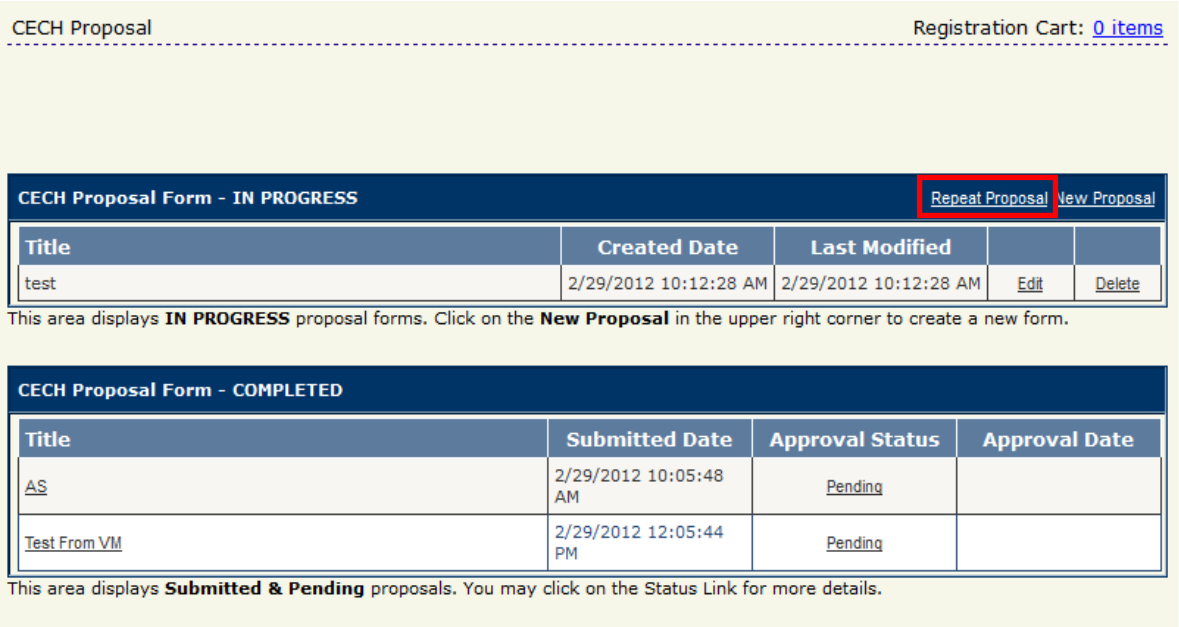
Submitting a Repeat Proposal

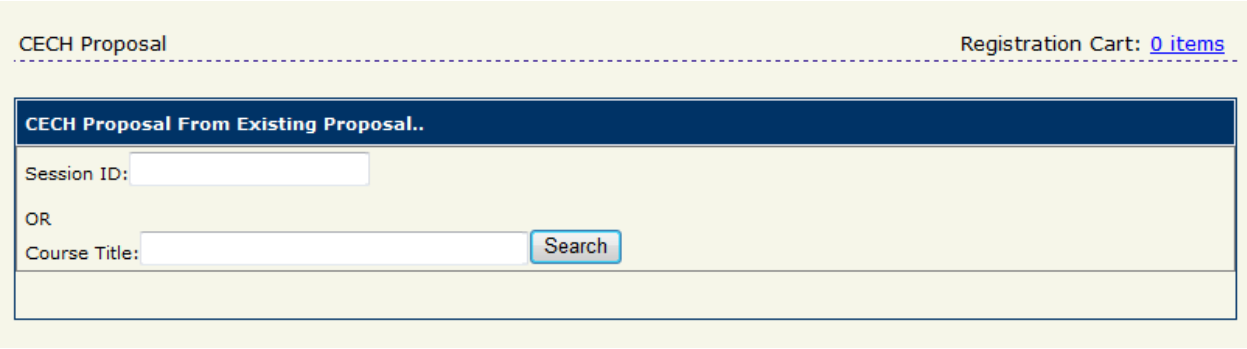
Once you have created a proposal for a session in the system, you may use the Repeat Proposal feature to request approval the next time you offer a similar program.

To create a repeat proposal:

- Log into the ESD 105 System
- Click on the CECH Proposal link
- Click on the Repeat Proposal Link in the CECH Proposal screen



- The system will open the following window:



- Enter the Session ID or the Title of the Proposal that you have previously entered in the system.
- The system will open the screens for proposal

- Modify the data that displays in the proposal screens as necessary
- Submit the proposal for approval.

Adding Additional Clock Hour Sessions

Once you have an approved proposal in the system, you may create additional meeting dates, times, and locations for the program. To do this, you will log into the administrative website.

Login

Access the *escWorks* login page by entering **http://www.escworks.net** into an Internet browser.

Enter your *escWorks* ID, your password and your customer ID and click the ***Sign In*** button. Your *escWorks* ID is your email address. The password is the same that you used you create a proposal.

escWorks ID: (email address)

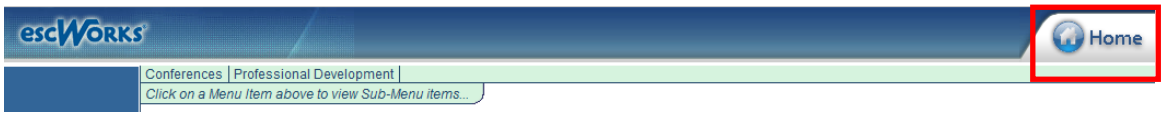
Password: XXXXXX

Customer ID: wa_esd105

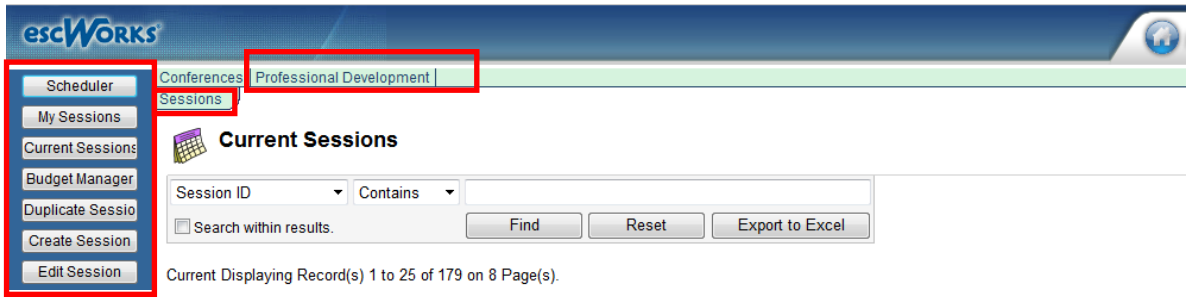
The next few pages will review how to use the administrative website. If you only need a reminder of how to create, edit, and schedule a session, jump to page 35.

Navigating in the System

Upon logging in, the system will take you to the Home Screen. The menu items on this screen will vary according to the permissions assigned to the user. You may click on the ***Home*** button to return to this screen from anywhere in the system.



