Professional Development Management Guide

Submitting a Proposal, Creating Sessions, Managing Attendees and Reports

For School Districts and Other External Partners

REVISED
July 27, 2012
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CREATING SESSIONS, AND MANAGING ATTENDEES
(for school districts and other external users)

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Submitting a Proposal

Customers must have a user account in order to create a Clock Hour proposal in the ESD 105 Professional Development system.

**NOTE:** If you have registered on the ESD 105 Professional Development system before April 9, 2012, you have an account. Click on the Sign In button below quick links on the upper left side of the screen. You will enter your last known e-mail address. In the password area enter the default password education and click the submit button. When the screen refreshes you will notice the Sign In button turns to Sign Out. Once you are in the system you can change the password to whatever you would like it to be through the “User Account” link.

If you have an existing account, you should go in and update your personal information using the “User Account” link.

Once an account has been created, ESD 105 will assign permissions to the account so that the CECH Proposal link will display once you have logged in.

**NOTE:** The CECH Proposal link will only display after you have logged into the system.
• Clicking on the CECH proposal link opens the CECH Proposal screen:

![CECH Proposal Screen](image)

The CECH Proposal Screen is used to create proposals and to monitor the status of proposals that have already been submitted.

**Creating a New Proposal**

A new proposal is a Clock Hour Proposal for a session that has not been entered in this system previously.

**To create a new proposal:**

- Log into the ESD 105 Professional Development System
- Click on the CECH Proposal link
- Click on the New Proposal Link in the CECH Proposal screen
The CECH Proposal creation forms will open:

**Note:** The tabs along the top of the screen may be used to indicate your current location in the process.
Course Description Tab

The Course Description tab is the first page of the CECH Proposal form.

**Note:** Fields marked with an asterisk are required fields. Also, where it asks for “My Organization” be sure to enter your school district from the drop down menu.

Common Fields used on the Course Description Tab:

**Title**
Enter the Event Title. This will be the title that is displayed in the Calendar of Events and on the attendees transcripts once they have been marked attended in the session.

**First Time Proposal \ Repeat Proposal**
Use the radio buttons to indicate if this is the first time this proposal has been submitted for approval. If Repeat Proposal is selected, enter the Session ID that was assigned to the original session.

**Person Completing Form**
Enter the name, contact number, and email address of the person completing the proposal form. This is the contact information that will be used if there are questions regarding the proposal.
Minimum Attendees
Enter the minimum number of attendees that should register for the session in order for the session to take place.

Maximum Attendees
Enter the maximum number of attendees that will be able to register for the session. Consider the size of the room where the session will be held when selecting this number.

Method of Delivery
Use the drop down menu to select the method of Delivery for this session. The option selected in this field determines how the system will display the session in the system. For example: sessions identified as On-Site will display in the Calendar of Sessions, Conference sessions will display in the Conference section of the system, On-line sessions will display in the Online Sessions area of the system.

Required Breakout Session (If Conference)
If the Method of Delivery is set to conference, you can select to make one breakout session within the conference mandatory for the participants to select. For example, if all users should attend the Keynote session at the beginning of the day, select Keynote as a required breakout.

Breakout Proposal (If Conference)
Every proposal will create one session for enrollment. The Breakout Proposal sets the breakout assignment for the session that will be created when the proposal is approved.

My Organization
Select which district this session will be hosting this session. The district selected in this field is used to indicate which district the session will be associated with. This is important for the calendar of events and for sorting the session data in the reporting feature. This selection will also determine which district approver the session will be sent to prior to being sent to ESD 105 for approval.

Begin, End, Date
Use these fields to indicate the dates and times that the session will be offered. Select the Begin time, the End time and the session Date, then click the Add button to add the selection to the date field. Multiple entries may be made if the session is a multi-day event.

Note: Double click on the entry to delete entries made in error.

Rooms
Enter the room that you would prefer that the session be offered in. The room reservation will be made after the proposal has been approved.
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.

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.

Registration 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.
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 will be charged the discounted price of $30.00.

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.

Revenue Allocation
Select the budget that the revenue for this session will be allocated to. Choose the appropriate budget from the drop down menu and then enter the percentage of the allocation that will be assigned to this budget. Multiple budgets may be assigned, but the allocations should equal 100% (i.e. budget 1248-000 for 50%, and budget 1249-000 for 50%).

