This manual is to assist the Regional Professional Development Center’s Regional Consultants in the operation and use of the RPDC Consultants Log System.
## Revision History

<table>
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<tr>
<th>Date</th>
<th>Revision</th>
<th>Author</th>
<th>Changes</th>
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<tbody>
<tr>
<td>10/03/2013</td>
<td>1.0</td>
<td>Rebecca Oesterly</td>
<td>Creation of Original Document</td>
</tr>
<tr>
<td>10/10/2013</td>
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<td>Rebecca Oesterly</td>
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</tr>
<tr>
<td>05/15/2014</td>
<td>1.2</td>
<td>Rebecca Oesterly</td>
<td>Updates to Document to capture enhancements made during the Enhancement Project</td>
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What will I see when I log in as a Regional Consultant?

You will see your home page, which is your Calendar page. If you have existing events that have log data associated, then the Event ID will display in blue font color; if you have an event that does NOT have log data, then the Event ID will display in red font color until you add log data and save it.

What can I do on my Personal Calendar?

Calendar Navigation
You may navigate back one year by clicking the Previous Year button; you may move back one prior month by clicking the Previous Month button; you may navigate to the current month by clicking the Current Month button; you may navigate to the next month by clicking the Next Month button; and you may navigate forward one year by clicking the Next Year button.
Events Needing Log Data Page <Report>

You may click the Events Needing Log Data button. This will display all open logs that have the Event Data section of the Event Data page empty. You may print this report by clicking on the Print button. If you have open logs that are missing the Event Data Log(s), then the system will generate a “report” which displays event ID’s that still require log data.

You may click on the Event ID link. If it is an event that you are a RPDC staff member, you will see your event in edit view. If you are looking at someone else’s report, you will see the Event Data page in read only view.

To return to your calendar simply click the RPDC Home link on the left navigation.

<table>
<thead>
<tr>
<th>Event Id</th>
<th>Event Title</th>
<th>Event Type</th>
<th>Event Location</th>
<th>Event Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-213-2</td>
<td>Test creator not Idd as staff assigned RC as staff &amp; save</td>
<td></td>
<td>1: Rose RPDC Con</td>
<td></td>
</tr>
<tr>
<td>1-913-35</td>
<td>Assign to RC</td>
<td></td>
<td>1: Rose RPDC Con</td>
<td></td>
</tr>
<tr>
<td>1-913-36</td>
<td>test</td>
<td>Technical Assistance</td>
<td>Other Location</td>
<td>1: Rose RPDC Con</td>
</tr>
<tr>
<td>1-913-37</td>
<td>test</td>
<td></td>
<td>1: Rose RPDC Con</td>
<td></td>
</tr>
</tbody>
</table>

Click an Event Number to open the event.

If you are not missing log data on any open events, then the system will generate the following message: No report data found.
Events Assigned to Me Page <Report>

You may click the Events Assigned to Me button. This will display all open logs for events that you have been assigned to. You may print this report by clicking on the Print button. If you click on the Event ID link, the system will display that event.

You may click on the Event ID link. If it is an event that you are a RPDC staff member, you will see your event in edit view. If you are looking at someone else’s report, you will see the Event Data page in read only view.

To return to your calendar simply click the RPDC Home link on the left navigation.

If there no open logs for you then the system will generate the following:

Events Assigned To Me

<table>
<thead>
<tr>
<th>Event Id</th>
<th>Event Title</th>
<th>Event Type</th>
<th>Event Location</th>
<th>Event Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No report data found.
Other things you may do from your Calendar view

**You may select the Paid Leave checkbox.** This is a visual indicator to other staff members that you have designated this day as a “Paid Leave” day. You still have the option to de-select it, and other staff members may still select you for an event for that day.