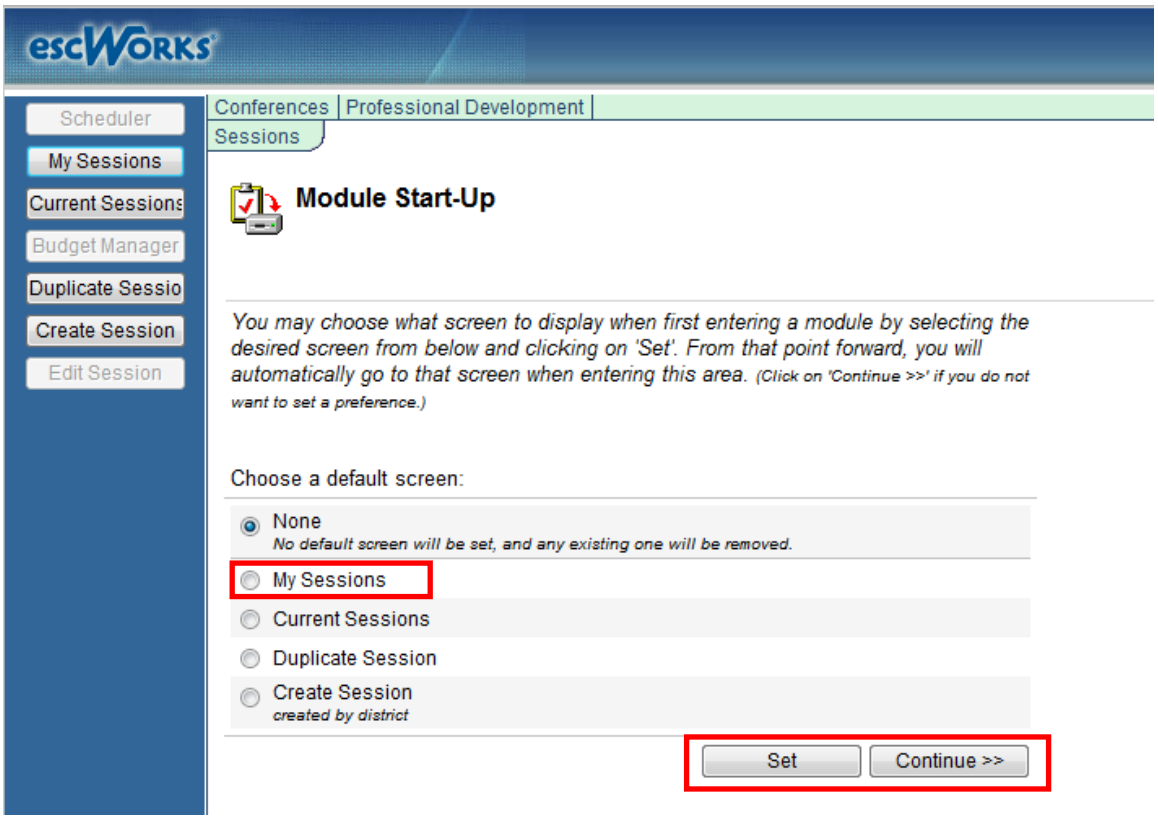
Each Tab in the main menu is for a different module in the system. Click on a menu item to view the sub-menu items available for this module. Once you click on a sub-menu, the control bar will appear in the blue bar in the left hand side of the page. The buttons in the control bar are specific to the module that you are working in.



Module Start-Up

The first time a module is opened, the system will require you to select a default screen setting. Choose the screen you would like to automatically open each time this module is selected. The default screen setting may be changed at any time by selecting the ***Module Settings*** link in the control bar.

To select the preferred default screen click the desired screen, click ***Set***, and then click ***Continue***.



Sessions

Sessions are the individual workshops that are offered for registration. When creating a session, you will specify items such as the instructor, the fees, and the dates for the workshop.

Note: When a proposal is approved on the customer website, the Clock Hour Event Title is created as well as an individual session. Additional sessions for the Title are created here.

Creating a New Session

There are several screens used in the creation of a Session. Use the ***Next*** and ***Previous*** buttons to navigate through the screens.

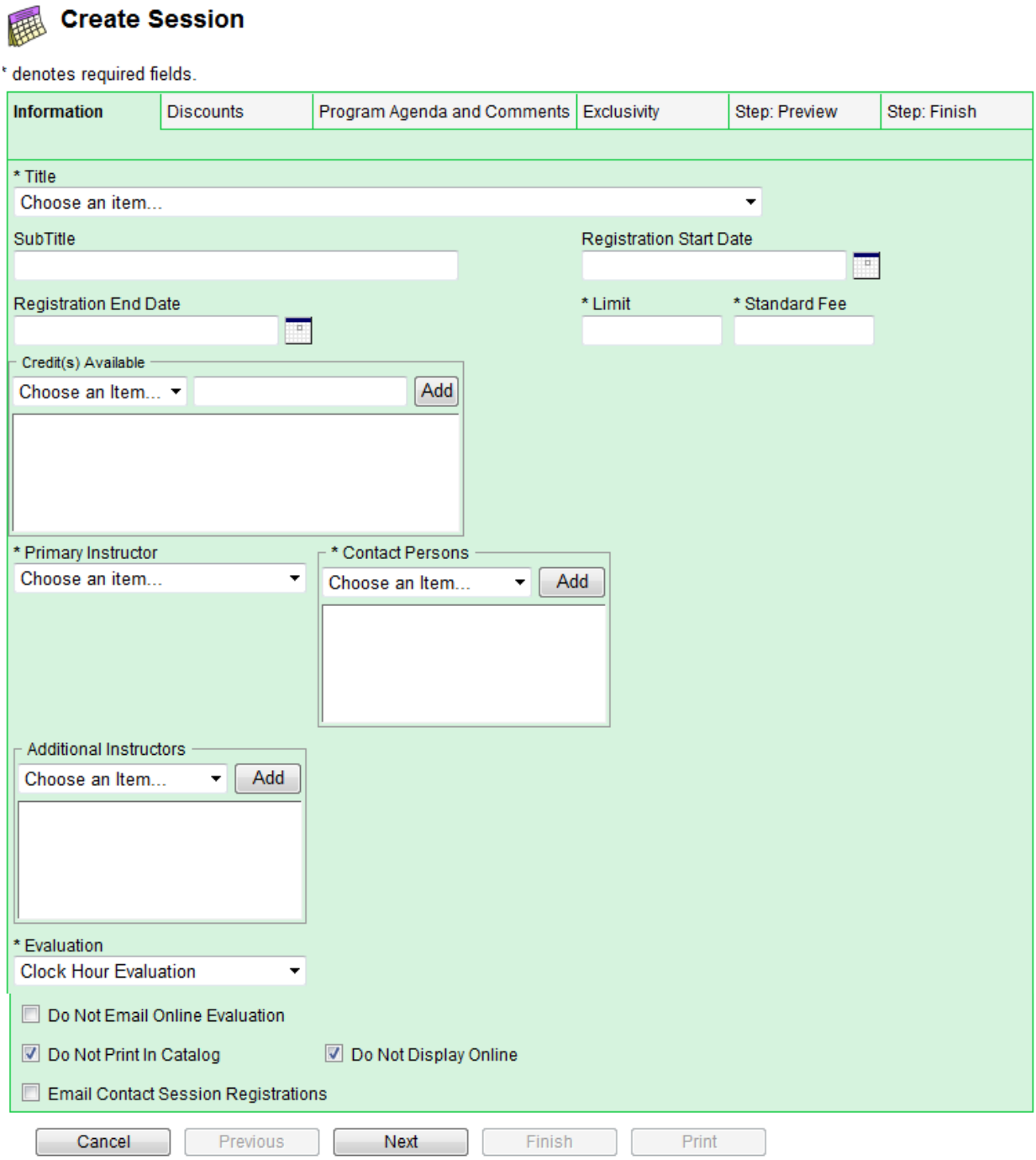
To Create a New Session:

- Select ***Professional Development*** from the main menu
- Select ***Sessions*** from the sub-menu
- Click on the ***Create Session*** Button

The Create Session Button will open the following form:

Session Screen 1: Information

- Enter the appropriate information in each field and click ***Next*** to move to the next screen



Common Fields used on the Information Screen:

Title:
Choose the appropriate Event Title from the ***Title*** dropdown list. This dropdown list is populated from the Active Event Titles.

Registration Start Date:
This date is the first day that participants may begin to register for the workshop. Use the calendar icon or manually enter the date. If this field is left empty, the system will default to the date the workshop is created. This date is also the trigger that tells the system to send the subscription emails to notify participants that the session is open for registration.

Registration End Date:
This date is the last day participants may sign up for this workshop. Use the calendar icon or manually enter the date. If left blank, the system will automatically set the registration end date with the system default.

Limit:
Enter the maximum number of participants that may attend this workshop.

