

Using Squadron 5999 “NoneSuch” for HQ800

Seminar Training

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Introduction

First of all some navigation conventions:

- The Eddept Home Page is referred to as “H”, and is at www.usps.org/eddept .
- The Scheduling page (“S”) is reached by H->”Manage Public Programs”(M)->”Register Boating Courses (HQ800) (“R)”. This means go to “H”, then select the “Manage Public Programs”(M) link or pull down, then select the link or pull down “Register Boating Courses(HQ800) (R).
- The SEO/DEO tools page (“T”) is reached two ways; (1) H+M+R , then at the bottom left side of that page, click on ‘SEO/DEO Tools’, or (2) by “H”->”EdDept Tools”->”SEO Home Page”->”SEO tools” or “H”->”EdDept Tools”->”DEO Home Page”->”DEO Tools”.

Seminars

To Register a Seminar

To register a 5999 seminar or locate an existing one

- Go to “S”, (H+M+R) click on “Clear Form”
- Click on “Seminars”
- In the squadron section enter “5999” for the Nonesuch Squadron Account number and click on “Find”. This will take you to the Boating Course List for the “NoneSuch Squadron” and will be referred to as the List Page “L”.
- This will take you to the ‘Seminar List for NoneSuch Squadron’. Click on the “+” before the seminar listing you want to work with. If there is only one record which says “No Seminar data,” click on the “+” sign in front of it... The process stated above will be how to reach the 5999 List page and will be referred to as page “L” (the List Page).
- Select an item from that page (by clicking on the “+” sign) which will display the seminar details; this will be referred to as page “D” (the Details page).

- At this point you should know how to get to “H”, “S”, “L”, “M”, “R”, “D” and “T”. Bookmark each of the page designations (all except “D”).

Any member of the USPS with a valid certificate number will be authorized to do seminar maintenance for 5999. If you add or update a seminar you will automatically be the seminar contact and will receive the DEO notification for the schedule modification. Note: No actual notice is sent to the “DEO” just to you (for the purposes of this exercise).

Testing flow for a seminar

- Creating a seminar record is almost the same as creating a boating course record. You go to “S” (H+M+R), and instead on clicking on ‘Boating Courses’ radio button, you check the ‘Seminars’ radio button; then ‘Clear Form’ and enter 5999 in the Account box, the ‘Find’. If no seminars exist there is no default record only a button which says “... Add using 800 form” (this can be accessed by clicking the “+” at the top of the page), or If there is only one record which says “No Seminar data,” click on the “+” sign in front of it. Either way, a form is displayed that requires information about the planned seminar. Please fill in the form to the best of your ability. If a seminar is listed, clicking on the “+” in front of the listed seminar will produce a Details page (referred to as the “D” page). For the purpose of this exercise, change the date of the seminar to be something later than today’s date, and the type of seminar to be ‘Using GPS’, then click ‘Add, and then ‘Details’. Once created, the seminar has a “D” record and the Status should state “Open”, and there should be a link (right side of the page) to “Enrollment Management Tools”.
- One thing to note with seminars, the enrollment process works slightly differently from Boating Courses enrollment because there are no grades to be awarded. You attend them or you do not. Before the seminar is held you can enroll students or they can register online. However, once the seminar has occurred and the status is “Closed”, and operating status moves from “Enrollment Management” to “Attendee Management”, i.e., once the seminar is ‘Closed’, ‘Enrollment Management’ becomes ‘Attendee Management’. Any students entered after the seminar is held are may be marked as attendees and any who were enrolled may be marked as attended. Note seminar students are referred to as enrollees to distinguish them from boating course students and emphasize the difference.

Non Member Enrollment

- Seminar enrollment here is broken into general enrollment and member enrollment. Why the difference? It is much easier to enroll members than non-members. Note: You can enrollment members using the general enrollment process but it requires far more data entry. Let's look at general enrollment first. From the Details ("D") page of the seminar just registered, click on "Enrollment Management Tools, "then on "Enter General".
- The page returned is very similar to the boating course enrollment page. It has a certificate number field so it can be used to enroll members as well. Add several enrollee records (2) and click on 'Save'; the enrollees are entered and a 'Re-Display' shows the enrollment page; Click 'Clear at the bottom of the page to populate the list with the names of the enrollees. Each enrollee in the list is numbered, 1, 2, etc., to view the details of each enrollee record, enter their list number in the space provided and click on 'Show'. In this case, entry date and source, "E" (for entered) and "R" for registered online (these designations are shown after the Certificate # field of the individual enrollee details record of enrollment).