Target Audience
Use the drop-down list and click Add Audience to select the target audiences for this session. Multiple audiences may be selected. Participants will use the Audience menu to search for sessions relevant to their interests.
NOTE: Below where it prompts for “Sponsoring District” be sure to state the proper location here, because this determines who reviews and approves the proposal.

Goals
Use the check boxes to identify which essential learning goals will be targeted in the session.

Clock Hours Requested
Enter the number of clock hours that are being requested for approval for this session.

Total Instruction Hours
Enter the total number of instruction hours that will be offered in this session. The total instruction hours excludes lunch and break time, and should match the number of clock hours that are being requested for approval for this session.

Sponsoring District
Use the drop down menu to select the district that will be hosting this session. It is very important that the correct location is selected here as this will determine who will review the proposal.

Impact for participant learning
Use the check boxes to identify the impact for participant learning as a result of attending the session.

Addressing Needs
Use the check boxes to identify the needs that this training will address. Multiple selections may be made.
Click the **Save and Continue** button to move to the next tab.

**Program Agenda Tab**
The program agenda tab is used to enter the Program Agenda Outline, Program Objectives, and Documented Need for the Session.

![Program Agenda Tab](image)

**Common Fields used on the Program Agenda and Comments Tab:**

**Documented Need:**
Identify the Documented Need that this session proposal will meet.

**Program Objectives:**
Discuss the Program Objectives for this session proposal.

**Program Outline and Schedule:**
Data entered in this field will be used to determine if the session meets the criteria to be approved for Clock Hours. The schedule and outline for the session will be entered in this area. The schedule of classroom hours must match the requested number of clock hours requested.
**Confirmation Comments:**
These comments will be included in the email that is set to participants upon registration.

Click the *Save and Continue* button to move to the next tab

**Program Description Tab**
The program description tab is used to invite other districts to register for the session, select appropriate subjects for the session and to add additional comments for the session.

![Program Description Tab](image)

<table>
<thead>
<tr>
<th>Program Description</th>
<th>Invite other districts to register:</th>
<th>ESD 105 ADMINISTRATION</th>
<th>Invite</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Double-click on the row to remove.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category/Program</td>
<td>* Select *</td>
<td>Add Subject</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Double-click on the row to remove.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration Deadline:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short Description of Intended Audience:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full Course Description:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-requisites:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>More Information:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**<< Return to Menu**  **Save Section**  **Save & Continue >>**
Common Fields used on the Program Description Tab:

**Invite other Districts to Register**
Use the drop down menu to select other districts that will be allowed to register for the session. If no other districts are selected, registration will be limited to the district that is hosting the event.

**Category\Program**
Select the categories and or programs which apply to this session. These selections will be used to search for sessions and to assist participants in selecting subscription topics.

**Registration Deadline**
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.

**Short Description of Intended Audience**
Enter a short description of the Intended audience for this session.

**Full Course Description**
Enter the full course description for the session. This description will display on the session detail screen, the search detail screen and the course catalog once the session has been approved.

**Pre-Requisites**
Enter the pre-requisites that will be required for the attendee to have completed in order to register for this session. The pre-requisites will display on the session detail page.

**More Information**
Use this field to enter additional information about the session that the attendees should be aware of. The information entered in this field will display on the session detail page and on the confirmation emails that the attendee receives when they register for the session.

Click the *Save and Continue* button to move to the next tab.
College Credit Proposal Tab
The college credit proposal tab is used for sessions that will be offered for college credit as well as, or instead of, clock hours. If the session will not be offered for college credit, you may skip this tab by clicking on the *Save and Continue* button.
Common Fields used on the College Credit Proposal Tab:

**Offer College Credit**
Check this box if the session will be offered for college credit.

**Credits Offered**
Enter the amount of college credit that the session will be offered for.

**Institution**
Enter the institution that will be offering the college credit hours for the course.

**Proposal Status**
Use the radio buttons to indicate if this is a first time proposal or if this proposal has previously been approved.

**Course Syllabus**
Enter the course syllabus\agenda for review.

**Accredited Teacher Information**
Enter the required information for the session instructor.

**Mailing Address**
Enter the mailing address where the clock hour packet should be mailed.

Click the *Save and Continue* button to move to the next tab.
Main Presenter Vita Tab

The main presenter tab is used to identify the session presenter (instructor). The session presenter will be listed on the session detail page and will have access to the session in the Instructor section of the customer website.