Standard Fee:
Enter the standard fee that will be charged for the workshop. If the workshop does not have a fee, enter a zero. **Note:** Use numbers only. No commas are allowed in this field. For example, enter 1000 for $1,000.00

Credits Available:
Enter the type(s) of **Credit** the participant will receive for attending this Workshop from the Credits dropdown, enter the **amount of credits** in the next field and click ***Add***. Multiple Credit Types may be entered.

Primary Instructor:
Select the name of the Primary Instructor for this workshop from the dropdown menu. This list is populated by those staff or participants who have the Instructor role assigned to them in the User Manager module.

Contact Person:
Select the name of the person who should be contacted if there are questions regarding this workshop. This list is populated by clicking the Contact Person option in the Roles section of the User Manager. Select the appropriate name(s) from the dropdown menu.

Additional Instructors:
Use the dropdown menu to select additional instructors for the workshop and click ***Add***. Enter multiple instructors if appropriate.

Evaluation:
Use the dropdown menu to select the appropriate online evaluation to be emailed to the attendees after the attendance has been taken in the workshop. Clock Hour Evaluation is the mandatory evaluation for clock hour events.

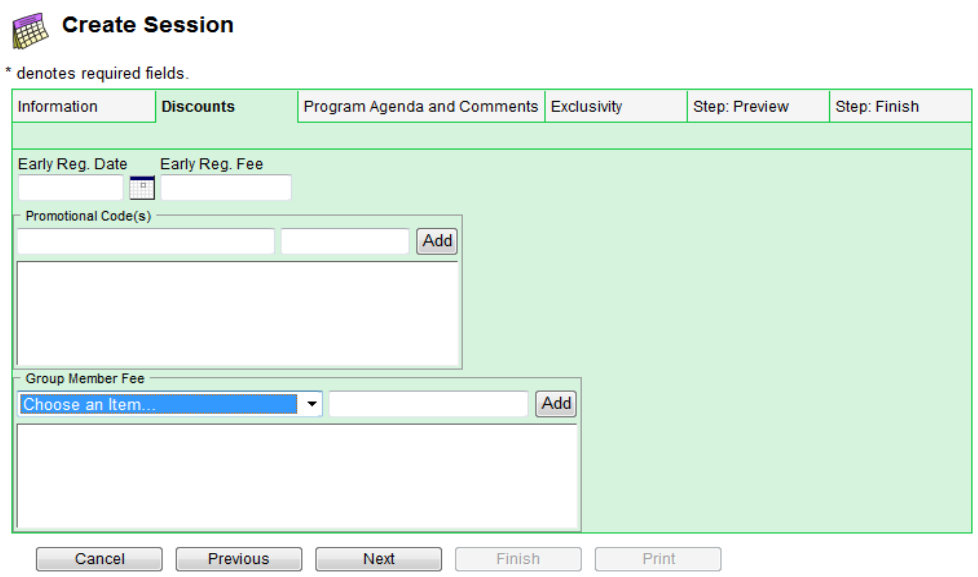
Do Not Email Online Evaluation:
Check this box if you do not wish for an online evaluation to be sent. Results from printed evaluations may be entered in to the system via the Evaluation Manager.

Do Not Print in Catalog:
Check this box if this workshop is not going to be included in the catalog report.

Email Contact Session Registrations:
Check this box if the session contact person should be emailed whenever someone registers for this session.

Do Not Display Online:
Check this box if you do not wish for this workshop to display in the online catalog.

Session Screen 2: Discounts



Common Fields used on the Discounts Screen:

Early Reg. Date:
Enter the date that the participant must register before in order to receive the early registration price for the workshop. For example, if you enter 3/15/2008 as the early registration date, anyone registering after 11:59 PM on the 3/14/2008 will not receive the early registration discount.

Early Reg. Fee:
Enter the discounted price that the participant will receive if they register by the Early Registration date entered in the previous field.

Promotional Code(s):
Enter a Promotional Code that may be used to apply a discounted price to this workshop. Enter the Promotional Code in the first field and the discounted price in the second field. Click ***Add***. Multiple promotional codes and amounts may be used.

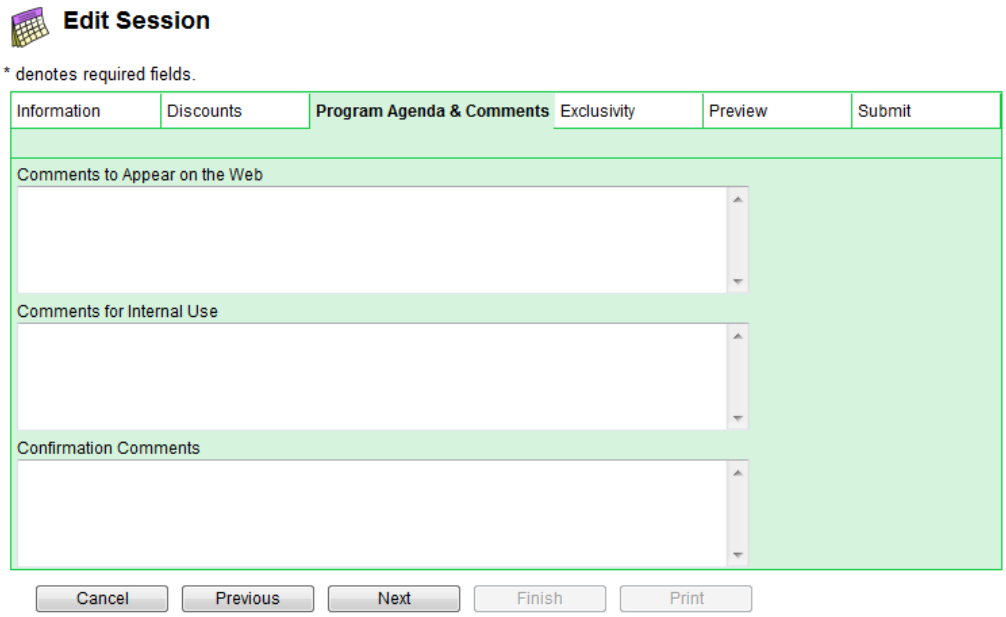
Note: The Fee entered in the Promotional Code screen is the amount that the participant will be charged for the session if they enter this promotional code. For example, if a promotional code of Promo, 30 is entered, the participant that uses this code will be charged the discounted price of $30.00 for the session.

Member Group Fees:
Select the group to receive the discounted fee from the dropdown menu. Enter the discounted fee that will apply to members of the group into the text field. Click ***Add***. Multiple Group Member Fees may be used in one workshop.

- Click the ***Next*** button to Continue to the Comments Screen

Session Screen 3: Comments

The Program Agenda and Comments screen is used to enter the Program Agenda Outline, Program Objectives, Documented Need, and additional comments about the Session. The fields on this screen will display the comments entered in different areas of *escWorks*.



Common Fields used on the Comments Screen:

Comments to Appear on Web:
Comments entered in this field will appear in the Session Detail section of the online catalog and on the confirmation page.