Enrolling Members

- Now let us try the "Enroll Members" process. Locate the Details ("D") record, click on "Enrollment Management Tools, and then on "Enroll Members". The resulting page allows you to enter members by either entering their certificate number or clicking on "Add Enrollments", or by clicking on "Add Enrollments" without a certificate number. If you chose the latter, you can search by Name or Nickname for the member, or you can check the box "from squadron members list" and select the member from the list. Enroll two (2) members. When you are done building a list click on "Post Enrollments" and the enrollees will be entered provided they are not already enrolled.

Locate a Seminar Near you

- Now look at the "Locate a Seminar near you" page (H+M+R+SEO/DEO Tools) and find this seminar. Go to the SEO/DEO Tools page ("T") and click on "View Public/Member Locate Course/Seminar/Courses Display". A digression: You will only see those "NoneSuch" Seminars for which you are the seminar contact. Note that when you created the record you automatically became the contact. Since the one you created was in zip code 27613 (unless you changed it), in order to see it you will need to pick some place near where it was held so enter Raleigh, NC or, if you changed it, one near the location. At the display you will

see the “NoneSuch” GPS seminar listed. Notice that “online registrations” are being accepted, so click on that link to register online.

Online Member Registration

- If you are logged on as a USPS member, the registration page asks you if you want to register as yourself. In this case, register yourself, and click “OK”. (If you want to register someone else (later), click “CANCEL”). Notice that your name is already filled in. Selected the box labeled “I am interested in pre-registering” And clicked “Submit” at the bottom of the page. Note if you are pre-registering yourself (1) with a certificate number no other information is required. The resulting page states that you are pre-registered. A notice is sent to the seminar contact (you) and a student record is created.

Online Non-Member Registration

- Back up to the seminar listing page and click on the registration link again, but this time pre-register as someone who was not a member. When asked to use your certificate number to register click on “Cancel”, then check ‘I am interested in pre-registering for the seminar’. Once you do that, all the personal information must be entered manually. Enter the data for one (1) student. When done, click on “Submit” and you get the successful pre-registration message. Note that when the registration page is used by non-members, they do not see the member price.

For a non-member to register online for a seminar (or boating course, or a course), completely independent of the process outlined above, go to the ‘USPS Home Page’, click on ‘Education’, then on ‘Courses and Seminars’, then on ‘Locate a Course or Seminar near you’, then enter your ‘zip code’, then ‘Locate’, then click on ‘Registrations “Here”’, then proceed to register as outlined above.

Seminar Enrollment Status

- To see what enrollment looks like go back to the Details page (“D”) for the course (back up until you get to the Registration page, ‘Clear Form’, enter 5999, select the ‘seminars’ radio button, then ‘Find’), click on “Enrollment Management Tools” then on “Enroll General” and see that you have ‘6’students enrolled in the GPS seminar. If you look at detailed enrollment records of those members who registered online (enter list #, then ‘Show’), the Status of **E** is posted (for Entered) and a Source of **R** (for online registration). The non-members who registered

online show a Status of **R** (for preregistered) and a Source of **R** (for online registration)

- Notice that some individuals may have a certificate number starting with a lower case letter ('z') indicating that they have been made a USPS University member. All online registrants (boating course or seminar) who were registered without a certificate number are automatically made USPS University members. In this case, it is a dummy certificate number, because it starts with a "z" (in 'real life' it will start with an "e").
- Note also that email addresses may have been validated since the students were added. This is done in the background every 15 minutes. If you entered a phony email address (as I did for some of the enrollees) you will get a message that the email address could not be validated.

Other Features

- At this point you may want to look at the other "Enrollment Management tools" for this seminar: Certs/Cards, List/Mail, and Spread Sheet. Refer to the tutorial ppt presentation on the HQ800 system distributed with the material you received. They present additional features for process information from those who are enrolled.

