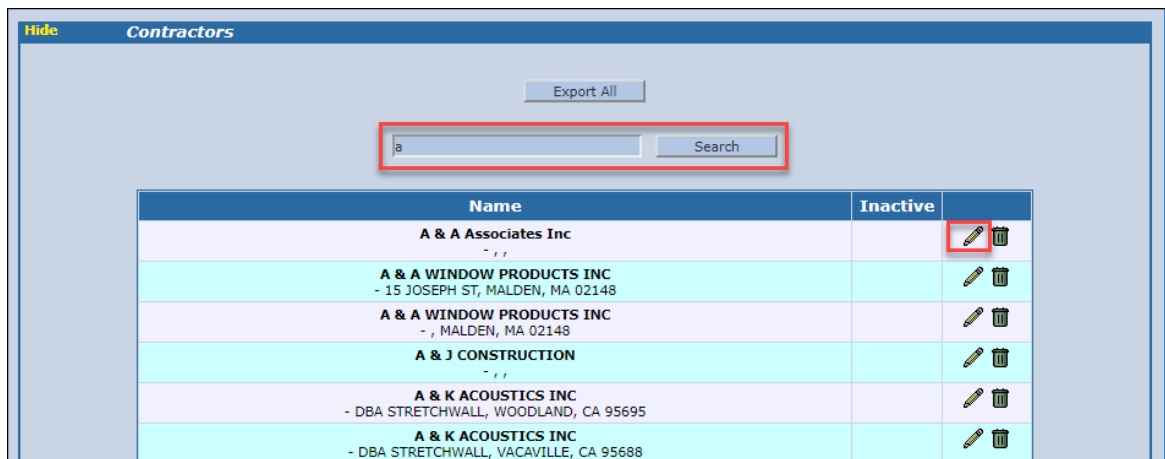
The screenshot displays the 'Contractors' screen with a 'Contractor Detail' form. At the top, there is a checkbox labeled 'Add Contractor to all Training Centers in: Southwest Carpenters Training Fund'. The form fields include: \*Contractor Name (Ace Construction), EIN, Address (123 Happy Lane), City (Las Vegas), State/Province (NV), ZIP/Postal Code (89074), Phone ((702) 784-7877), Fax ((702) 787-8747), and Contractor Email (email@email.com). A 'Craft' dropdown menu is open, showing options: Acoustical Carpenter, Cabinetmaker, Carpenter, Drywall, and Drywall Applicator. At the bottom, there are 'Save' and 'Clear' buttons, with the 'Save' button highlighted by a red rectangle. Below the buttons is a table with columns: Contact Name, Contact Title, Contact Email, Contact Phone, Primary, and an empty column.

Contact Name	Contact Title	Contact Email	Contact Phone	Primary	
--------------	---------------	---------------	---------------	---------	--

## Preferences Exercises










**Exercise 2** Search for an existing Contractor and edit the record. **Note:** You may enter the first letter of the Contractor and select Search.

Document the name of your Contractor:



Export All

a Search

Name	Inactive	
A & A Associates Inc		 
A & A WINDOW PRODUCTS INC - 15 JOSEPH ST, MALDEN, MA 02148		 
A & A WINDOW PRODUCTS INC - , MALDEN, MA 02148		 
A & J CONSTRUCTION		 
A & K ACOUSTICS INC - DBA STRETCHWALL, WOODLAND, CA 95695		 
A & K ACOUSTICS INC - DBA STRETCHWALL, VACAVILLE, CA 95688		 

**Exercise 3** Search for an existing Contractor and add Contact Information by selecting Add Contact.

Document the name of your Contractor:



Contractors

Hide Contractor Detail

☐ Inactive

\*Contractor Name: ACE EIN:

Address: 640 Apple Tree Street

City: Las Vegas State/Province: NV ZIP/Postal Code: 89119

Phone: (702) 454-7487

Fax: (702) 654-2147

Contractor Email: email@email.com

Craft: Acoustical Carpenter  
Cabinetmaker  
Carpenter  
Drywall  
Drywall Applicator

Save Clear Add Contact

Contact Name	Contact Title	Contact Email	Contact Phone	Primary
--------------	---------------	---------------	---------------	---------

## Preferences Exercises

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### Training Center Closures

Other menu >> Preferences >> Training Center Closures

**Overview** The Training Center Closure functionality provides the option to identify dates that the Training Center is closed.

- ✓ **Tips**
- The closure dates will display in yellow on the Class Calendar
  - Hover over the closure dates on the Class Calendar and the closure reason is displayed
  - You may add the closure dates to all Training Centers under the same Training Fund
  - You may continue to schedule class sessions on closure dates
- 

**Exercise 1** Access the Training Center Closures screen and add three closure dates. Verify the closure dates and closure reason displays on your class calendar.

Document the dates of the Training Center Closures:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Training Center Closures**

**Add**

Reason for Closure:  From:  To:

☐ Add to all Training Centers in:

**Saved Closures**

There are no closures to display.

# Class Management Exercises

## Classes

Location: Class Management >> Classes

**Overview** The Classes screen displays your Local Program Classes, Local Certification Classes, CITF Classes, Retired and Imported Classes.

- ✓ **Tips**
- The Classes screen provides the ability to schedule a class session, edit a class, delete a class and view the Class Wait List
  - Select the Export Classes button to view a report of the class details
  - Designate a Class Name or Class Session to display on the Online Member Class Registration within Carpenters.org













**Exercise 1** Create five **Local Program Classes** by accessing the Classes screen and select Add Class.

**Note:** Do not populate the Class Certification section.

Document the name of your Local Program Classes:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

The screenshot shows the 'Classes' management interface. At the top is a navigation bar with tabs: Class Calendar, Classes (selected), CITF Skill Codes, Curriculum, Schedule Class Session, Registration, Attendance & Grading, Reschedule, Class Wait List, Class Session Search, Class Data & Master Reports, Sign-In Sheets, and Recap Sheets. Below the navigation bar is a 'Classes' section with an 'Add Class' button highlighted by a red box. Underneath is a 'Class Name Search:' input field. Below the search field are five tabs: Local Program Classes (selected), Local Certification Classes, CITF Classes, Retired Classes, and Imported Classes. Below these tabs is an 'Export Classes' button. A note states: '\*Meets Prerequisites and Additional Requirements for CITF Classes.' Below the note is a table with three rows of class entries:

* AED - American Heart Association (AHA)	   
* AED - American Red Cross (ARC)	   
* AED - American Safety and Health Institute (ASHI)	   

## Class Management Exercises

**Exercise 2** Create two **Local Certification Classes** by accessing the Classes screen and select Add Class. Designate your classes as Local Certification Classes with **No Expiration Date Rule** within the Class Certification section.

Document the name of your Local Certification Classes:

1. \_\_\_\_\_
2. \_\_\_\_\_

**Class Creation and Editing**

Create/Edit Class

\* Class Name: Aerial Lift (Outside)

Description:

\* Apprentice Grading Scale: Pass/Fail/Incomplete

Minimum Passing Grade: P

Class Created Date: 01/07/2009

Class Created By: CSTANDRIDGE

\* Class Hours: 0

Class Credits: 0

Class Units: 0

Last Updated: 09/03/2010 10:55:26 PM by LOAD\_LOCAL\_CLASS\_JATC\_SP

\* Journeyman Grading Scale: Pass/Fail/Incomplete

Minimum Passing Grade: P

Class Retirement:

Meets Additional Training Requirements for INSTALL Certifications:

\* Class Min: 0

\* Class Max: 0

**Class Certification**

☒ Local Certification Class

☒ No Expiration Date Rule

\* Expiration Date Rule:  Expires in:  ☐ Last Day of the Month

**Documents**

Add Files

Name	Size	Uploaded On	Uploaded By
------	------	-------------	-------------

**Class Session Preferences**

**Class Supplies**

**Books**

Craft:  Training Location:

Class Type: All Types  
Applicant  
Apprentice

Meeting Times:  to

Instructor(s)

Add

First Last Certified Primary

Cancel Save Audit History



# Class Management Exercises

**Exercise 3** Create two **Local Certification Classes** by accessing the Classes screen and select Add Class. Designate your classes as Local Certification Classes that **Expire from the Date Graded and Expire in 2 years**.

Document the name of your Local Certification Classes:

1. \_\_\_\_\_
2. \_\_\_\_\_

**Class Creation and Editing**

Create/Edit Class

\* Class Name: Aerial Lift (Outside)

Description:

\* Apprentice Grading Scale: Pass/Fail/Incomplete

Minimum Passing Grade: P

Class Created Date: 01/07/2009

Class Created By:

\* Class Hours: 0

Class Credits: 0

Class Units: 0

\* Journeyman Grading Scale: Pass/Fail/Incomplete

Minimum Passing Grade: P

Class Retirement:

Meets Additional Training Requirements for INSTALL Certifications:

\* Class Min: 0

\* Class Max: 0

Last Updated: 09/03/2010 10:55:26 PM by LOAD\_LOCAL\_CLASS\_JATC\_SP

**Class Certification**

☒ Local Certification Class ☐ No Expiration Date Rule

\* Expiration Date Rule: Expire from the Date Graded Expires in: 2 Years ☐ Last Day of the Month

**Documents**

Add Files

**Class Session Preferences**

**Class Supplies**

**Books**

Craft: Training Location:

Class Type: All Types Applicant Apprentice Meeting Times: to

**Instructor(s)**

First Last Certified Primary

Cancel Save Audit History

# Class Management Exercises

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## Class Sessions

Location: Class Management >> Schedule Class Session

**Overview** The Schedule Class Session screen allows you to schedule your classes.

- ✓ **Tips**
- Schedule multiple sessions of a class by using the Add Another option
  - Option to Cancel a Class Session
  - Option to designate the session is available on the new Online Member Class Registration
- 

**Exercise 1** Access the Schedule Class Session screen and schedule a session for the five **Local Program Class** names that you created on page 12. **Note:** Schedule your class sessions for this week.