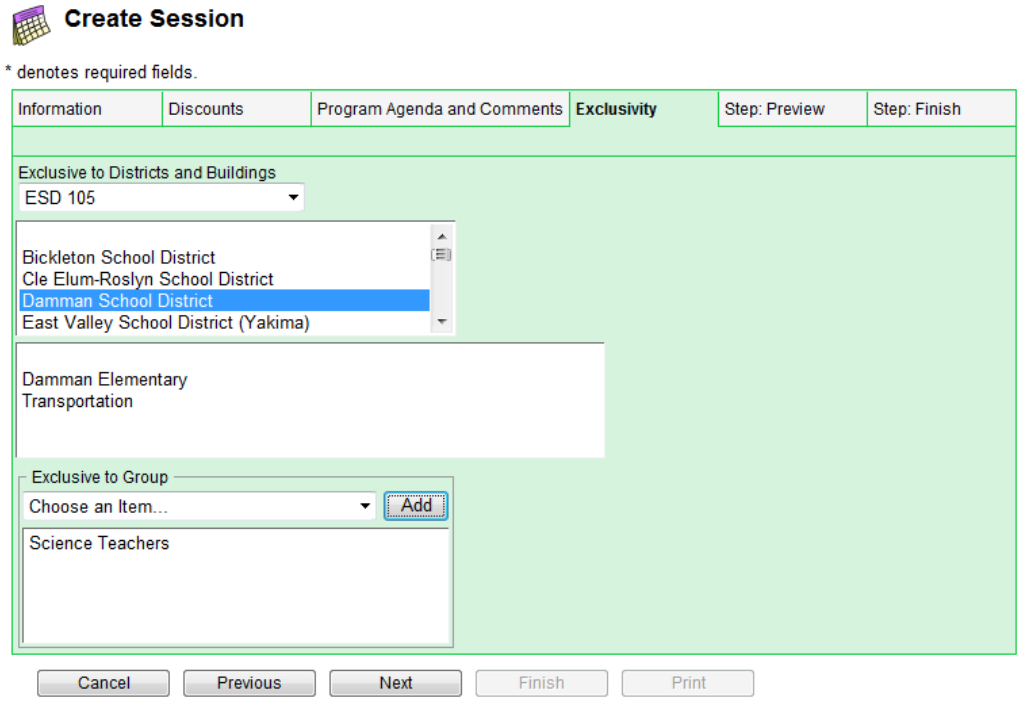
Comments for Internal Use:
Comments entered in this field will appear in the Resource Schedule report for the facilities manger.

Confirmation Comments:
Comments entered in this field will display on the confirmation page the participant receives when they register for the session. For Online Workshops this area may be used to display the Internet address of the class.

- Click the ***Next*** button to continue to the Exclusivity Screen.

Session Screen 4: Exclusivity

You may use *escWorks* to limit session registration. Enrollment may be restricted by the attendee's district, building, or by group membership.



The Exclusivity Screen ensures that only participants from the selected locations or groups may register for the session. If the session is open to all participants, click ***Next*** to move to the next screen.

Common Fields used on the Exclusivity Screen:

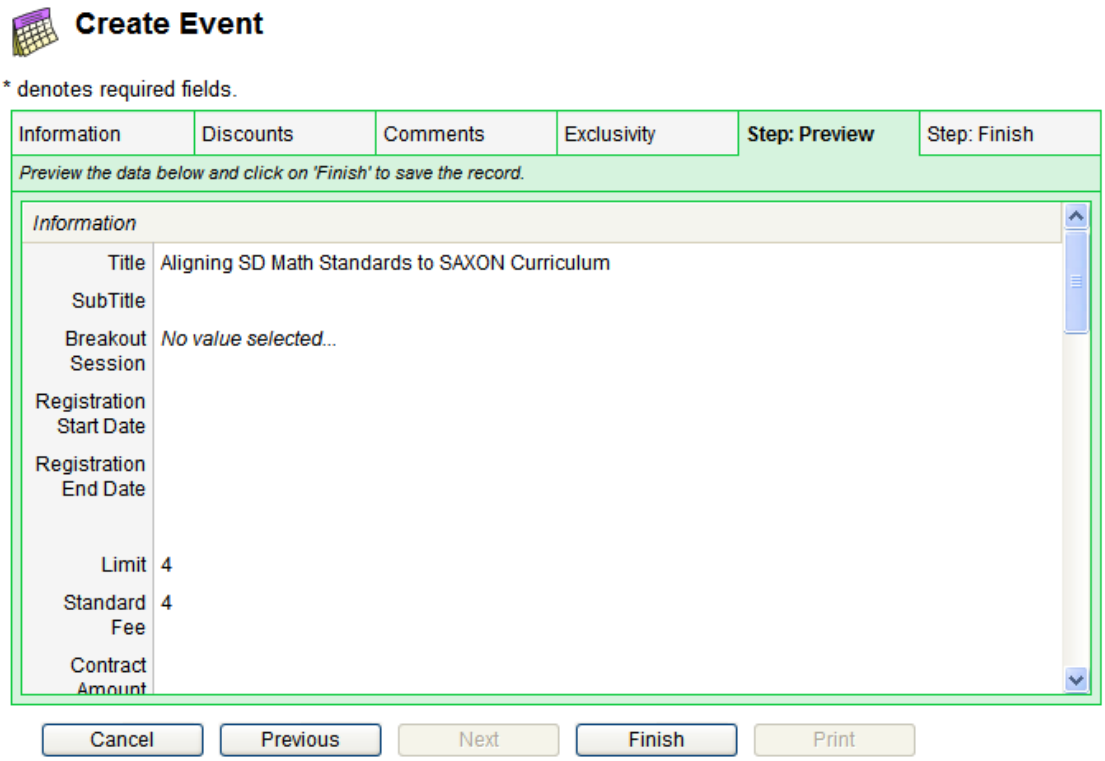
Exclusive to Districts and Buildings:
Select the Organization and District(s) that will be able to register for this workshop. You may limit enrollment to this workshop to members of a specific building by selecting the district and building(s) from the dropdown menu.

Exclusive to Group:
Select the group that the workshop is intended for. For example you may limit enrollment to this session to the attendees identified as part of the group Science Teachers.

- Click the ***Next*** button to move to the Preview screen.

Session Screen 5: Preview

The Preview Screen is used to review the data that was entered as the session was created.



Use the scroll bar on the right-hand side of the window to review the information that has been entered for this session.

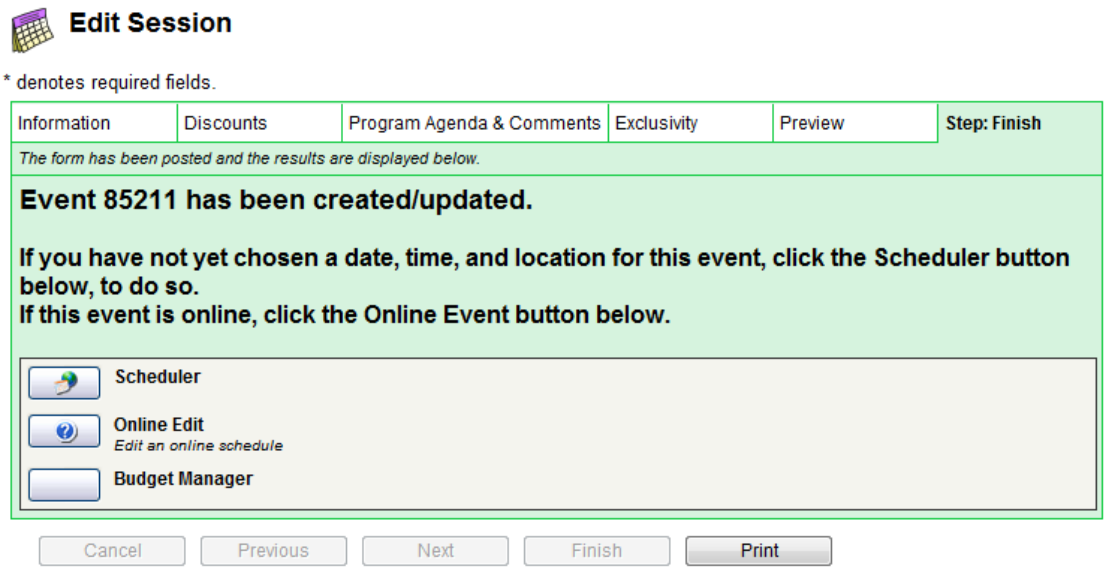
If necessary, use the ***Previous*** button to go back to the appropriate entry screen and make corrections. Once the corrections have been made, proceed through the screens by clicking the ***Next*** button.

Click the ***Cancel*** button to cancel the creation of this workshop.

Note: All data entry will be lost if the ***Cancel*** button is selected.

Click the ***Finish*** button to save this session.