List Presenter\New Presenter

Use the radio buttons to identify if the presenter for this session is already has an account in the system. If the Presenter has an account, and they are marked as being a presenter in the system, their name will display in the Presenter drop down menu.

Presenter

Use the drop down menu to select the Primary Presenter for the session. If the desired presenter is not displayed in the list, select the New Presenter radio button to create an account for the presenter.

Additional Course Presenters

Use the drop down menu to select additional session presenters. Click the Add Presenter button to add the additional presenters. Multiple selections may be made.
Click the **Save and Continue** button to move to the next tab.

**Note:** If the session presenter does not have an account in the system, clicking the New Presenter option will open the screens to create a new Presenter account and to enter the Presenter’s Vita.

The following images display the new presenter account creation screen:

![Main Presenter Vita Form](image)

<table>
<thead>
<tr>
<th><strong>Field</strong></th>
<th><strong>Value</strong></th>
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</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
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<td>City</td>
<td></td>
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<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Zip</td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Birthdate</td>
<td>3/20/2012</td>
</tr>
<tr>
<td>Current Employer/District</td>
<td></td>
</tr>
<tr>
<td>Work Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Zip</td>
<td></td>
</tr>
<tr>
<td>Work Phone</td>
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## Educational Background:

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<th>Degree(s):</th>
<th>Awarding Institution:</th>
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</tbody>
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- On file within last 12 months

## Professional Experience and Activities:

(Indicate academic and/or professional experience which specifically qualifies you to conduct the in-service education program.)

## Professional Memberships:

- On file within last 12 months

## Objective(s):

- On file within last 12 months

## Qualification(s):

- On file within last 12 months

## Personal References:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Information:</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

- On file within last 12 months
Submission Tab

The submission tab is used to submit your Proposal for approval.

Click on the *Submit CECH Proposal* button to submit your proposal for approval.

**Note:** The proposal is considered final once the proposal has been submitted for approval. Any edits or revisions made to the proposal after it has been submitted are considered to be a new Clock Hour Proposal.
Clock Hour Proposal Approval Process for District Proposals

This flow chart represents the clock hour approval process for district proposals.

Any proposal that is denied will be sent back to the submitter. After the proposal is re-submitted, the approval process will begin again.

The Clock Hour Number is emailed to submitter and Clock Hour Registrar after scheduling.
Proposal Status

Once your proposal has been submitted for approval, you may track the status of your proposal in the CECH Proposal link in the system.

To view the status of your proposal

- Log into the ESD 105 System
- Click on the CECH Proposal link
- View the proposal status in your Proposal Form grid
Room Reservations for Approved Proposals

(Important)

Once you receive the email letting you know that your proposal has been approved, you will need to book your room reservation for the session

To book your room reservation:

- Log into the ESD 105 System
- Click on the CECH Proposal Setup link in the main menu bar
- Click on Setup next to the proposal you are ready to book the room for

- The room selection screen will open
• Use the drop down menu to select the district where you want to reserve the room
• The room available for reservation will display in the scheduler window.
  **Note:** For your reference, the system will display the room you requested when you submitted the proposal.
• The system will display the date and time of your session.
• Check the box next to the room(S) to be reserved
• Click the **Process** button to complete the reservation

• The Event generator window will open
• The system will create the Session ID for your session and reserve the select rooms
• Your session has now been created. Make note of the Session ID for future reference
• Click Close to close the window or Print to print the session details
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 or Editing Original Proposal

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](http://www.escworks.net) into an Internet browser. **Note:** The best browser to use in navigating this site is “Internet Explorer.”

NOTE: This is the same as the registration/proposal site email address and password.

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.
**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

Create Session

* denotes required fields.

<table>
<thead>
<tr>
<th>Information</th>
<th>Discounts</th>
<th>Program Agenda and Comments</th>
<th>Exclusivity</th>
<th>Step: Preview</th>
<th>Step: Finish</th>
</tr>
</thead>
</table>

- **Title**
  - Choose an item...

- **SubTitle**
  - Registration Start Date
  - Registration End Date
  - Credit(s) Available
  - * Limit
  - * Standard Fee

- **Primary Instructor**
  - Choose an Item...

- **Contact Person**
  - Choose an Item...

- **Additional Instructors**
  - Choose an Item...