**Class Name:** \_\_\_\_\_ **Class Dates:** \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Training Location	Select a Training Location
Class Type	Apprentice
Start Date / End Date	Populate a date
Meeting Times	7:00 AM - 3:00 PM
Instructor	Select one of your Staff Instructors

**Class Name:** \_\_\_\_\_ **Class Dates:** \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Class Type	All Types
Start Date/End Date	Populate a date
Meeting Times	6:00 AM - 2:00 PM
Instructor	Select one of your Staff Instructors
Class Supplies	Select two of your Class Supplies

## Class Management Exercises

---

Class Name: \_\_\_\_\_ Class Dates: \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Training Location	Select a Training Location
Class Type	All Types
Start Date/End Date	Populate a date
Meeting Times	7:30 AM – 3:30 PM
Instructor	Select one of your Staff Instructors

Class Name: \_\_\_\_\_ Class Dates: \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Class Type	Apprentice and Journeyman
Start Date/End Date	Populate a date
Meeting Times	10:00 AM – 6:00 PM
Instructor	Select one of your Staff Instructors
Books/Manuals	Select one of your Books/Manuals

Class Name: \_\_\_\_\_ Class Dates: \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Class Type	All Types
Start Date/End Date	Populate a date
Meeting Times	6:00 AM – 2:00 PM
Instructor	Select one of your Staff Instructors
Class Supplies	Select one of your Class Supplies

## Class Management Exercises

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**Exercise 2** Access the Schedule Class Session screen and schedule a session for your two **Local Certification Classes with no expiration date rule** you created on page 13. **Note:** Schedule your class sessions for this week.

Class Name: \_\_\_\_\_ Class Dates: \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Training Location	Select a Training Location
Class Type	All Types
Start Date/End Date	Populate a date
Meeting Times	5:00 AM - 1:00 PM
Instructor	Select one of your Staff Instructors
Books/Manuals	Select one of your Books/Manuals

Class Name: \_\_\_\_\_ Class Dates: \_\_\_\_\_

Field Name	Data
Craft	Select a Craft
Training Location	Select a Training Location
Class Type	All Types
Start Date/End Date	Populate a date
Meeting Times	7:00 AM - 3:00 PM
Instructor	Select one of your Staff Instructors

## Class Management Exercises

---

**Exercise 3** Access the Schedule Class Session screen and schedule a session for your two **Local Certification Classes that expire from the date graded in two years** you created on page 14. **Note:** Schedule your class sessions for this week.

**Class Name:** \_\_\_\_\_ **Class Dates:** \_\_\_\_\_

Field Name	Data
Class Type	Apprentice and Journeyman
Training Location	Select a Training Location
Start Date/End Date	Populate a Start Date
Meeting Times	7:00 AM - 3:00 PM
Instructor	Select one of your Staff Instructors
Books/Manuals	Select one of your Books/Manuals

**Class Name:** \_\_\_\_\_ **Class Dates:** \_\_\_\_\_

Field Name	Data
Class Type	All Types
Start Date/End Date	Populate a Start Date
Meeting Times	7:00 AM - 3:00 PM
Instructor	Select one of your Staff Instructors

# Registration Exercises

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## Groups

**Location:** Students menu >> Groups

**Overview**      The Groups screen allows you to group students together in order to register them as a unit.

- ✓ **Tips**
- The 'Display on Class Registration' option is selected by default ensuring the Group will display on the Registration screen
  - You may create a new Group from the Work Hours Entry screen and Registration screen
- 

**Exercise 1**      Access the Groups screen and create four Groups with five or more students in each Group.

Document the name of your Groups.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_


The screenshot shows the 'Groups' screen. At the top is the title 'Groups'. Below it is a 'Create Group' section with a 'Hide' button. Inside this section, there is a 'Group Name' field containing 'Orientation', a 'Description' field containing 'Safety - Orientation Group #1', and a checked checkbox for 'Display on Class Registration'. At the bottom of the 'Create Group' section are 'Clear' and 'Create' buttons. Below this is a 'Group/Student Search' field. At the bottom of the screen is a 'Groups' section with a 'Hide' button and a list of four items: '1-4-16 Class', 'Applicants', 'Class Change Letters', and 'PITO'.

# Registration Exercises

## Registration

Location: Class Management >> Registration

**Overview** The Registration screen is utilized to register students into a class session.

- ✓ **Tips**
- The Class Name drop down lists displays class sessions scheduled two weeks in the past and two weeks in the future
  - You can also access the Registration screen from the Class Calendar by selecting 

**Exercise 1** Access the Registration screen and locate your five **Local Program Class Sessions** and register 5 or more students. [Reference pages 15-16 for your class session dates]



**Registration**

Class Scheduling

Filter Classes

Craft: All Crafts

Specialties:

- Banner Duty
- Carpenter
- Certifications Only
- Dockbuilder/Piledriver/Diver
- Home Builders

Start Date: End Date:

Local Certification Classes Only: ☐

Filter Classes

Class Name: 10 Hours Class Hours Adjustment- (02/20/18 - 02/20/18)

Class Type: All Types Total Enrolled: 1  
Craft: N/A Space Available: 49  
Meeting Days: Tue Pending Requests: 0  
Language: N/A Instructor: Frank Decesero  
Description: N/A Created By: HTILTON  
Training Location: TBD

UBC ID/SSN/SIN: First Name: Last Name: Local: Search

Adams, Brian - UBC00251, MEMBER, ARRSASSESS Add Student to Class

Group Name: Enroll Group Create Group

Sign-in Sheet Class Data & Master Reports Attendance & Grading Schedule Class Session

Hide Registered Students

UBC ID	Student Name	TRAIN Student Status	TRAIN Classification	Union Classification	Union Status	Conflict Reason	Walk-In	Dropped	Wait List	Move to Class Session Wait List
U	Adams, Brian		Journeyman	MEMBER	ARRSASSESS		<input type="checkbox"/>			

# Registration Exercises

**Exercise 2** Access the Registration screen and locate your two **Local Certification Class Sessions with no Expiration Date Rule** and utilize the Enroll Group option to register your students. [Reference page 17 for your class session dates]

**Registration**

**Class Scheduling**

**Filter Classes**

Craft: All Crafts

**Specialties:**

- Banner Duty
- Certifications Only
- Dockbuilder/Piledriver/Diver
- Home Builders
- In-House

Start Date: End Date:

Local Certification Classes Only: ☐

Filter Classes

**Class Name:** 24 Hour Class Adjustment - (04/30/18 - 04/30/18) [5:00 AM - 1:00 PM]

Class Type:	All Types	Total Enrolled:	0
Craft:	N/A	Space Available:	12
Meeting Days:	Mon	Pending Requests:	0
Language:	N/A	Instructor:	Robt Ackerman
Description:	N/A	Created By:	TSOMMERS
		Training Location:	TBD

**UBC ID/SSN/SIN:** **First Name:** **Last Name:** **Local:** Search

**Group Name:** Orientation Enroll Group

Sign-in Sheet Class Data & Master Reports Attendance & Grading Schedule Class Session

Total Enrolled: 0  
Space Available: 12  
Pending Requests: 0  
Instructor: Robt Ackerman  
Created By: TSOMMERS

Sign-in Sheet Class Data & Master Reports Attendance & Grading Schedule Class Session



# Registration Exercises

## Class Management >> Class Wait List

**Exercise 3** Access the Class Wait List screen and create a Class Wait List for your two **Local Certification Class Sessions with an Expiration Date Rule** and add students individually or add a Group.  
[Reference page 18 for your class session dates]

**Step 1** Locate your class name and add your students.

**Class Wait List**

**Add Students**

☐ Student ☒ Group

Group Name:

Classes:

- 12 Class Adjustment
- 16 Hour Class Hours Adjustment - 1
- 12 Hour Class Adjustment for CSHA-30
- 24 Hour Class Adjustment
- 3-Day Instructor Candidate Program (CITP)

Selected Classes:

- 10 Hours Class Hours Adjustment - 8

**Add Group to Wait List for Selected Classes**

**Enroll/Export/Delete**

[Export Student Information on All Class Wait Lists](#)

Class Name:

Available Class Sessions:

[Enroll](#) [Create Export](#) [Create Report](#) [Audit History Report](#)

**Wait List**

Wait List Number	Student Name	UBC ID	Local	Classification	Union Status	Phone Number	Last Class Date	Latest Cert Exp Date	Date Created	Time Created	Comment

[Enroll](#) [Create Export](#) [Create Report](#) [Audit History Report](#)

**Step 2** Within the Class Wait List screen navigate to the Enroll/Export/Delete section. Select your **Local Certification Class Sessions with an Expiration Date Rule** and enroll your students.