The next screen confirms the workshop was created in *escWorks*. Make note of the Session ID for ease of locating the session in the future. Notice the screen now prompts for scheduling a room, setting up the schedule for an online session, or entering the session budget information.



Click the ***Scheduler*** button to set up the room reservation room for your workshop, click on the ***Online Edit*** button to enter the start and end dates if this workshop will be offered online, or click the ***Budget Manager*** button to enter the budget information for this session.

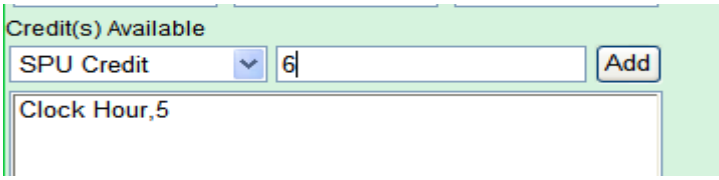
Click on the ***Print*** button to print a summary of the information that you entered while creating this session.

For instructions on scheduling a room for your workshop, continue to the next section. For instructions on setting up an Online Workshop, skip to the section titled *Setting up an Online Workshop*.

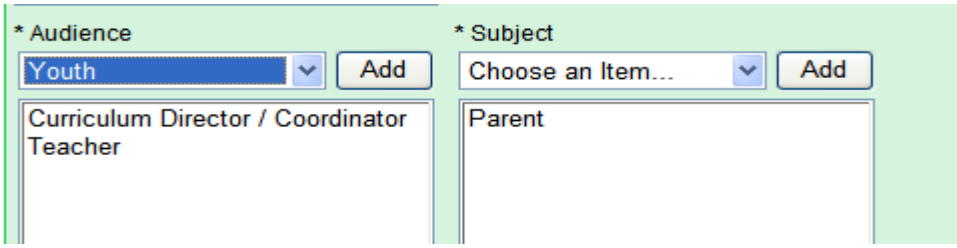
Tips for Entering Data in the Module Forms

- An asterisk (*) in front of a field indicates it is a required field and you will not be able to move to the next screen until information has been entered in the fields.

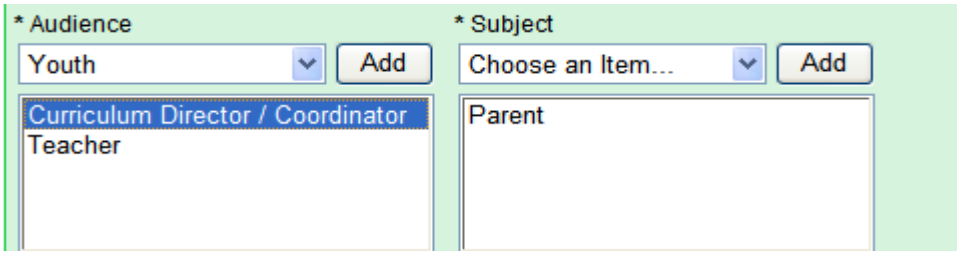
- *When a field has a dropdown menu and then a text field next to it, make the appropriate selection from the dropdown menu and then enter the text in the text field and click* **Add**. *The data will be displayed as below:*



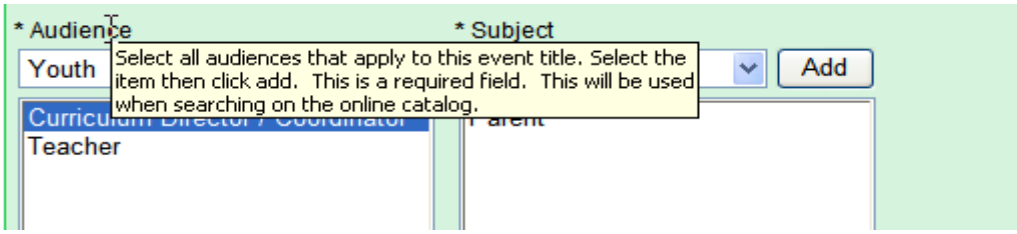
- If a dropdown menu has an ***Add*** button and a box underneath it, you may make multiple selections for that field. Make a selection from the dropdown menu and click ***Add*** until all of the appropriate selections have been made.



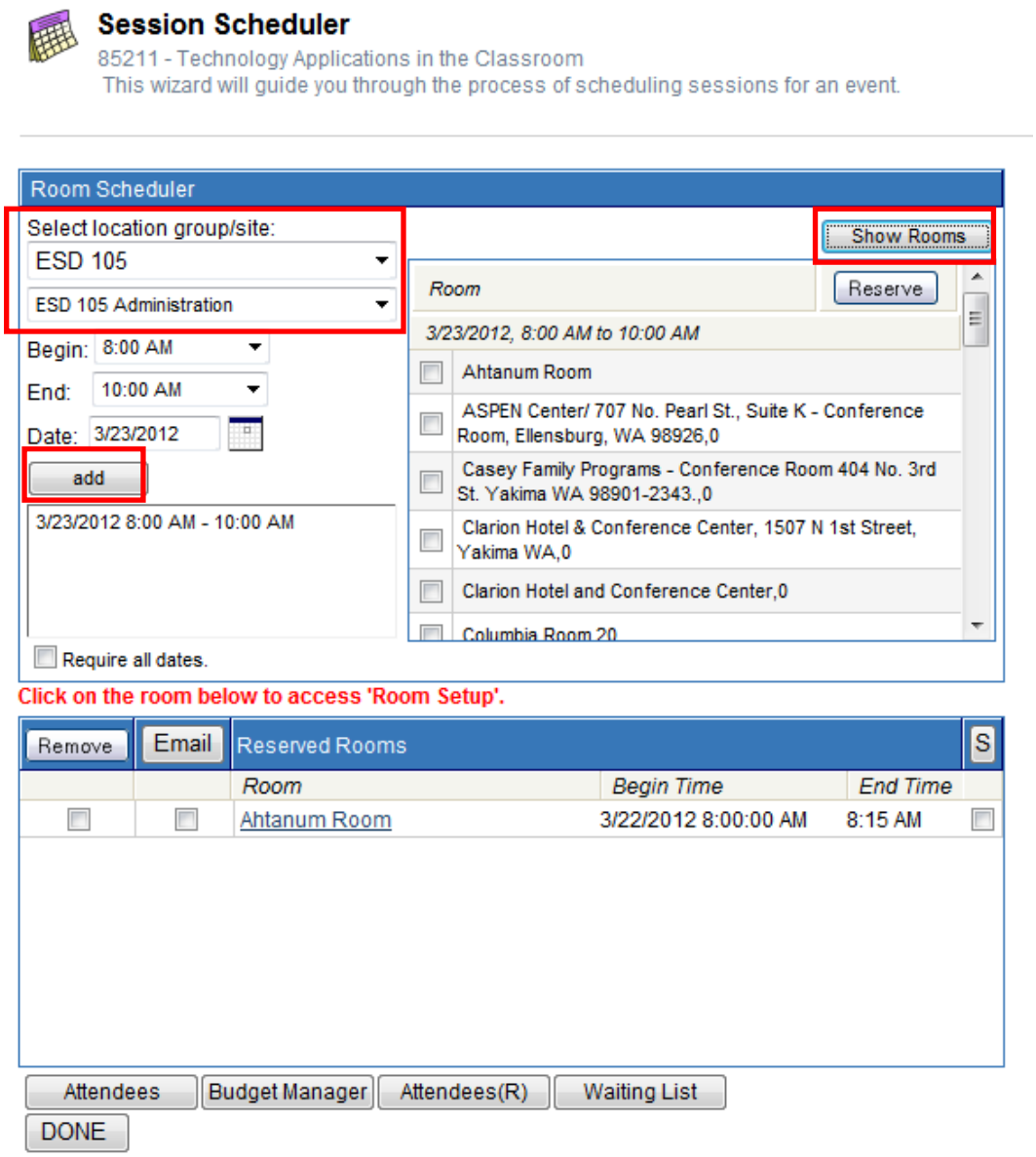
- *Double click on an entry to remove it from the screen.*



- Hover the cursor tip over the field title to view any additional instructions regarding that field (tool tips).