- **Evaluation**
  - Clock Hour Evaluation
  - Do Not Email Online Evaluation
  - Do Not Print In Catalog
  - Do Not Display Online
  - Email Contact Session Registrations

[Buttons: Cancel, Previous, Next, Finish, Print]
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 into the system via the Evaluation Manager. **NOTE:** If this is done, participants can’t purchase clock hours.

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. **NOTE:** Participants can still find sessions if they know the session ID number.

Session Screen 2: Discounts

**Early Reg. Date:**
Enter the date that the participant must register for the workshop. For example, if you enter 3/14/2008 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 manager.

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. Caution: Participants accounts must be up-to-date and current for this to work well.

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.
• **For ESD 105 Only:** 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.

![Dropdown menu example](image1)

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

![Dropdown menu example](image2)

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

![Dropdown menu example with tool tips](image3)
Scheduling a Room for Your Session

- Select the Location (for Districts it will always be ESD 105)
- 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**

---

Click on the room below to access 'Room Setup'.
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 eseWorks. Make note of the Session ID for ease of locating it in the future.
### Sessions

* denotes required fields.

<table>
<thead>
<tr>
<th>Online Course</th>
<th>Step: Preview</th>
<th>Step: Finish</th>
</tr>
</thead>
</table>

The form has been posted and the results are displayed below.

Online session 25427 has been saved.

---

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

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.
Waiting List (Instructor’s process)

Once a workshop has reached the registration limit, participants may place themselves on the Waiting List for that workshop in the registration section of the system. If space becomes available in the workshop, then they will be notified of the availability via email. If they do not register for the workshop within 3 hours of the email being sent, the next person on that workshop’s Waiting List will be notified that space is available and this attendee will be moved to the end of the waiting list order.

The system checks for participants on the Waiting List and openings in the sessions several times a day and sends the notification emails throughout the day.

The Waiting List Module is used to view those participants who are currently on the waiting list.

To view the current Waiting List:
- Click Professional Development in the menu bar
- Click Waiting List from the sub-menu
- Select the search Criteria from the dropdown menu (Name, Workshop ID, etc.)
- Click Find

The Waiting list grid displays the name of the person on the Waiting List, the ID number, Title and Date of the workshop that they are Wait Listed for, the time that they went on the Wait List, and if applicable, the time that they were notified that space became available in the workshop.
The Waiting for each session may be managed in the Sessions Module.

To Manage the Waiting List for a Session:

- Click Professional Development in the menu bar
- Click Sessions from the sub-menu
- Locate the session in the Current Sessions grid and click on it
- Click on the Waiting List button in the control bar
- The Waiting List Manager will open:

85211 - Technology Applications in the Classroom

<table>
<thead>
<tr>
<th></th>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Date Added</th>
<th>Notified Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sharon</td>
<td>Mainka</td>
<td><a href="mailto:sharon@mainkas.com">sharon@mainkas.com</a></td>
<td>3/11/2012 5:47:00 PM</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Support</td>
<td>Account</td>
<td><a href="mailto:smainka@swbell.net">smainka@swbell.net</a></td>
<td>3/11/2012 5:56:55 PM</td>
<td></td>
</tr>
</tbody>
</table>

The Waiting List Manager may be used to manage the waiting list for any session.

- Use the arrows next to each attendees name to adjust that attendee’s position in the waiting list
- Use the next to each attendees name to remove an attendee from the waiting list
- Use the feature to add new attendees to the waiting list. Type the attendee’s name in the text field and then click on the plus sign to add them to the waiting list
- The Waiting List History for each session will display the name of the attendees who were on the waiting list, when they were notified when space became available in the session, and what action they took when they were notified about the space availability.

<table>
<thead>
<tr>
<th></th>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Notified Date</th>
<th>Action</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Support</td>
<td>Account</td>
<td><a href="mailto:helpdesk@esd.net">helpdesk@esd.net</a></td>
<td>3/11/2012 6:42:00 PM</td>
<td>Rejected</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Sharon</td>
<td>Mainka</td>
<td><a href="mailto:sharon@mainkas.com">sharon@mainkas.com</a></td>
<td>3/12/2012 6:13:00 AM</td>
<td>Expired</td>
<td>3/12/2012 9:13:00 AM</td>
</tr>
<tr>
<td>3</td>
<td>Sharon</td>
<td>Mainka</td>
<td><a href="mailto:sharon@mainkas.com">sharon@mainkas.com</a></td>
<td>3/12/2012 9:13:00 AM</td>
<td>Rejected</td>
<td>3/12/2012 11:22:00 AM</td>
</tr>
</tbody>
</table>
Attendee Management of Session Wait List Options (Attendees response):

If space becomes available in a session, the first attendee on the Waiting List will be notified via email that space is available in the session.