Attendee Management

- In our next step, we will close the seminar and the focus will switch to "Attendee Management".
- On and after the seminar date enrollees may be marked as attended. However, let us see what happens when the seminar date has passed.
- At this point close the seminar. Normally that would be done automatically by a nightly process the morning after the seminar has been presented. However, it can be done manually by going to the "D" page record and clicking on the "Close" button. Do that now. Backup to the 'Seminar Details Form and click on 'Close'.
- However, in order to enter attendees you must reschedule the seminar so that its start date is prior to today. This is a two-step operation; first step is to reschedule the seminar and the second step is to close it. Before closing the seminar, the Details ("D") page showed the number enrolled and the button was for "Enrollment Management Tools". After closing the seminar, a count of those

enrolled and those attended is shown. Click on 'Details' and note that the seminar is closed, 6 enrolled and 0 attended and the button has changed to "Attendee Management".

- If you click on "Attendee Management", you will see "Enroll Members" and "Enroll General", and note that the description of their functions is slightly different. They are now tailored to enter attendees of the seminar. When you enroll an individual you may indicate attendance, and for "Enroll Members" that is the default. If you do so, in addition to enrolling the individual as attended, a seminar completion form (ED46) is sent to HQ, and a seminar attended record is created in the seminar attended database. Other than that, the two work identical to their enrollment counterparts. Note however that for "NoneSuch" Squadron, actual ED46s and seminar attended records are not actually generated. You may also continue to update enrollee data using the "Enroll General" form after the seminar is closed.
- There is a new function on the 'Attendee Management' page called "Mark Attended". If you click on this link (do that now), a page will be displayed which shows the names of all enrolled students who have not been marked as attended (members and non-members) along with a checkbox for each name. If you check a box an ED46 is generated and sent to HQ and a seminar attended record for the student checked is created. For the purpose of this exercise, check the boxes for the 6 enrollees in this seminar, then Click 'Save'. The next page reports that ED46s were generated and attendance marked. Note: for the "NoneSuch" Squadron, the actual ED46 and seminar attended records are not generated, but in 'real life', they would be.
- Also present on the Attendee Management page is a function called "View Attendees". This provides a list of all students for this seminar for which an ED46 and a seminar attended record have been created. For "NoneSuch", this will always be an empty list because actual ED46s and seminar attended records are never generated, but in 'real life' they would be.

History Management Tools

Normally seminar attended (ED46s) reports can be viewed using the history tools found at SEO/DEO Tools ("T"). However, since "NoneSuch" ED46 records are not created, these functions are unavailable for "NoneSuch" training.

It is suggested that those participating in training review these additional functions on their own, using their own squadron's account number. These tools allow for searching and reporting on historical ED46 information (800-Boating Course/Seminar History Management Tools). They also allow for the entry of ED46 data which was never sent to HQ. Perhaps the single most useful function is the ability to locate a person who has attended a seminar and to print a replacement certificate. Another function which all SEOs should be aware of is the capability of crediting a member for attendance of a seminar which was reported without their certificate number. This may have occurred because the certificate number was never entered or was entered incorrectly. This happens frequently when an individual took a seminar when they were not a member and then joined USPS at a later date. If the member is not credited with the seminar in DB2000 or in the BOC candidate review process this function should be used to give them credit

Entering Missing ED46 data with the History Management Tools

An overlooked feature of the History Management Tools is the ability to enter missing seminar attendance which was never reported to HQ. If attendance is not reported, the member does not receive credit for the seminar and it does not appear in DB2000 nor is the attendance credited in the BOC program. If you go to the SEO/DEO Tools, then 'History...' and click on "Enter Missing USPS Member Seminar Attendance" or "Enter Missing non-member Seminar Completions", a form very similar to the Attendee management member or general form will be displayed. The primary difference is that instead of getting seminar information from a Seminar 800 record you manually enter seminar information at the top of the form. When you complete entering the list of attendees and click on "Post Attendance /Submit" an ED46 record is created for each attendee and sent to HQ and added to the online seminar attended database.