**Class Wait List**

**Add Students**

☐ Student ☒ Group

Group Name:

Classes:

- 01/18/2013 FLOORING/PV Layout SM Supp Skills 7E
- 03 Craft Training By Apprenticeship
- 10 Hours Class Hours Adjustment - 9
- 12 Class Adjustment - 15
- 16 Hour Class Hours Adjustment - 21

Selected Classes:

- 

**Add Group to Wait List for Selected Classes**

**Enroll/Export/Delete**

[Export Student Information on All Class Wait Lists](#)

Class Name:

Available Class Sessions:

[Enroll](#) [Create Export](#) [Create Report](#) [Audit History Report](#)

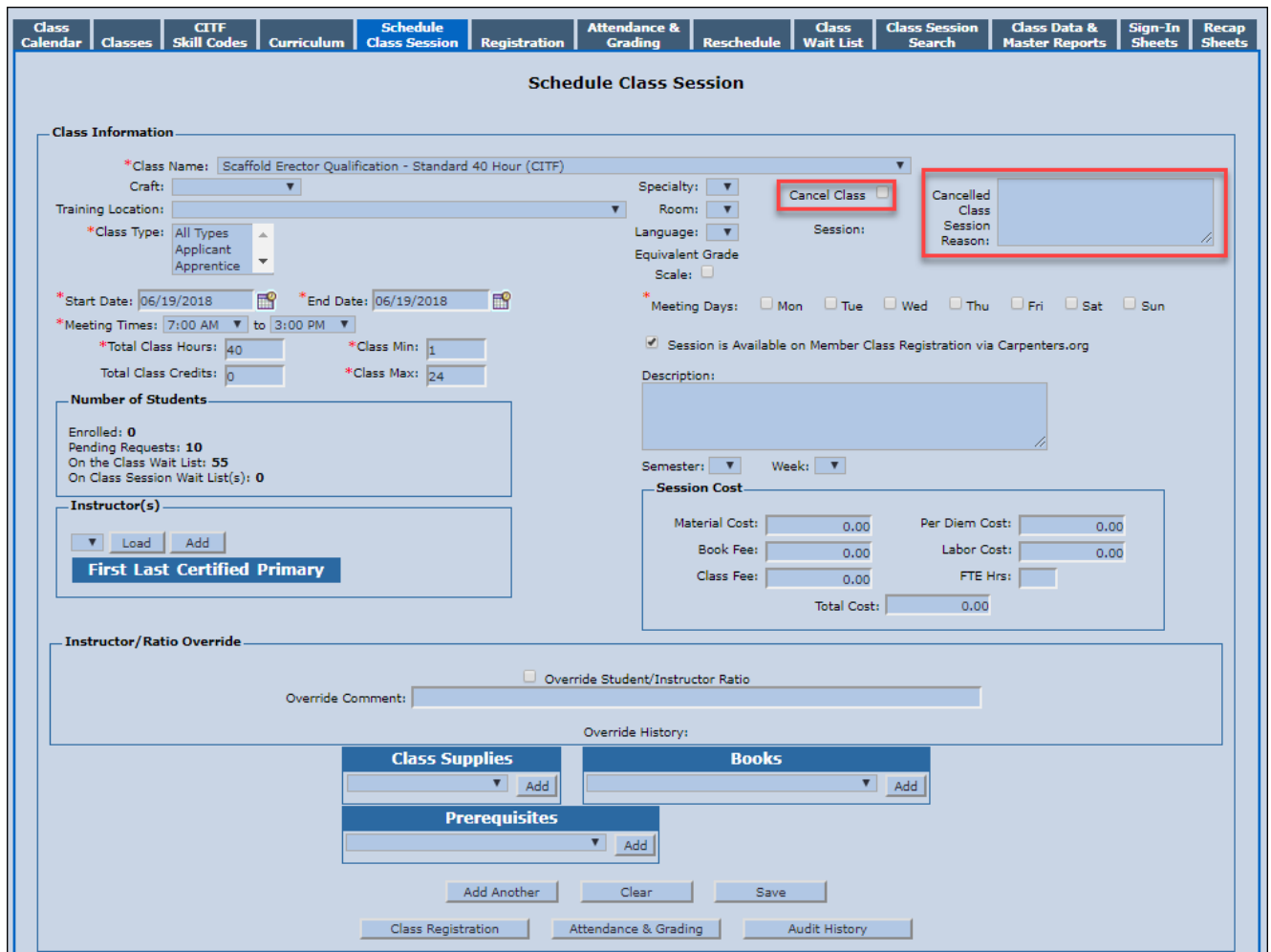
**Wait List**

Wait List Number	Student Name	UBC ID	Local	Classification	Union Status	Phone Number	Last Class Date	Latest Cert Exp Date	Date Created	Time Created	Comment
1	Erick	U	UBC00251	APPRENTIC1	ARREARS	(702) 407-1000			11/30/2018	12:13:47 PM	<a href="#">Add</a>
2	Ryan	U	UBC00255	APPRENTIC2	GOODSTANDG	(702) 407-1000	11/01/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>
3	Frances A	U	UBC00255	APPRENTIC1	GOODSTANDG	(702) 407-1000	10/31/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>
4	Joshua A	U	UBC00255	APPRENTIC1	GOODSTANDG	(702) 407-1000	10/31/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>
5	Brian J	U	UBC00255	APPRENTIC3	GOODSTANDG	(702) 407-1000	10/09/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>
6	Matt C	U	UBC00255	APPRENTIC1	GOODSTANDG	(702) 407-1000	10/09/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>
7	John	U	UBC00251	APPRENTIC2	PENDING	(702) 548-6847			11/30/2018	12:13:47 PM	<a href="#">Add</a>
8	Steven T	U	UBC00255	APPRENTIC2	GOODSTANDG	(702) 407-1000	10/09/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>
9	Stephen B	U	UBC00255	APPRENTIC1	GOODSTANDG	(702) 407-1000	10/09/2018		11/30/2018	12:13:47 PM	<a href="#">Add</a>

## Registration Exercises

Class Calendar >> Locate one of your Class Sessions and select  >> Select Cancel Class and populate a reason.

**Exercise 4** Access the Schedule Class Session screen and cancel one of your sessions. Verify the system graded your students with a grade of "CC" for Cancel Class on the Attendance & Grading screen.



**Schedule Class Session**

**Class Information**

\*Class Name: Scaffold Erector Qualification - Standard 40 Hour (CITF)  
Craft:   
Training Location:   
\*Class Type: All Types  
Applicant  
Apprentice  
Specialty:   
Room:   
Language:   
Equivalent Grade  
Scale:   
\*Start Date: 06/19/2018 \*End Date: 06/19/2018  
\*Meeting Times: 7:00 AM to 3:00 PM  
\*Total Class Hours: 40 \*Class Min: 1  
Total Class Credits: 0 \*Class Max: 24  
\*Meeting Days: ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun  
☒ Session is Available on Member Class Registration via Carpenters.org  
Description:   
Semester:  Week:   
**Session Cost**  
Material Cost: 0.00 Per Diem Cost: 0.00  
Book Fee: 0.00 Labor Cost: 0.00  
Class Fee: 0.00 FTE Hrs:   
Total Cost: 0.00

**Number of Students**  
Enrolled: 0  
Pending Requests: 10  
On the Class Wait List: 55  
On Class Session Wait List(s): 0

**Instructor(s)**  
 Load Add  
**First Last Certified Primary**


**Instructor/Ratio Override**  
☐ Override Student/Instructor Ratio  
Override Comment:   
Override History:   
**Class Supplies**  Add  
**Books**  Add  
**Prerequisites**  Add  
Add Another Clear Save  
Class Registration Attendance & Grading Audit History