Note: The waiting list notification emails are not sent between the hours of 8 pm and 6 am. If space becomes available in a session during this time period, emails will be sent out after 6 am.

The email will prompt the attendee to either register for the session or select to be removed from the waiting list.

- If the Attendee wishes to register for the session, they will be redirected to the session registration page to complete the registration:

![Registration Cart](image)

- If the Attendee requests to be removed from the waiting list for the session, the next attendee in the waiting list for that session will be notified of the space availability.

- If the Attendee does not respond to the Waiting list email within the 3 hour limit, the next person on the waiting list will be notified that space is available in the session and the attendee will be moved to the end of the waiting list order.
The Attendee may monitor their Waiting List selections at any time in the Waiting List screen in the Registration History section of the Customer Website

**To Access the Waiting List Screen:**

- Log into the customer website
- Click on the *Registration History* link
- Click on the radio button next to *Waiting List*
- Review the sessions for which you are currently on the Waiting List
- If appropriate, click the *Remove from Waiting List* link to be removed from the Waiting List for any session
Instructor’s Link

The Instructor Link will display for those accounts identified as an Instructor in escWorks.

The Instructor Link allows for Instructors to access information about their workshops. The Instructor area contains sign in sheets, the ability to email workshop participants, and workshops enrollment numbers.

Instructor Sign-in Sheets

- Print a sign in sheet by clicking the sign in sheet icon for the event
- Select to either open or save the pdf file
- Select File and Print to print the sign in sheet
<table>
<thead>
<tr>
<th>Sign In (Full Name)</th>
<th>Name</th>
<th>District - Campus</th>
<th>Position</th>
<th>Payment Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapman, Angie</td>
<td></td>
<td>MONTGOMERY SD - STEWART CREEK BHM</td>
<td>Teacher</td>
<td>PO</td>
</tr>
<tr>
<td>Kenworthy, Dana</td>
<td></td>
<td>MONTGOMERY CO - MONTGOMERY INTER</td>
<td>PTP/Adj. PTP</td>
<td>PD 24W0</td>
</tr>
</tbody>
</table>
Instructor Email

- Email the participants by clicking on the email Manager icon for the event
- The following window will open:

```
Instructor Email Manager

Instructor Sessions: 44021 - esc03k32x Current

Recipients List

All Users

Mail: Ash <amoll@esclive.net>
Reyes, Camilla <creyna@esclive.net>
Tipton, Sherry <stipton@esclive.net>
Wilkerson, Jennifer <jwilkerson@esclive.net>
Williamson, Vicki <vwilliamson@esclive.net>

(Read <Add> for multiple selections.)

Recipient(s): There is no recipient.

Subject:

Comments:

Send Cancel
```

- Enter a subject line
- Enter comments
- Click Send

**Note:** The email will be sent to the participants from messenger@esclive.net and may be blocked by the participants email manager. Therefore, an alternative option would be to copy and paste the email addresses into your email system. This way the email comes directly from the Instructor and attachments can easily be added.
Waiting List

Once a workshop has reached the registration limit, participants may place themselves on the Waiting List for that workshop in the registration section of the system. If space becomes available in the workshop, then they will be notified of the availability via email. If they do not register for the workshop within 3 hours of the email being sent, the next person on that workshop’s Waiting List will be notified that space is available and this attendee will be moved to the end of the waiting list order.

The system checks for participants on the Waiting List and openings in the sessions several times a day and sends the notification emails throughout the day.

The Waiting List Module is used to view those participants who are currently on the waiting list.

To view the current Waiting List:

- Click Professional Development in the menu bar
- Click Waiting List from the sub-menu
- Select the search Criteria from the dropdown menu (Name, Workshop ID, etc.)
- Click Find
The Waiting list grid displays the name of the person on the Waiting List, the ID number, Title and Date of the workshop that they are Wait Listed for, the time that they went on the Wait List, and if applicable, the time that they were notified that space became available in the workshop.