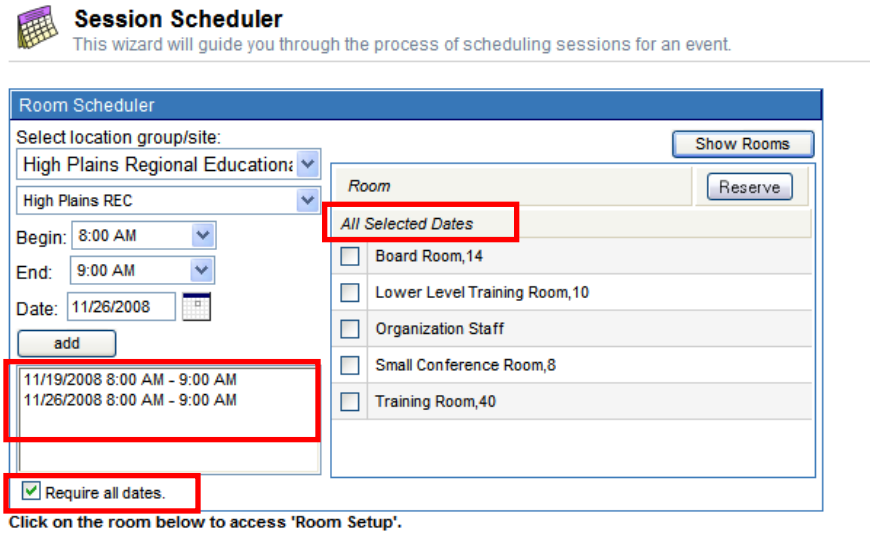
Scheduling a Room for Your Session



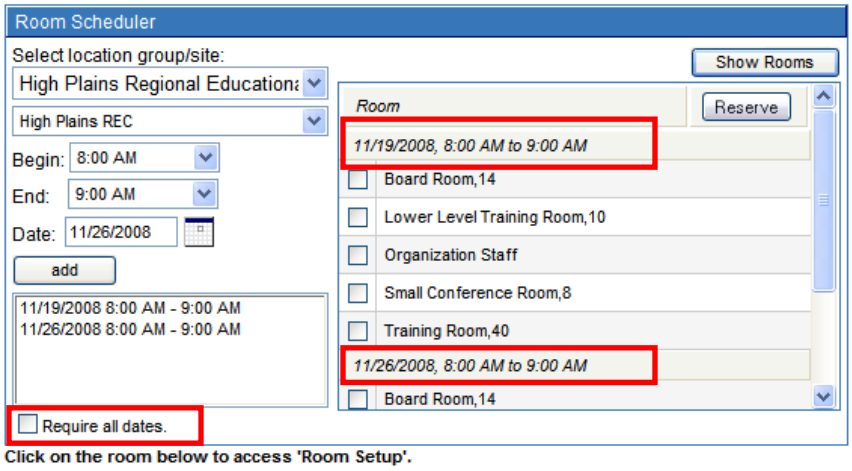
- Select the Location and Site where the workshop will be offered using the location dropdown menus.
- Enter the actual time the workshop will start using the **Begin** dropdown menu.
- Enter the time the workshop will end using the **End** dropdown menu.
- Enter the **Date** the room is to be reserved for this workshop.
- Click the ***Add*** button. (**Note**: The selected date and times are now displayed in the box below the add button).
- Repeat steps 1 – 4 for any other dates and times associated with this workshop.
- Click the ***Show Rooms*** button to view all the rooms available at the requested time.
- Select the desired room by clicking on the check box next to the room name.

- Click the ***Reserve*** button to reserve the room(s). Notice the room(s) is no longer listed under Reserve.
- If the workshop will be offered on multiple dates and times, and you would like to reserve the same room for each workshop, click the check box next to ***Require all dates***. If this box is checked, only the rooms available for ALL of the selected dates and times will show in the Room screen. If this box is not checked, the room screen will show the room availability for each date and time entered. Note the difference in the screen shots below:

Option 1: Require all dates



Option 2: Each date will be listed followed by the available rooms

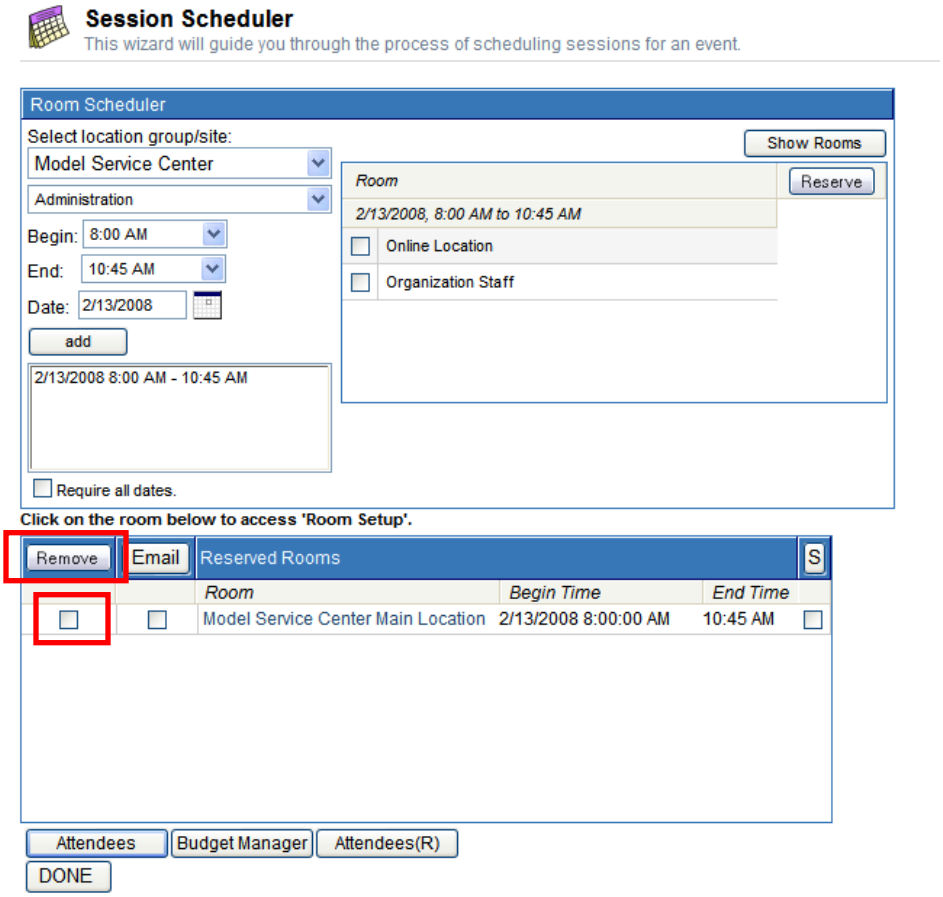


Note: If a room is not displayed when the show rooms button is selected, the room is unavailable.

Note: The number next to the room name is the room capacity.

Changing an Existing Room Reservation

To remove a previously selected room reservation, click in the box next to the room to be deleted and click the ***Remove*** button.



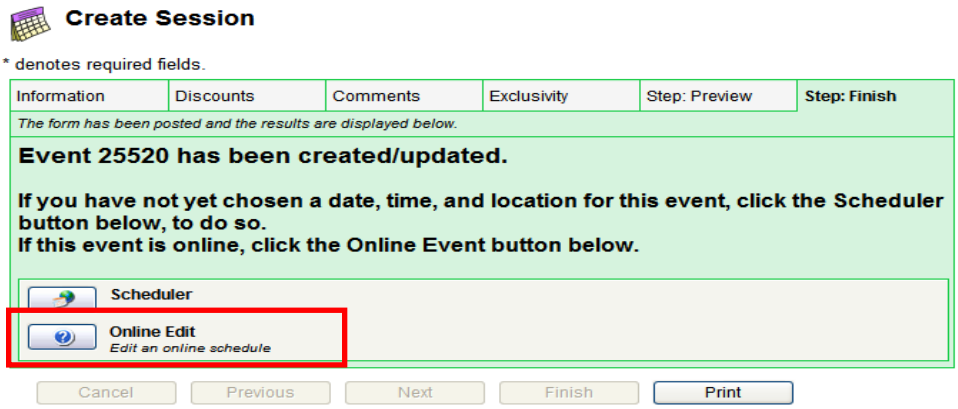
When changing a room reservation, it is a good practice is to add the new room first and then remove the old room.