# Attendance & Grading Exercises

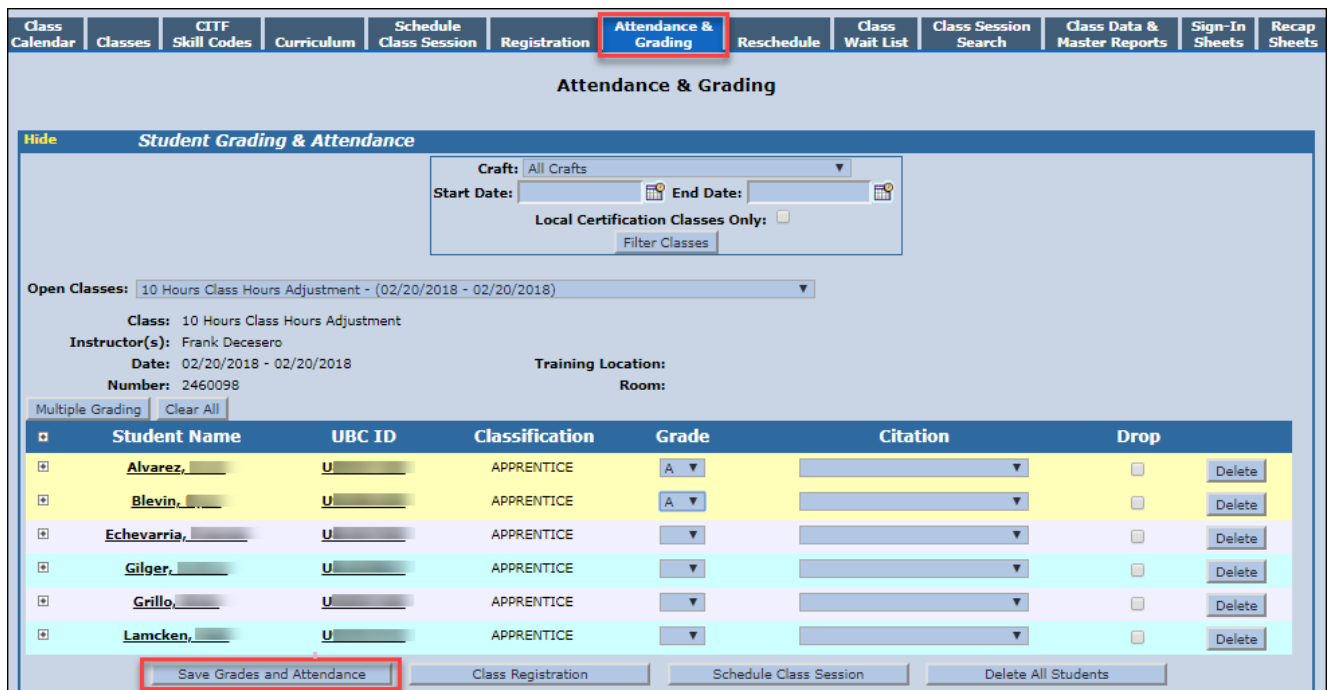
## Grading

Location: Class Management >> Attendance & Grading

**Overview** The Attendance & Grading screen is used to save grades for registered students.

- ✓ **Tips**
- The Class Session must have an instructor saved before you can grade a class
  - A session is considered closed when all students have been graded
  - You cannot change a passing grade to another grade for CITF classes. You must contact the CITF for further assistance
  - Select  to access the Attendance & Grading screen from the Class Calendar

**Exercise 1** Access the Attendance & Grading screen and locate your five Local Program class sessions [Reference the sessions you created on pages 15-16]. Apply your grades and select Save Grades and Attendance. **Note:** Ensure you save some “R” grades for the Reschedule functionality.



**Attendance & Grading**

**Student Grading & Attendance**

Craft: All Crafts

Start Date: End Date:

Local Certification Classes Only: ☐

Filter Classes

Open Classes: 10 Hours Class Hours Adjustment - (02/20/2018 - 02/20/2018)

Class: 10 Hours Class Hours Adjustment

Instructor(s): Frank Decesero

Date: 02/20/2018 - 02/20/2018

Number: 2460098

Training Location: Room:

Multiple Grading Clear All

Student Name	UBC ID	Classification	Grade	Citation	Drop	Delete
Alvarez, [redacted]	U [redacted]	APPRENTICE	A		<input type="checkbox"/>	Delete
Blevin, [redacted]	U [redacted]	APPRENTICE	A		<input type="checkbox"/>	Delete
Echevarria, [redacted]	U [redacted]	APPRENTICE			<input type="checkbox"/>	Delete
Gilger, [redacted]	U [redacted]	APPRENTICE			<input type="checkbox"/>	Delete
Grillo, [redacted]	U [redacted]	APPRENTICE			<input type="checkbox"/>	Delete
Lancken, [redacted]	U [redacted]	APPRENTICE			<input type="checkbox"/>	Delete

Save Grades and Attendance Class Registration Schedule Class Session Delete All Students

## Attendance & Grading Exercises

**Exercise 2** Access the Attendance & Grading screen and locate your Local Certification classes [Reference the sessions you created on pages 17 and 18]. Apply your grades and select Save Grades and Attendance. Students who receive a passing grade, populate the **Qual/Cert No** field and the **Qual/Cert Date** fields. Verify the Qualification Certification information displays on the Student Training History screen. **Note:** Ensure you save some “R” grades for the Reschedule functionality.

The screenshot shows the 'Attendance & Grading' screen. The 'Student Grading & Attendance' section is expanded. The 'Open Classes' dropdown is set to 'FORBO Master Mechanic - (05/15/2018 - 05/15/2018)'. The 'Class' is 'FORBO Master Mechanic', 'Instructor(s)' is 'Robt Ackerman', 'Date' is '05/15/2018 - 05/15/2018', and 'Number' is '2454147'. The 'Training Location' is 'Room:'. The 'Multiple Grading' section is active. The 'Student Name' table shows a student named 'Ball, [redacted]' with 'UBC ID' [redacted], 'Classification' 'APPRENTICE', and 'Grade' 'P'. The 'Qual/Cert Card No.' and 'Qual/Cert Date' fields are highlighted with red boxes. The 'Save Grades and Attendance' button is also highlighted.

**Exercise 3** Within the Attendance and Grading screen locate one of your classes. Select the plus sign next to a student's name and mark the student Tardy and select Save Grades and Attendance. Verify the member record (Dates and Statuses section) now displays the Tardy checkmark.

The screenshot shows the 'Attendance & Grading' screen. The 'Student Grading & Attendance' section is expanded. The 'Open Classes' dropdown is set to 'FORBO Master Mechanic - (05/15/2018 - 05/15/2018)'. The 'Class' is 'FORBO Master Mechanic', 'Instructor(s)' is 'Robt Ackerman', 'Date' is '05/15/2018 - 05/15/2018', and 'Number' is '2454147'. The 'Training Location' is 'Room:'. The 'Multiple Grading' section is active. The 'Student Name' table shows a student named 'Ball, [redacted]' with 'UBC ID' [redacted], 'Classification' 'APPRENTICE', and 'Grade' 'P'. The 'Qual/Cert Card No.' and 'Qual/Cert Date' fields are highlighted with red boxes. The 'Save Grades and Attendance' button is also highlighted. The 'Missed Time (H:MM)' section shows a table with columns for days of the week and a row for 'Week of: 05/14/2018' with a value of '0:00'. The 'Credits Removed' is '0.0'. The 'Tardy' checkbox is checked. The 'Make-Up Time (H:MM)' section shows a table with columns for days of the week and a row for 'Week of: 05/14/2018' with a value of '0:00'. The 'Credits Added' is '0.0'.

## Attendance & Grading Exercises

**Exercise 4** Within the Attendance and Grading screen locate one of your classes. Select the Drop checkbox for a student and select Save Grades and Attendance. Verify the Student Training History displays “Dropped” for the class session.

The screenshot shows the 'Attendance & Grading' interface. The 'Attendance & Grading' tab is selected in the top navigation bar. The 'Student Grading & Attendance' section is visible, showing filters for Craft, Start Date, End Date, and Local Certification Classes Only. The 'Open Classes' dropdown is set to 'FORBO Master Mechanic - (05/15/2018 - 05/15/2018)'. The class details show 'Class: FORBO Master Mechanic', 'Instructor(s): Robt Ackerman', 'Date: 05/15/2018 - 05/15/2018', and 'Number: 2454147'. The 'Training Location' and 'Room' are also indicated. Below the class details, there are tabs for 'Multiple Grading', 'Clear All', 'Multiple Local Certification', and 'Multiple Attachments'. The main table has columns: Student Name, UBC ID, Classification, Grade, Citation, Drop, and Document. The first row shows a student named 'Ball, U' with Classification 'APPRENTICE' and Grade 'U'. The 'Drop' checkbox is checked. At the bottom, there are buttons for 'Save Grades and Attendance', 'Class Registration', 'Schedule Class Session', and 'Delete All Students'.

**Exercise 5** Within the Attendance and Grading screen locate one of your classes. Designate the “I” grade and select the plus sign next the student’s name. Mark Missed Time and verify the Missed Time on the Student Training History screen. Then change the grade to “P” and mark Make-Up Time and verify the Student Training History screen.

The screenshot shows the 'Attendance & Grading' interface, similar to the previous one. The 'Student Grading & Attendance' section is visible. The 'Open Classes' dropdown is set to 'FORBO Master Mechanic - (05/15/2018 - 05/15/2018)'. The class details show 'Class: FORBO Master Mechanic', 'Instructor(s): Robt Ackerman', 'Date: 05/15/2018 - 05/15/2018', and 'Number: 2454147'. The 'Training Location' and 'Room' are also indicated. Below the class details, there are tabs for 'Multiple Grading', 'Clear All', 'Multiple Local Certification', and 'Multiple Attachments'. The main table has columns: Student Name, UBC ID, Classification, Grade, Citation, Drop, and Document. The first row shows a student named 'Ball, U' with Classification 'APPRENTICE' and Grade 'P'. The 'Drop' checkbox is unchecked. Below the table, there are sections for 'Missed Time (H:MM)' and 'Make-Up Time (H:MM)'. The 'Missed Time' section shows a week of 05/14/2018 with a total of 1:00 and Credits Removed of 0.0. The 'Make-Up Time' section shows a week of 05/14/2018 with a total of 1:00 and Credits Added of 0.0. At the bottom, there are buttons for 'Save Grades and Attendance', 'Class Registration', 'Schedule Class Session', and 'Delete All Students'.

# Attendance & Grading Exercises

## Reschedule

Location: Class Management >> Reschedule

**Overview** The Reschedule functionality is utilized when students cannot attend the class session and would like to Reschedule.