The Waiting for each session may be managed in the Sessions Module.

**To Manage the Waiting List for a Session**

- Click Professional Development in the menu bar
- Click *Sessions* from the sub-menu
- Locate the session in the Current Sessions grid and click on it
- Click on the *Waiting List* button in the control bar
- The Waiting List Manager will open:

![Waiting List Manager](image)

The Waiting List Manager may be used to manage the waiting list for any session.

- Use the ▲ ▼ arrows next to each attendees name to adjust that attendee’s position in the waiting list
- Use the ❌ next to each attendees name to remove an attendee from the waiting list
• Use the Add New: [Support Account] feature to add new attendees to the waiting list. Type the attendee’s name in the text field and then click on the plus sign to add them to the waiting list.

• The Waiting List History for each session will display the name of the attendees who were on the waiting list, when they were notified when space became available in the session, and what action they took when they were notified about the space availability.

### History

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
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</tr>
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Attendee’s Management of Session Wait List Options:

If space becomes available in a session, the first attendee on the Waiting List will be notified via email that space is available in the session.

Note: The waiting list notification emails are not sent between the hours of 8 pm and 6 am. If space becomes available in a session during this time period, emails will be sent out after 6 am.

The email will prompt the attendee to either register for the session or select to be removed from the waiting list.

- If the Attendee wishes to register for the session, they will be redirected to the session registration page to complete the registration:
• If the Attendee requests to be removed from the waiting list for the session, the next attendee in the waiting list for that session will be notified of the space availability.

• If the Attendee does not respond to the Waiting list email within the 3 hour limit, the next person on the waiting list will be notified that space is available in the session and the attendee will be moved to the end of the waiting list order.
The Attendee may monitor their Waiting List selections at any time in the Waiting List screen in the Registration History section of the Customer Website

**To Access the Waiting List Screen:**
- Log into the customer website
- Click on the Registration History link
- Click on the radio button next to Waiting List
- Review the sessions for which you are currently on the Waiting List
- If appropriate, click the Remove from Waiting List link to be removed from the Waiting List for any session

![Registration History Screen](image-url)
Managing Session Attendees

There are two versions of the Attendees screen in the system. The Attendees and the Attendees (R) buttons are also available from the Room Reservation screens.

The Attendees button will be used by the system users who have been assigned permissions to enroll participants in workshops.

The functions available in this Screen:

- View the participants currently enrolled in the session
- Click on the Enroll button to enroll additional participants in the session
- Click on the Multi Enroll button to enroll groups of participants in the session
- Click on the Email button to open an email message that is addressed to all of the registered participants
- Mark participants as having attended the session

Click on the participants’ name to view the payments they have made for the session or to add/edit payments.

Click on the Cancelled Attendees button to display a list of the participants who have cancelled out of the session.
Attendees (R) Screen

The Attendees (R) button will open a Read-Only version of the Attendees screen.

The functions available in this Screen:

- View the participants currently enrolled in the session
- Click on the Email button to open an email message that is addressed to all of the registered participants
  - See if a participant was marked attended
  - Click on the participant name to open a copy of the confirmation that the participant received when they registered for the session
- Click on the Cancelled Attendees button to display a list of the participants that cancelled out of the session

Below is the example of the Read-Only version of this screen.

- Click Close to close this screen.

Note: See the Enrolling Participants section of this manual for instructions on taking attendance and enrolling participants in sessions.
Attendees Screen

The Attendees button will be used by the system users who have been assigned permissions to manage participants in the sessions. This screen is where you will manage all of the Attendee data for the sessions.

The functions available in this screen:

- View the participants currently enrolled in the session
- Click on the Enroll button to enroll additional participants
- Click on the Multi Enroll button to enroll groups of participants
- Click on the Email button to send an email message to all of the registered participants
- Click on the Attendee’s email address to email individual attendees
- Click the Attended box to mark participants as attended in the session
- Click on the participants’ name to open the Attendee Manager screen
- Click on the Cancelled Attendees button to display a list of the participants that have cancelled out of the session
- Click on the Multi-Credit link to override the amount of credits the attendee should receive for the session
Enrolling a Participant in a Session

The Attendees screen shown above is used to manage session enrollment.