Use the ***Email*** button on this screen to email your participants that the event location has been changed.

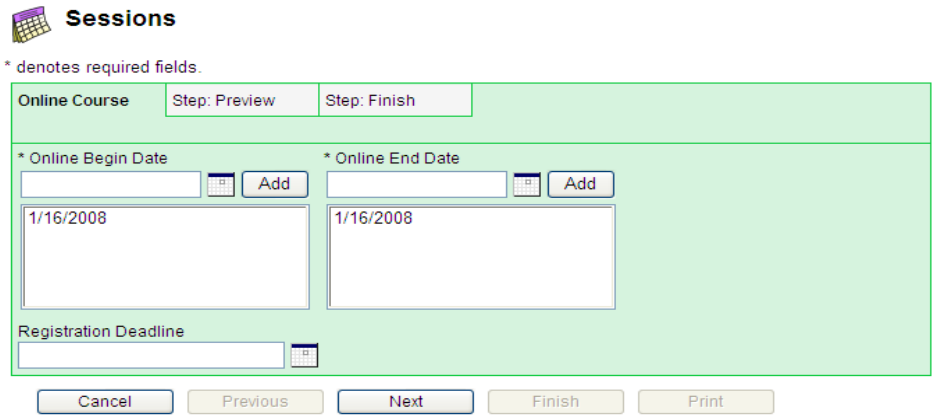
Note: The "S" with a selection box underneath indicates a Special Day. Use this feature to book an alternate day for the workshop. Check the box under the "***S***" to indicate this is an alternate\special date. If the first date of the workshop is cancelled, the Special Date will take place of the original date. If the first workshop date passes without being cancelled, the reservation under the Special Date will automatically be cancelled.

Setting up an Online Session

To identify the session you are creating as an Online Session, click the ***Online Edit*** button after you have entered all of the workshop information in the Create screens.



The ***Online Edit*** button will open the following screen:



Common Fields used on the Online Session Screen:

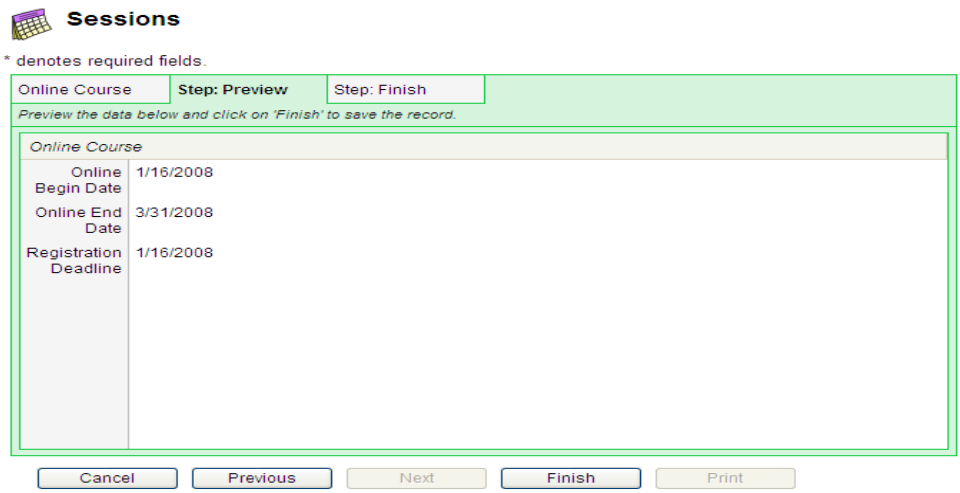
Online Begin Date
Enter the date the Online Session will begin and click ***Add***.

Online End Date
Enter the date the Online Session will end and click ***Add***.

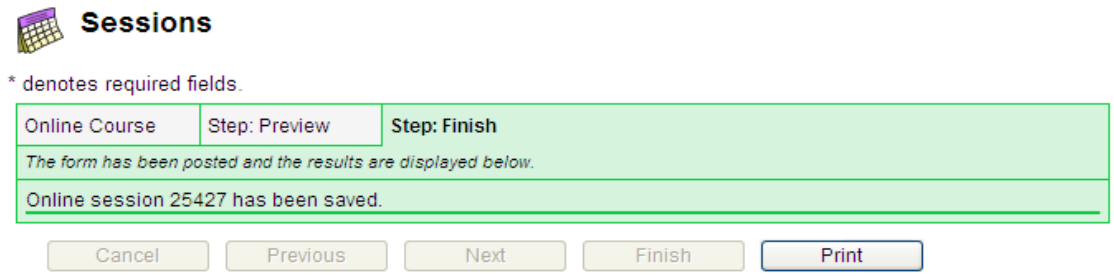
Registration Deadline
Enter the date by which participants must register for the session and click ***Add***.

- Click the ***Next*** Button to continue to the Preview screen

Screen 2 Online Session: Preview



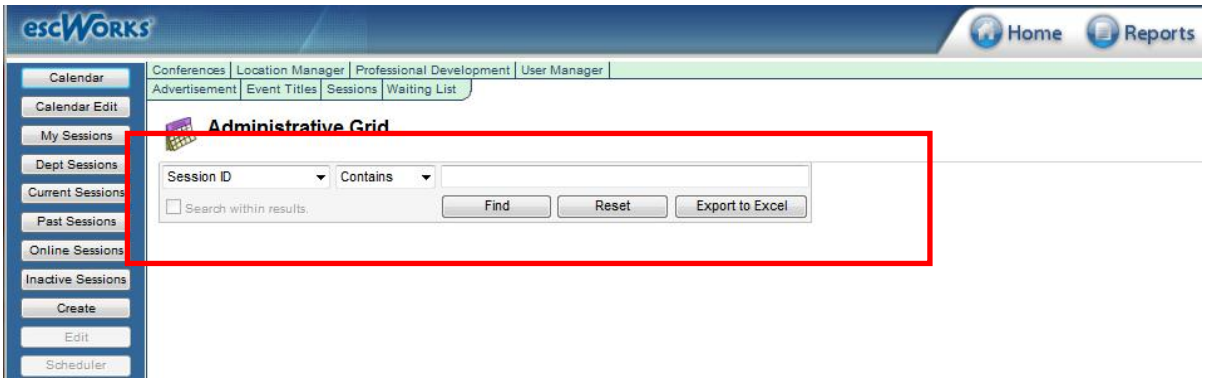
- Review the information that has been entered for this session
- If any items require correction, use the ***Previous*** button to go back to the appropriate entry screen and correct the information. Once the correction has been made, proceed through the screens normally by clicking the ***Next*** button.
- Click the ***Cancel*** button to cancel setting this workshop up as an Online Session
- Click the ***Finish*** button to save the Online Session information
- The next screen confirms the workshop was created as an Online Session in *escWorks*. Make note of the SessionID for ease of locating it in the future.



Note: The Online Event you created will be located using the ***Online Sessions*** button in the Sessions module.

Fining a Session: Using the Search Bar

Each module in *escWorks* uses a search bar similar to the one below. The search criteria in the dropdown menu varies from module to module, but the functionally is the same.



To use the Search Bar, select the appropriate search criteria from the dropdown menu in the search bar and enter the search details in the text entry field.