- ✓ **Tips**
- Students display on the Reschedule screen when they receive the “R” grade
  - You can generate a report of students to be Rescheduled this month from the Home page
  - The “Reschedule To” field displays all classes with a future date
  - Select “Next Available Class” and the student is added to the Class Wait List for the rescheduled class

**Exercise 1** Access the Reschedule screen and process three Reschedules. Verify the students are now rescheduled into the new class session.

Document the **UBC ID** and the **Reschedule To** class session information:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Class Calendar	Classes	CITF Skill Codes	Curriculum	Schedule Class Session	Registration	Attendance & Grading	Reschedule	Class Wait List	Class Session Search	Class Data & Master Reports	Sign-In Sheets	Recap Sheets
<h3>Reschedule</h3> <p><b>Hide</b> <i>Class Reschedule</i></p> <p>Days Back: 90</p> <p>Student/Class: Blakney, M - U : - OSHA 10 Construction</p> <p>Reschedule From: OSHA 10 Construction (05/28/2018 - 05/28/2018)</p> <p>Reschedule To: Aerial Lift Operator Qualification (12/01/2018 - 12/01/2018)</p> <p>Reason: Employer's Request (Approved)</p> <p>Action Date: 11/30/2018</p> <p>Reschedule</p>												

## Member Record Exercises

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### Custom Master Report

**Location:** Reports >> Student Reports >> Custom Master Report

**Overview** The Custom Master Report option provides the ability to customize Master Reports by Group, Class Sessions or Student Criteria.

✓ **Tips** When generating the report by Class Session the system displays classes scheduled two weeks before and two weeks after the current date.

---

**Exercise 1** Access the Custom Master Report screen and generate reports utilizing the Group, Class Session and Student Criteria options.

### Custom Master Report

**Report By**

Search By: Group ▼

**Group**

Choose a Group below to create a Custom Master Report for that Group.

Group: 3-9-18 Rigging/FL ▼

**Print Sections**

[Select All](#) | [Deselect All](#)

<input type="checkbox"/> Action Notes	<input type="checkbox"/> Committee Meeting Notes	<input type="checkbox"/> Remarks
<input type="checkbox"/> Additional Qualification/Certifications	<input type="checkbox"/> Contractor	<input type="checkbox"/> Upgrade History Data
<input checked="" type="checkbox"/> Address and Contact Information	<input checked="" type="checkbox"/> Dates and Status Information	<input type="checkbox"/> Wage Rate/Work Hours
<input checked="" type="checkbox"/> Certification Dates	<input checked="" type="checkbox"/> General Information	<input type="checkbox"/> Wait Lists
<input checked="" type="checkbox"/> Class History	<input type="checkbox"/> Groups	<input type="checkbox"/> Welding Certifications
<input checked="" type="checkbox"/> Class Hours	<input type="checkbox"/> LMS Updates/Notices	
<input type="checkbox"/> Committee Action Notes		

[Print Master Report](#)

## Member Record Exercises

### Training Verification Card

Location: Member Record >> Training History >> Reprint Training Verification Card/Certificate

**Overview** The Training Verification Card (TVC) displays current training, Upcoming Classes and Certifications and Qualifications and Upcoming Classes.

- ✓ **Tips**
- The TVC generates the moment a member becomes an active member by joining a Local Union
  - The TVC automatically updates every time a member passes a Class Session, Certification or Qualification
  - TRAIN Users may reprint TVC's for active members
  - Upon generating a TVC reprint, the system generates a temporary TVC in PDF format that is valid for two weeks
  - The TVC is mailed to the member's home address

**Exercise 1** Locate three members and process a TVC reprint. Review the temporary TVC and verify the expiration date.

Document the name and UBC ID:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Student Training History**

UBC ID: U: [redacted]  
Greeting First Middle Last Suffix Gender Country SSN/SIN  
M Roland J. II M US [redacted]  
Training Center: NJ, Hammonton - Thomas C. Ober Carpenters Training Center  
Address: 212 Carpenters Union Way Phone: (702) 407-1000 Email: noreply@carpenters.org  
Las Vegas, NV 89119

Reprint Training Verification Card/Certificate

CITF Classes

[Training Verification Card View](#)  
[Online Member Class Registration View](#)

Class Name	Skill Code	Qual/Cert Pending	Class Start Date	Class End Date	Qual/Cert Card No.	Qual/Cert Date	Qual/Cert Expiration	Hours	Grade
Aerial Lift Operator Qualification (CITF)	AERLIFT		11/09/2017	11/09/2017	0001874202387590001			8	Pass

NJ, Hammonton, 77 - Thomas C. Ober Carpenters Training Center



# Member Record Exercises

## Member Training Email Notifications

Location: Member Record >> Email Notifications

**Overview** The Member Training Email Notifications are sent to the primary email address 60 days prior to the Qualification/Certification expiration date and the day of the expiration date.

- ✓ **Tips** The Member Training Email Notification option displays for active members who meet the following requirements:
- Primary Email Address saved on the member record
  - Date of Birth saved on the member record
  - Training Center saved on the member record
  - Hide Training History from Contractor/Training Verification View is not selected
  - Member has not previously selected a Member Training Email Notification preference

**Exercise 1** Access three member records and update the Member Training Email Notification preference to **#1 Opt-In**, **#2 Opt-Out** and **#3 Reset Member's Opt In/Out Preference**. Upon selecting Reset Opt-In/Out preference verify the Notice icon once again displays on the TVC View.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The screenshot shows the 'Apprentice Information' form. The 'Apprentice' tab is selected. The form contains fields for UBC ID, Greeting, First, Middle, Last, Suffix, Gender, Country, SSN/SIN, Training Center, Address, Phone, and Email. Below these fields are sections for Suspension Date, Student Status, Craft, and Specialties. A red box highlights the 'Member Training Email Notifications' section, which includes three radio button options: 'Opt In to Training Email Notifications', 'Opt Out of Training Email Notifications', and 'Opt In/Out Preference Has Not Been Set'. Below this section are checkboxes for 'Enroll in Instructor Certification Program (ICP)', 'Hide Training History from Contractor/Training Verification Card Views', and 'Fed Input'. There are also fields for 'Fed Mailed' and 'Fed Mailed Date'. At the bottom of the form are buttons for 'Save', 'Audit History', 'Master Report', and 'Semi-Annual Statement'.

# New Apprentices Exercises

## Applicant Record

Location: Students menu >> Create Applicant

**Overview** An Applicant is a person that has not fully initiated into the union.

- ✓ **Tips**
- An Applicant Record can originate in TRAIN or Personify
  - Upon saving an Application Date or Indenture Date the record temporarily changes to an Apprentice record. Once TRAIN and Personify sync then the record changes back to an Applicant record

**Exercise 1** Access the Create Applicant screen and create four Applicant Records and populate the following fields:

- |                   |                         |                     |
|-------------------|-------------------------|---------------------|
| - First Name      | - Applicant Status      | - Entry Method      |
| - Last Name       | - Applicant Status Date | - Entry Method Date |
| - Gender          | - Craft                 | - Date of Birth     |
| - SSN/SIN         | - Application Number    | - Primary Address   |
| - Training Center | - Application Date      | - Phone             |

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Applicant**

**Create Applicant**

Greeting First \* Middle Last \* Suffix Gender Country SSN/SIN

Application on File John Smith Male US SSN/SIN Unknown

Training Center \*

NJ, Hammonton - Thomas C. Ober Carpenters Training Center

Applicant Status: Application on File Applicant Status Date: 05/15/2018 Craft: \* Carpenter Application Number: Application Date: Add Specialties:

Student Status: Student Status Date:

Hide Training History from Contractor/Training Verification Card Views



Fed Input Fed Mailed Fed Mailed Date:

Save

# New Apprentices Exercises

**Exercise 2** Indenture your four Apprentices from Exercise 1 and populate the following fields:


- Student Status
- Indenture Date
- Applying to Local
- Student Status Date
- Indenture Level
- Wage Rate
- Applied Date