To view the participants currently enrolled in a Session:
- Locate and select the sessions in the appropriate grid (e.g. My Sessions)
- Click on the Attendees button in the control bar

To enroll a participant in a Session:
- Locate and select the session in the appropriate grid (e.g. My Sessions)
- Click on the Attendees button in the control bar
- Click on the Enroll button to open the following window:

- Use the Search by dropdown menu to select the search criteria to be used
- Enter the search text in the Search for text box (e.g. Participant name)
- Click the Find button
- Select the participant that you would like to register by clicking on the radio button next to their name
- Click Save to enroll the participant in the session
- The individual is now registered for the session and Attendee Manager Window will open
- Click Close to close the window, or use the Attendee Manager to add another person to this session or to enter payments for the current participant
Attendee Manager

The Attendee Manager screen is used to manage all of the selected participant’s data for the session. This screen will automatically open after the participant has been enrolled in a session. You may also access this window by clicking on the participant’s name in the Attendees Window.

Attendee Manager Selected Participant:
This section of this screen displays the participant’s Name, Email Address and School so that you may verify that you have selected the correct participant.

Attendee Manager Selected Workshop:
This section of the screen displays all of the session information, including the Session ID, Title, Date and the Fees associated with this session. The Session Fee field displays the regular fee for the session.
Attendee Manager Options:

The Options section of the Attendee manager displays the additional functions that are available from the Attendee Manager.

**The functions available from this screen are:**
- Add another attendee to this session
- Add this attendee to another session
- Remove this attendee from this session
- Print the confirmation page the attendee received for this session
- View/edit the participant’s contact information
- Choose accommodations
- Transfer this attendee to another session
- Email the confirmation page to the attendee

Attendee Manager Registration History:

This section of the Attendee Manager screen displays the last 10 sessions this participant registered for. If you click on a session name in this area, the Attendee Manager will display the information for that session.

Attendee Manager Payments:

You may use the Payments section of the Attendee Manager screen to view or adjust payments that have already been made or to add payments to this session.

<table>
<thead>
<tr>
<th>Payment(s)</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Date</td>
<td>Amount</td>
<td>Status</td>
</tr>
<tr>
<td>Cash</td>
<td>2/20/2008</td>
<td>$1.00</td>
<td>Received</td>
</tr>
<tr>
<td>Add a new payment</td>
<td>Total Received</td>
<td>$1.00</td>
<td></td>
</tr>
</tbody>
</table>
**Note:** Review the Applying Payments section of this manual for detailed instructions on making and revising payments.

Once you have made all of the necessary revisions to the Attendee Manager screen, click the *Close* button to save your changes and return to the Attendee screen.
Enrolling Multiple Participants in a Session

escWorks’ Multi Enroll feature is used to enroll a group of attendees in the same session.

To enroll a group of participants in a Session:
- Locate and select the workshop in the Current Session Grid
- Click on the Attendees button in the control bar
- Click on the Multi Enroll button in the Attendees screen

The Multi Enroll button will open the following screen:
• Use the Search by dropdown menu to select the search criteria to be used
• Enter the search text in the Search for text box (e.g. Session ID)
• Click the Find button
• Select the participants to register by clicking on the check box next to their name
• Click Multi Enroll to enroll the selected participants in the session
• The selected participants’ names should now display in the Selected Participant section of the screen
• If no payments are being applied to the session, or if the participants are using separate payment methods, click the Close button and the selected participants will now be registered in the session

Tips for using the Multi Enroll feature:
• If a group of participants from one session are all attending another session, use the Session ID search criteria to Multi Enroll them in the second session.
  o Search by Session ID
  o Enter the ID number of the previous session they attended
  o Click Find
  o Select all of the participants
  o Click Multi Enroll
• To select the entire list of names in the search results, click on the check box next to Name in the title bar.

If all of the Multi Enroll participants are paying with one payment method (e.g. all attendees paying with one purchase order), use the payment section of this screen to apply the payment before closing the screen.
To apply a payment to a group of participants in a session:

- Follow the directions above to select the participants
- When the participants names are displaying in the Selected Participant section of the screen, use the Payment dropdown menu to select the payment type
- Enter the payment details
- Click **Save** to apply the payment to the participants
- Click **Close** to close the window

The payment information will be distributed to each participant. In example above, the workshop fee is $200.00. The total amount of the purchase order will be $400.00, but a $200.00 payment with the purchase order number 78954 will display in the Attendee Manager for each of these participants.