For example, if searching for a session by the ID number:

- Select ***Session ID*** from the dropdown menu
- Select ***Contains*** from the second dropdown menu
- Enter the Session ID in the text field
- Click ***Find***

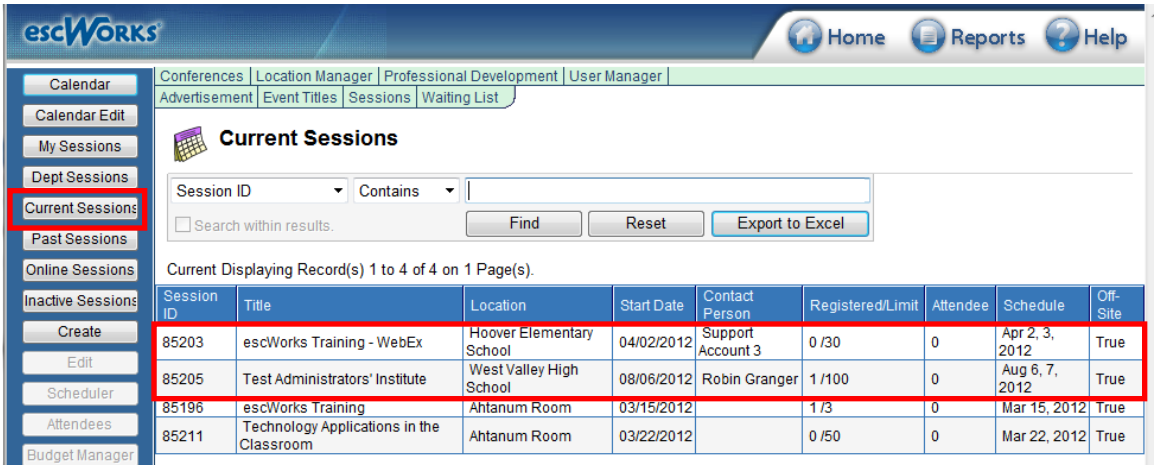
The search will display a maximum of 25 items per page.

If your search returns more than one page of results, you may use the Search within results option to refine your search. To use this option, click on the ***Search within results*** check box and then enter your new search criteria.

If you click find without entering any data, the search results will contain all of the data in the system for that module. For example, in the My Sessions module, clicking ***Find*** without entering any search criteria will display a list of all of the sessions that you have created.

Editing an Existing Session

Once a session has been created, it may be located by performing a search using the **Current Sessions** buttons in the Sessions module. You may search for the session using any of the search criteria options in the dropdown menu.



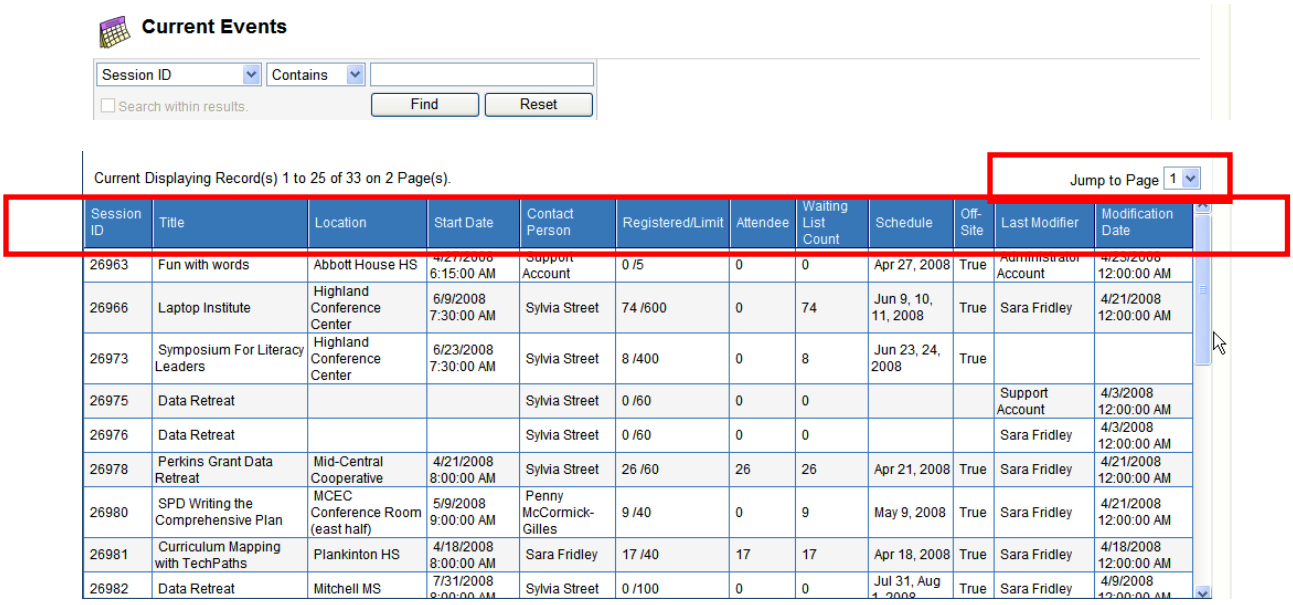
Once the Session is located:

- Click on the session to select it
- Click the ***Edit*** button in the control bar. This will open the Edit screens.
- Once the correction has been made, proceed through the remaining screens by clicking the ***Next*** button

Click the ***Finish*** button to save the changes

Viewing the Grids

The search results will be displayed in a grid under the search bar. The column titles in each module will vary depending on the data being displayed, but the grids will all function the same way.



Session ID	Title	Location	Start Date	Contact Person	Registered/Limit	Attendee	Waiting List Count	Schedule	Off-Site	Last Modifier	Modification Date
26963	Fun with words	Abbott House HS	4/27/2008 6:15:00 AM	Support Account	0 /5	0	0	Apr 27, 2008	True	Administrator Account	4/23/2008 12:00:00 AM
26966	Laptop Institute	Highland Conference Center	6/9/2008 7:30:00 AM	Sylvia Street	74 /600	0	74	Jun 9, 10, 11, 2008	True	Sara Fridley	4/21/2008 12:00:00 AM
26973	Symposium For Literacy Leaders	Highland Conference Center	6/23/2008 7:30:00 AM	Sylvia Street	8 /400	0	8	Jun 23, 24, 2008	True		
26975	Data Retreat			Sylvia Street	0 /60	0	0			Support Account	4/3/2008 12:00:00 AM
26976	Data Retreat			Sylvia Street	0 /60	0	0			Sara Fridley	4/3/2008 12:00:00 AM
26978	Perkins Grant Data Retreat	Mid-Central Cooperative	4/21/2008 8:00:00 AM	Sylvia Street	26 /60	26	26	Apr 21, 2008	True	Sara Fridley	4/21/2008 12:00:00 AM
26980	SPD Writing the Comprehensive Plan	MCEC Conference Room (east half)	5/9/2008 9:00:00 AM	Penny McCormick-Gilles	9 /40	0	9	May 9, 2008	True	Sara Fridley	4/21/2008 12:00:00 AM
26981	Curriculum Mapping with TechPaths	Plankinton HS	4/18/2008 8:00:00 AM	Sara Fridley	17 /40	17	17	Apr 18, 2008	True	Sara Fridley	4/18/2008 12:00:00 AM
26982	Data Retreat	Mitchell MS	7/31/2008 8:00:00 AM	Sylvia Street	0 /100	0	0	Jul 31, Aug 1, 2008	True	Sara Fridley	4/9/2008 12:00:00 AM

If more than one page of results is returned in the search, use the ***Jump to Page*** dropdown menu to move within the pages of the results.

The column titles in the blue bar at the top of each page of results may be used to sort the data. Click on a column title once to sort the data in ascending order. Click on the column title twice to display the data in descending order. Once the sort has been activated, you may click on the ***X*** in the column title bar to cancel the sort.

You may select more than one column title to sort the data. For example, you may click on the Contact Person column to sort the sessions by Contact Person and then click on Session ID to display the sessions by ascending ID number within the Contact Person grouping.