Apprentice	Training History	Wait List	Upgrade History	Upgrade Exceptions	Work Hours	Books	Evaluation	Committee Actions	Loan Agreement	Student Calendar	Required Curriculum	Welding Certifications	Add'l Qual/Cert	Documents
<b>Apprentice Information</b>														
Apprentice Information Successfully Saved														
 <a href="#">Change Picture</a> 	<b>UBC ID:</b> U90105625													
	<b>Greeting</b> First *		<b>Middle</b>		<b>Last *</b>		<b>Suffix</b>		<b>Gender</b>		<b>Country</b>		<b>SSN/SIN</b>	
	John				Smith				Male		US		<input checked="" type="checkbox"/> SSN/SIN Unknown	
	<b>Training Center *</b> NJ, Hammonton - Thomas C. Ober Carpenters Training Center													
<b>Address</b> 123 Lemon Tree Street Las Vegas, NV 89119			<b>Phone</b> (702) 222-1234			<b>Email</b> Unavailable								
Transfer			Deactivate											
<b>Suspension Date:</b> <input type="text"/> <b>Student Status:</b> Active														
<b>Specialties:</b>														
<b>Craft*</b> Carpenter		<b>Application Number</b>		<b>Application Date</b> 05/15/2018		<input type="button" value="Add"/>								
<input type="checkbox"/> Hide Training History from Contractor/Training Verification Card Views														
<input type="checkbox"/> Fed Input <input type="checkbox"/> Fed Mailed <input type="checkbox"/> Fed Mailed Date: <input type="text"/>														
<input type="button" value="Save"/>														
Audit History			Master Report			Semi-Annual Statement								
<b>Hide</b> <b>Dates and Status Information</b>														
<b>Hold Date:</b> <input type="text"/>					<b>Hold Reason:</b> <input type="text"/>									
<b>Cite Date:</b> <input type="text"/>					<b>Cite Reason:</b> <input type="text"/>									
<b>Cancel Date:</b> <input type="text"/>					<b>Cancel Reason:</b> <input type="text"/>									
<b>LOA Date:</b> <input type="text"/>					<b>LOA Return Date:</b> <input type="text"/>									
<b>Probation Start Date:</b> <input type="text"/>					<b>Probation Reason:</b> <input type="text"/>									
<b>Probation End Date:</b> <input type="text"/>					<b>Applicant Status:</b> Application on File									
<b>Applicant Status Date:</b> 05/15/2018														
<b>Applied Date:</b> 05/15/2018					<b>Indenture Date:</b> 05/15/2018					<b>Indenture Level:</b> 1				
<b>Contractor Intent to Hire Letter Date:</b> <input type="text"/>					<b>Contractor Hire Date:</b> <input type="text"/>					<b>Applying to Local:</b> UBC00251				
<b>Reinstate Date:</b> <input type="text"/>					<b>Apprenticeship Program Completion Date:</b> 05/15/2022					<b>Expected Graduation Date:</b> <input type="text"/>				
<b>Contractor:</b> <input type="text"/>					<b>Semester Start Date:</b> <input type="text"/>									
<b>Trust Contractor:</b> <input type="text"/>														
<b>Contractor at Time of Hire:</b> <input type="text"/>														
<b>Wage Rate:</b> 4 yr apprenticeship program					<b>Benefit Code:</b> <input type="text"/>									
<b>Latest Upgrade Date:</b> <input type="text"/>					<b>Benefit Code 2 Date:</b> <input type="text"/>									
<b>Next Upgrade Date:</b> 11/15/2018					<b>Benefit Code 3 Date:</b> <input type="text"/>									
<b>Journeyman Date:</b> <input type="text"/>					<b>Tardy:</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>									
<b>Current Apprentice 1 Level:</b> 1					<b>Total Class Hours Missed:</b> 0									

## New Apprentices Exercises

**Exercise 3** Access the Evaluation tab of your four Applicants and populate the following fields:

- Class Hours: 240
- Work Hours: 1800
- Previous UBC Apprentice Program Experience: 12
- Other Credit: 12
- Program Months: 48

Apprentice	Training History	Wait List	Upgrade History	Upgrade Exceptions	Work Hours	Books	Evaluation	Committee Actions	Loan Agreement	Student Calendar	Required Curriculum	Welding Certifications	Add'l Qual/Cert	Documents
<b>Evaluation</b>														
		UBC ID: U90105625												
		Greeting		First	Middle	Last	Suffix	Gender	Country	SSN/SIN				
				John		Smith		M	US					
		Training Center: NJ, Hammonton - Thomas C. Ober Carpenters Training Center												
		Address		Phone			Email							
		(702) 222-1234			Unavailable									
		123 Lemon Tree Street Las Vegas, NV 89119												
<b>Hide Evaluation</b>														
<b>Credited</b>														
Class Credits:		Class Hours: 240		Work Hours: 1800		Combined Work/Class Hours:								
<b>Number of Months Credit</b>														
Previous UBC Apprenticeship Program Experience: 12		Current UBC Apprenticeship Program Experience: 0		Other Credit: 12		Program Months: 48 (4 years) ▼								
Last Review Date:		Oral Interview Date:		Oral Interview Time:										
Next Review Date:		Oral Interview Score:		Oral Interview Status: ▼										
Entrance Test Date:		Entrance Test Score:		Entrance Test Status: ▼										
Other Test Date:		Other Test Score:		Other Test Status: ▼										
Orientation Date:		Drawn Number:		Orientation Status: ▼										

# Update Member Record Exercises

## Documents

Location: Member Record >> Documents tab

**Overview** The Documents functionality allows you to upload and categorize documents on a member record.

- ✓ **Tips**
- The document must be in PFD format
  - Users with the appropriate permissions have access to view and update Secure Documents
  - Items uploaded on the Documents tab are not viewable on the TVC

**Exercise 1** Access the Documents tab and upload a document to three member records.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

The screenshot displays the 'Documents' tab within a member record interface. The top navigation bar includes various tabs such as 'Apprentice', 'Training History', 'Wait List', 'Upgrade History', 'Upgrade Exceptions', 'Work Hours', 'Books', 'Evaluation', 'Committee Actions', 'Loan Agreement', 'Student Calendar', 'Required Curriculum', 'Welding Certifications', 'Add'l Qual/Cert', and 'Documents' (which is highlighted with a red box). Below the navigation bar, the 'Documents' section is titled and contains a member's profile information. The profile includes a photo, UBC ID, Greeting, First, Middle, Last, Suffix, Gender, Country, and SSN/SIN. The 'Training Center' is listed as 'NJ, Hammonton - Thomas C. Ober Carpenters Training Center'. Below the profile, there are fields for 'Address', 'Phone', and 'Email'. The 'Documents' section itself has a 'Hide' button and an 'Add Files' button (highlighted with a red box). Below this, there is a form for adding a document, including a '\*Name' field (with a character count), a '\*Category' dropdown, a 'Secured' checkbox, and a 'Description' text area. At the bottom of the document upload section, there are two buttons: 'Cancel Document Upload(s)' and 'Save Document(s) and Description(s)' (highlighted with a red box). A 'Document Category' dropdown is located at the very bottom of the interface.

# Update Member Record Exercises

## Remarks

Location: Member Record >> Remarks section

**Overview** Provides the option to add a note or general comment regarding the member.

- ✓ **Tips**
- Notes entered on the Attendance & Grading screen are automatically added to the Remarks section on the member record
  - Users with access to the member record can edit and delete all Remarks



**Exercise 1** Add Remarks to four of your member records. Verify the Remarks on the student's Audit History. [Example: On Vacation, Issued Tools, etc.]

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Hide** **Remarks**

Remark:

Date	Remark	Username	
03/01/2018	Need copy of Driver License	HTILTON	 



**Exercise 2** Edit one of your Remarks by selecting the pencil icon. Delete one of your Remarks by selecting the Trash Can icon.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_

**Hide** **Remarks**

Remark:

Date	Remark	Username	
03/01/2018	Need copy of Driver License	HTILTON	 

# Update Member Record Exercises

---

## Action Notes

**Location:** Member Record >> Action Notes section

**Overview**      Action Notes are used when you need to follow up on tasks involving a member.

- ✓ **Tips**
- Action Notes are viewable in the Alerts/Follow-up section of the Home page
  - The Action Notes icon  displays on all screens within the member record


---

**Exercise 1**      Add Action Notes to four of your member records. Verify the Action Note on the Audit History. [Example: Owes Money for Books, Required to sign documentation, etc.]

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Create Action Note**

\* **Action Date:** 03/01/2018 

\* **Subject:** Owes Book Money

\* **Description:** John Smith owes money for the Stairs 101 book.

Cancel

Save

## Update Member Record Exercises

**Exercise 2** Follow-up on two of your Action Notes and add a reply by selecting the black arrow.  
[Example: Paid Money, Signed Documentation, etc.]

Document the name and UBC ID:

1. \_\_\_\_\_

2. \_\_\_\_\_

The screenshot shows the 'Action Notes' interface. At the top, there's a 'Hide' button and a title 'Action Notes'. Below is a table with columns: Action Date, Subject, Status, Created By, and Created On. The first row shows an action note from 03/01/2018 with subject 'Owes Book Money', status 'OPEN', created by 'HTILTON', and created on '03/01/2018 at 07:23:30 AM'. To the right of this row are a black arrow icon and a trash icon. Below the table, the 'Description' field contains 'John Smith owes money for the Stairs 101 Book.' Below this, there's a section for editing the note with fields for Subject, Action Date, Created By, Status (set to 'Open'), and a Description field. The Description field contains 'John Smith advised he will pay for the book tomorrow.' At the bottom are 'Save' and 'Cancel' buttons.

**Exercise 3** Complete and close two Action Notes by selecting the black arrow and select the Status of Closed.

Document the name and UBC ID:

1. \_\_\_\_\_

2. \_\_\_\_\_

The screenshot shows the 'Action Notes' interface. At the top, there's a 'Hide' button and a title 'Action Notes'. Below is a table with columns: Action Date, Subject, Status, Created By, and Created On. The first row shows an action note from 03/01/2018 with subject 'Owes Book Money', status 'OPEN', created by 'HTILTON', and created on '03/01/2018 at 07:23:30 AM'. To the right of this row are a black arrow icon and a trash icon. Below the table, the 'Description' field contains 'John Smith owes money for the Stairs 101 Book.' Below this, there's a section for editing the note with fields for Subject, Action Date, Created By, Status (set to 'Closed'), and a Description field. The Description field contains 'John Smith paid in full for the Stairs 101 book.' At the bottom are 'Save' and 'Cancel' buttons.