If the selected participants are not using the same payment method, they may be enrolled using the Multi Enroll feature, but their payments will need to be entered individually in the Attendee Manager.

**Note:** Review the Applying Payments section of this manual for detailed instructions on making and revising payments.
Removing Participants from a Session

To remove participants from a session:

- Locate and select the workshop in the Current Session Grid
- Click on the Attendees button in the control bar
- Click on the X next to the attendee’s name to remove them from the session
- The attendee is moved to the Cancelled Attendees

**Note:** Before removing an attendee from a session, make sure to refund any payments that have been posted to their account for this session.

To view the Cancelled Attendees:

- Locate and select the session in the Event Grid
- Click on the Attendees button in the control bar
- Click on the Cancelled Attendees Button

To re-register a Cancelled Attendee:

- Locate and select the session in the Current Session Grid
- Click on the Attendees button in the control bar
- Click on the Cancelled Attendees Button
- Click on the X next to the attendee name to re-register them in the session

**Note:** You will have to re-register an attendee in the session before making any adjustments to their payments.
Posting Attendance for a Session

Participants are not given credit for a session, (the session will not appear on their transcript) until attendance for the session has been posted.

To mark participants as Attended:

- Locate and select the session in the Past Sessions Grid
- Click on the Attendees button in the control bar
- Check the Attended Box under the participant’s name
- Click the Update button to save the changes
- Click Close to close the window

Marking a participant as attended also signals the system to send out the email notification for the electronic evaluation (if an electronic evaluation was selected for this session).
Posting Credits for a Session

If credits were assigned during the session creation, the participants will receive those credit hours once they have been marked *Attended* in the Attendee screen and have completed the Online Evaluation.

The Multi Credit feature is used to adjust the number of credits individual participants are eligible to receive for the session. For example, if a workshop is 6 hours long, but a participant leaves early and is not eligible to receive all 6 credit hours, their available credit hours may be adjusted using the Multi Credit feature.

To over-ride the credit hours a participant receives for attending the session:

- Locate and select the session in the Past Sessions Grid
- Click on the *Attendees* button in the control bar
- Click on the *Multi Credit* link in the Attendee screen
- Enter the adjusted number of hours in the applicable Credit field.
- Click *Save*
- The adjusted Credit hours will be applied to the participant’s record
Reports

Select the Reports icon to open the Report manager.

The reports are organized in folders. For example, to run a Sign In Sheet report, Expand the Attendees Reports Folder. Select Sign In Sheet.
- Enter the parameters necessary to retrieve the desired report. For example: Enter the Session ID to run the Sign In Sheet for a specific session
- Click *Proceed*

![Image of Choose a delivery method]

- Choose a delivery method or send the report to yourself via email
- Click *Get Report*

![Image of File Download]

- Click *Open* to view the report or click *Save* to save the report on your computer
To print the report select **Print** from the File menu
District Dashboard

The District Dashboard was designed to provide you with a personalized overview of your district’s activities at the Region 2 Education Service Center.

To Log into the District Dashboard

- Go to the ESD 105 website at: http://www.escweb.net/wa_esd105
- Click on the Sign in button
- Enter your email address in the Email Address field and your password in the Password field
- Click on the Submit button to log in to the system
- Select the District Dashboard link located on the left hand side of the screen
Viewing your Dashboard

The Home Page of the Dashboard is divided into several sections:

Professional Development Today
This section contains data which represents your District’s daily participation in ESD 105 events. Click on the link underneath the chart to view more detailed information.

Washington School District News
Displays current news article pertaining to Washington State educational news. Click on a link in this section to read the full article.

Superintendent’s Involvement –
Provides a list of all upcoming ESD 105 events for which you are registered.

District Search
Use the drop down menu in the District Search feature to display the contact information for any district located within ESD105.

Search
Select the Search tab to search for a listing of involvement in ESD105 activities by campus, by date range, or by participant.
Professional Development
Select the Professional Development link to view graphs which display the historical Registration and Attendance data for your District.

District Registration
The District Registration graph displays the number of registrations your district has had at ESD 105 events for the past 12 months. The registrations are sorted by campus type (Elementary, Secondary, Administration).

District Attendance
The District Attendance graph displays the number of participants from your district that have attended an event at ESD 105 in the past 12 months. The attendance is sorted by campus type (Elementary, Secondary, Administration).