# Update Member Record Exercises

## Work Hours

Location: Member Record >> Work Hours tab

**Overview** Apprentices are required to complete a minimum amount of Work Hours in order to become a Journeyman. Work Hours are tracked on the Work Hours tab of the member record.

- ✓ **Tips**
- There are four types of Work Hours: On The Job (OJT) Hours, Upgrade Exception Hours, Evaluation Hours and Trust Hours
  - The Apprentices without Work Hours This Month report is located on the Home page

**Exercise 1** Add Work Hours to three of your members from the Work Hours tab on the member record.  
**Note:** Populate the Date, Hours, Work Type and Contractor.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Student Work Hours History**

UBC ID: U  
Greeting First Middle Last Suffix Gender Country SSN/SIN  
Emily E F US  
Training Center:  
NJ, Hammonton - Thomas C. Ober Carpenters Training Center  
Address Phone Email  
212 Carpenters Union Way (702) 407-1000 noreply@carpenters.org  
Las Vegas, NV 89119

**Work Hours Input**

From\*: 12/03/2018 To\*: 12/03/2018 Hours\*: 10 Work Type: Basic Skills  
Contractor: A & A Contracting Tile - 11 Rosewood Lane, Boonton, NJ 07005  
Notes:  
Save Hours Clear

## Update Member Record Exercises

Location: Students menu >> Work Hours Entry

**Exercise 2** Add Work Hours to one of your Groups from the Work Hours Entry screen. **Note:** Populate the Date, Hours, Work Type and Contractor.

Work Hours Entry

Search

Student Status:

Union Status:

Classification:

Craft:

Contractor:

Group:

UBC ID/SSN/SIN:

First Name:

Last Name:

Class Session

Start Date:  End Date:

\*Double-click a record to add Work Hours to it.

UBC ID	Name	Local	Classification	Union Status	Report
U	Azizuddin	UBC00255	APPRENTIC1	ARRSASSESS	
U	Shamar K	UBC00255	APPRENTIC2	GOODSTANDG	
U	Travis S	UBC00255	APPRENTIC1	GOODSTANDG	
U	Daniel	UBC00255	APPRENTIC2	GOODSTANDG	
U	Salvatore J	UBC00255	APPRENTIC1	GOODSTANDG	
U	Michael	UBC00255	MEMBER	GOODSTANDG	
U	Juan C	UBC00255	APPRENTIC2	GOODSTANDG	
U	Stephen	UBC00255	MEMBER	GOODSTANDG	
U	Gregory S	UBC00255	MEMBER	GOODSTANDG	
U	Corey J	UBC00255	APPRENTIC1	GOODSTANDG	
U	Joshua J	UBC00255	APPRENTIC1	GOODSTANDG	

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# Update Member Record Exercises

## Books

Location: Member Record >> Books tab

**Overview** The Books screen provides users with a place to document any books given to a member or purchased by a member.

✓ **Tips** You have the option to generate a Student Books Report from the member record.

**Exercise 1** Add Books to three of your member records. Review the Student Books Report and Audit History.

Document the name and UBC ID:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Books**

UBC ID: U

Greeting First Middle Last Suffix Gender Country SSN/SIN  
Mr. Azizuddin M US

Training Center:  
NJ, Hammonton - Thomas C. Ober Carpenters Training Center

Address Phone Email  
212 Carpenters Union Way (702) 407-1000 noreply@carpenters.org  
Las Vegas, NV 89119

**Books**

Training Center Books: Scaffold 101 (1234) - MNL Add

Date	Item Number	Description	Prod Line	Unit/Measure	Unit Cost
12/03/2018	978-0-8269-0800-1	Carpentry 5th Edition Text	BKS	20	10.00

Total: 10.00

Student Books Report

## Update Member Record Exercises

### Additional Qualifications/Certifications

Location: Member Record >> Add'l Qual/Cert Tab

**Overview** The Additional Qualification/Certification screen allows you to track Additional Qualifications and Certification that are not associated with a Local Program class or CITF class.

- ✓ **Tips**
- Track training provided by a 3<sup>rd</sup> party
  - List is managed by the CITF
  - May have an Expiration Date, Hours and a Document upload option
  - Displays on the TVC

**Exercise 1** Add Additional Qualifications/Certifications to three of your member records. Verify the Additional Qualification/Certifications now display on the Student Training History and the member's TVC View.

Document the name and UBC ID:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Additional Qualifications/Certifications**

UBC ID: U \_\_\_\_\_

Greeting First Middle Last Suffix Gender Country SSN/SIN  
Michael A \_\_\_\_\_ M US \_\_\_\_\_

Training Center:  
NJ, Hammonton - Thomas C. Ober Carpenters Training Center

Address Phone Email  
212 Carpenters Union Way (702) 407-1000 noreply@carpenters.org  
Las Vegas, NV 89119

**Add Qualification/Certification**

\*Qualification/Certification Name: TWIC (Transportation Worker Identification Credential) x

Description: \_\_\_\_\_

Skill Codes: 

Code	Description	CITF
TWIC	AQC-Transportation Worker Identif Cred	Y

\*Date Issued: 12/03/2018 Qual/Cert Expiration Date: 12/03/2020

Qual/Cert Number/Description: \_\_\_\_\_ Document/Certificate: Choose File No file chosen

Hours: 40

Clear Create

# Upgrade Exercises

## Upgrade Process

Location: Students menu >> Upgrades

**Overview** The Upgrade Process screen allows you to award multiple Upgrades at once.

✓ **Tips** To be eligible for an upgrade the apprentice must have the following on the member record:

- Wage Rate
- Indenture or Reinstatement Date
- Active Union Status [Good Standing, Arrears, Arrears Assess, Arrears Assess Work or Transfer]
- Active Apprentice Record [No Hold, Cite, or Cancellation Date/Reason on the member record]

Upon processing an upgrade the Latest Upgrade Date, Next Upgrade Date, and Current Apprentice Level fields are updated on the member record.

**Exercise 1** Navigate to the Upgrades screen and process five upgrades. After processing an Upgrade verify the following fields updated within the Dates and Status Information section of the member record: Latest Upgrade Date, Next Upgrade Date and Current Apprentice Level.

Document the name and UBC ID:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Upgrades

Hide

Process Upgrades

Wage Rate: 4 yr apprenticeship program

	Name	UBC ID	Indenture Date	Current Pay Level	New Pay Level	Work Hours	Class Hours	Latest Upgrade Date	Next Upgrade Date	New Upgrade Date	Borrowing from Next Level
<input type="checkbox"/>	Tozer, _____	U _____	11/01/2016	2	3	1900.00	224.00	09/12/2017	03/12/2018	12/03/2018	
<input type="checkbox"/>	Wolfinger, _____	U _____	05/07/2016	3	4	2500.00	512.00	09/12/2017	03/12/2018	12/03/2018	
<input type="checkbox"/>	Yoder, _____	U _____	02/03/2017	1	2	1200.00	216.00	08/03/2017	02/03/2018	12/03/2018	

Total number of apprentices eligible for an Upgrade: 3

Cancel Upgrade

# Upgrade Exercises

## Upgrade Exceptions

Location: Member Record >> Upgrade Exceptions tab

**Overview** The Upgrade Exceptions screen is used to process exceptions to the upgrade process.

- ✓ **Tips** The Apprentice must have the following to process an Upgrade Exception:
- Wage Rate
  - Indenture or Reinstatement Date
  - Active Union Status [Good Standing, Arrears, Arrears Assess, Arrears Assess Work or Transfer]
  - Active Apprentice Record [No Hold, Cite, or Cancellation Date/Reason on the member record]

**Exercise 1** Utilizing the Upgrade Exception functionality process a Merit and increase the Level for a member.

Document the name, UBC ID and new Level:

**Upgrade Exceptions**

UBC ID: U[redacted]

Greeting First Middle Last Suffix Gender Country SSN/SIN  
Altin M US \*\*\*\*\*

Training Center:  
MA, Millbury - New England Carpenters Training Center

Address Phone Email  
300 Main St Apt 5 (857) 266-0051 Unavailable  
Woburn, MA 01801-5023

**Merit/Demerit/Reevaluation**

Current		
Pay Level	Work Hours	Class Hours
3	844	44

Effective Date: 12/03/2018

Type: Merit

Level: 4

Work Hours: 100

Class Hours: 50

Reason: Submitted Work Reports.

Save

## Upgrade Exercises

**Exercise 2** Utilizing the Upgrade Exception functionality process a Demerit and decrease the Level for a member.

Document the name and UBC ID:

Apprentice

Training History

Wait List

Upgrade History

Upgrade Exceptions

Work Hours

Books

Evaluation

Committee Actions

Loan Agreement

Student Calendar


Required Curriculum

Welding Certifications

Add'l Qual/Cert

Documents

Upgrade Exceptions



**UBC ID:** U

**Greeting** **First** **Middle** **Last** **Suffix** **Gender** **Country** **SSN/SIN**  
Jodie Rogers  F US \*\*\*\*\*


**Training Center:**  
LA, Baton Rouge - Louisiana Carpenters Regional Council Training Center

**Address** **Phone** **Email**  
748A S Eugene St (225) 939-2461 jodiebienvu@gmail.com  
Baton Rouge, LA 70806-5472

Hide

Merit/Demerit/Reevaluation

Current		
Pay Level	Work Hours	Class Hours
4	3558.5	246

**Effective Date:** 12/03/2018 

**Type:** Demerit

**Level:** 3

**Work Hours:**

**Class Hours:**

**Reason:**   
Level Correction

Save

## Upgrade Exercises

**Exercise 3** Utilizing the Upgrade Exception functionality process a Reevaluation. The member will remain at the same Level. Add Work Hours and Class Hours or reduce the amount of Work Hours and/or Class Hours by adding a minus sign before the number (-50).

Document the name and UBC ID:

Apprentice

Training History

Wait List

Upgrade History

Upgrade Exceptions

Work Hours

Books

Evaluation

Committee Actions

Loan Agreement

Student Calendar


Required Curriculum

Welding Certifications

Add'l Qual/Cert

Documents

Upgrade Exceptions



UBC ID: U

Greeting First Middle Last Suffix Gender Country SSN/SIN

M Jesse T

Training Center:

ON, London - Local 1946 Carpenters Union Training Centre

Address

212 Carpenters Union Way

Las Vegas, NV 89119

Phone

(702) 407-1000

Email

noreply@carpenters.org

Hide

Merit/Demerit/Reevaluation

Pay Level	Current Work Hours	Class Hours
3	1901.75	6.5

Effective Date: 12/04/2018

Type: Reevaluation

Level: 3

Work Hours: 100

Class Hours: 50

Reason: Hours Credit

Save



## Upgrade Exercises

---

### Application for Journeyman Completion Certificates

**Location:** Students menu >> Journeyman Certification

**Overview** An apprentice that successfully completed the requirements of an Apprenticeship Program is eligible to receive a Journeyman Certificate. The Apprentice record must have a Wage Rate, Indenture Date or Reinstatement Date.

- ✓ **Tips**
- Must be Indentured into a UBC Apprentice Training Program
  - Completed training under the jurisdiction of a UBC Apprenticeship Program
  - Have at least one-year UBC Apprenticeship Program Experience
  - Be an Active Member of the Union
  - Contact the CITF directly for Journeyman Certificate Reprints
  - The Apprenticeship Program Completion Date range field cannot be greater than 6 months

---

**Exercise 1** Navigate to the Journeyman Certification page and search for eligible students. Generate a Journeyman Certificate Application and review the PDF document.

### Journeyman Certification

#### Journeyman Certification

\* **Craft:**

Acoustical Carpenter  
Cabinetmaker  
Carpenter  
Diver  
Drywall

\* **Apprenticeship Program Completion Date:** From:  To:

**Include Students with a Journeyman Certificate:** ☐

**Include Students Found on Another Application Which Has Not Been Processed:** ☐

# Custom Search Exercises

## Custom Searches

Location: Reports >> Custom Searches

**Overview** Custom Searches are queries you create and save in TRAIN.

- ✓ **Tips**
- Select only the specific criteria that you need [Less is more with Custom Searches]
  - You choose what information you want displayed on the report [Display Fields]
  - “Null” option means the field is not populated with data
  - “Not Null” option means the field is populated with data

**Exercise 1** Generate a “2018 Class Sessions” report displaying all class sessions within a specific date range.

Select **Step #1** and then select **Display Field Options**. The **Available Display Fields** popup is displayed. Utilizing the **Display Fields Filter** search for the following Display Fields and double click the name within the **Available** section:

- |                     |                    |
|---------------------|--------------------|
| 1. FIRST NAME       | 6. CLASS END DATE  |
| 2. LAST NAME        | 7. FINAL GRADE     |
| 3. UBC_ID           | 8. INSTRUCTOR NAME |
| 4. CLASS NAME       |                    |
| 5. CLASS START DATE |                    |

The screenshot shows a web application interface for creating custom searches. On the left, a sidebar is titled 'Step #1 - Select your Display Fields' and contains two buttons: 'Display Field Options' and 'Display Field Sort Order'. The 'Display Field Options' button is highlighted with a red box. The main content area on the right is titled 'My Report' and is currently empty. At the bottom of the sidebar, there are four buttons: 'Step #2 - Select your Search Options', 'Step #3 - Save Search and Run Report', 'Shared Searches', and a 'Run Report' button.

Select **OK** to close the Available Display Fields popup.

## Custom Search Exercises

Within the **Step #1** section select **Display Field Sort Order** option.

Step #1 - Select your Display Fields

Display Field Options

Display Field Sort Order

My Report

Display Field Options

1. FIRST NAME
2. LAST NAME
3. UBC\_ID
4. CLASS NAME
5. CLASS START DATE
6. CLASS END DATE
7. FINAL GRADE

The **Choose the sort order of fields** popup is displayed. Utilizing the **Sort Fields Filter** search for the following Display Field and double click the name within the **Available** section:

1. Class End Date

Select **OK** to close the Choose the sort order of fields popup.

Choose the sort order of fields.

Filter:

Sort Fields

Double click or drag selections.

Filter: class end date

Available:

CLASS END DATE

Selected:

Collapse All

OK

## Custom Search Exercises

Select **Step #2** and then select **Curriculum Information**.

Step #1 - Select your Display Fields

Step #2 - Select your Search Options

Additional Qualifications/Certifications

Curriculum Information

Learning Management System (LMS) Information

Student General Information

Student Training Information

Step #3 - Save Search and Run Report

Shared Searches

My Report

**Display Field Options**

1. FIRST NAME
2. LAST NAME
3. UBC\_ID
4. CLASS NAME
5. CLASS START DATE
6. CLASS END DATE
7. FINAL GRADE
8. INSTRUCTOR NAME

**Display Field Sort Order**

1. CLASS END DATE

Run Report

The **Curriculum Information Search Options** popup is displayed. Select the following Curriculum Information:

1. **Class Names:** All Class names
2. **Class Start Date Range:** 1/1/2018 – 12/31/2018

Select **OK** to close the Curriculum Information Search Options popup.

Curriculum Information Search Options

Filter:

Certificate Expiration Date Range

Class Names

Class Semester

Class Start Date Range

Class Training Center(s)

Class Types

DET Class Names

Curriculum Information

**Class Names**  
All Class Names

**Class Start Date Range**  
From: 01/01/2018  
To: 12/31/2018

Expand All

OK

## Custom Search Exercises

Within **Step #2** select the **Student General Information** option.

Step #1 - Select your Display Fields

**Step #2 - Select your Search Options**

Additional Qualifications/Certifications

Curriculum Information

Learning Management System (LMS) Information

**Student General Information**

Student Training Information

Step #3 - Save Search and Run Report

Shared Searches

My Report

Display Field Options

1. FIRST NAME
2. LAST NAME
3. UBC\_ID
4. CLASS NAME
5. CLASS START DATE
6. CLASS END DATE
7. FINAL GRADE
8. INSTRUCTOR NAME

Display Field Sort Order

1. CLASS END DATE

Curriculum Information

**Class Names**  
All Class Names

**Class Start Date Range**  
From: 01/01/2018  
To: 12/31/2018

Run Report

The **Student General Information Search Options** popup is displayed. Utilizing the filter search for '**Locals**'. Select the '**Locals**' option and then double click **All Locals**.

Select **OK** to close the Student General Information Search Options popup.

**Student General Information Search Options**

Filter: local

**Locals**

Double click or drag selections.

Filter:

Available:

**All Locals**

UBC00251

UBC00252

UBC00253

UBC00254

UBC00255

Selected:

Expand All

OK

## Custom Search Exercises

Select **Step #3**, populate a **Report Name** and select Save. Your new report now displays within the **My Saved Searches** section.

Select **Run Report** to generate the export displaying students who received a grade in 2018.

The screenshot displays a web interface for custom searches, divided into three main sections: Step #1, Step #2, and Step #3. Step #3, 'Save Search and Run Report', is the active section. It contains a 'Report Name' field with the text 'Classes Graded - 2018', a 'Save' button, and a 'My Saved Searches' list also containing 'Classes Graded - 2018'. Below these are buttons for 'Load Saved Search', 'Delete Saved Search', 'Edit Saved Search', 'Run Selected', 'Clear', and 'Share Saved Search'. To the right, the 'My Report' section shows configuration options: 'Display Field Options' (listing 8 fields), 'Display Field Sort Order' (listing 1 field), 'Curriculum Information' (with 'Class Names' and 'Class Start Date Range' set to 01/01/2018 to 12/31/2018), and 'Student General Information' (with 'Locals' set to 'All Locals'). At the bottom right, a 'Run Report' button is visible. The bottom of the interface has a 'Shared Searches' section on the left and a 'Run Report' button on the right.

Step #1 - Select your Display Fields

Step #2 - Select your Search Options

Step #3 - Save Search and Run Report

Report Name:

Classes Graded - 2018

Save

My Saved Searches:

Classes Graded - 2018

Load Saved Search

Delete Saved Search

Edit Saved Search

Run Selected

Clear

Share Saved Search

My Report

Display Field Options

1. FIRST NAME
2. LAST NAME
3. UBC\_ID
4. CLASS NAME
5. CLASS START DATE
6. CLASS END DATE
7. FINAL GRADE
8. INSTRUCTOR NAME

Display Field Sort Order

1. CLASS END DATE

Curriculum Information

**Class Names**  
All Class Names

**Class Start Date Range**  
From: 01/01/2018  
To: 12/31/2018

Student General Information

**Locals**  
All Locals

Shared Searches

Run Report