If you have been selected to attend an event for the day you have marked as paid leave, you have the following options:

1. You may choose to leave the Paid Leave box check marked and attend the event; you would record your Event Log Data on your Event Data page with the Type of Day equal to WORK DAY; OR
2. You may choose to de-select the paid leave checkmark and attend the event; OR
3. If you choose to not attend. To do this, simply go into your event data page, enter a Event Log Data DATE equal to the date of the event, and select the Type of Day as DID NOT ATTEND. Click the Add Log Data button. This will display this record under the log data records view. Make sure you click the Save button! If you do not click the Save button, your data will not be saved!!! By selecting the Type of Day equal to DID NOT ATTEND, you have disassociated yourself from this event. When this log is submitted to DESE, it will not trigger any low or high edits.

**You may Add an Event.** Click the Add Event link on the day you would like to create the event. The system will open the Event Data page with all fields open for adding data. We will discuss, in detail, the Event Data page later in this manual.

**You may Access your own Existing Event.** Click the Event ID number listed on the calendar that you would like to open. This will display your view of the event data page in edit view. We will discuss, in detail, the Event Data page for editing later in this manual.
How do I Create / Add an Event?

To add a new event, go to your personal calendar and click the Add Event link for the calendar month, day and year. This will display your Event Data page with all fields ready for data entry.
If you are simply setting up an event and are NOT planning to a participant BUT you don’t know who the RPDC staff will be, or which District/Building will be affected, simply do the following:

1. Enter your Event Title (this is required)
2. Enter your Begin Date (this is required and defaults to the calendar day you selected)
3. Select yourself as the RPDC Staff (there must be at least ONE RPDC staff member identified)
4. Enter the same date equal to your Begin Date into the Event Log Data section. Select the Type of Day equal to DID NOT ATTEND.
5. Click the Add Log Data button. The page will refresh and display this log in the records view portion of the Event Log Data segment.
6. **Click the SAVE button!!!!!!** Make sure you view the message at the top of the page which will read Event Data has been saved. If you don’t use the SAVE button, you will LOSE ALL YOUR DATA!!

Now your calendar will display this event ID on the day equal to the begin date selected. If there is no log data associated, the Event ID will display in a red font color. You may go into this event at a later time and select the RPDC staff. You may also enter the Event Participant Count segment fields if you wish. If you add an Event Participant Count data, **click the Add Participant Count button.** This will display this newly added record in the display section of this segment. **Remember to click the SAVE button!!!!!!** All identified RPDC staff members will now have this event ID displayed on their calendars. The identified staff members can open their own event data page and then begin entering log data.

If you are setting up the event and are NOT going to a participant but KNOW who the staff will be, simply create the event and do the following:

1. Enter the Event Title
2. Enter Event Begin Date
3. Select the identified RPDC staff member(s)
4. **Click the SAVE button!!!!!!** The event ID will be displayed on all identified staff member’s calendars. The event ID will NOT display on your personal calendar.
How do I Create a Sign-In Sheet?

First select an existing event data page from your calendar view. If you select the Add Event option, you will not see the Create Sign In Sheet button.

Next step is to click the Create Sign In Sheet button. This will open a separate “pop up” page, File Download, which will allow you to start the exporting process to your computer. This pop up page will ask, “Do you want to open or save this file?” Click the SAVE button.

This will then generate a “pop up” page that is a “Save As” page. The default file name listed is: SignInSheet. You may choose to rename the file if you wish. Suggested practice is to name it SignInSheet + event number (SignInSheet 1-913-1 for example).

Next, select your target drive to save your exported excel file. Once you have identified your target drive, click the SAVE button on the “Save As” pop up page.
Your excel Sign In Sheet is now saved to your target destination; the “Save As” pop up page closes. You’ll next see a pop up message “Download Complete”. Click the CLOSE button. The Download Complete pop up message closes and you will remain on the Event Data page.

You’re now ready to go your excel Sign In Sheet and begin the sign in process at your site location. The excel format will display the following:

- **Event ID** (not the actual event number like 1-913-1, this is an internal ID and it maps this excel spreadsheet back to the appropriate event when you go to import it!)
- **Event Number** (this is the actual event number you see on the event data page 1-913-1)
- **Begin Date** (this is the Begin Date that is saved on the Event Data page)
- **Event Title** (this is the Event Title that is saved on the Event Data page)

- **First Name** (this is an open field)
- **Last Name** (this is an open field)
- **District/Agency** (this has a drop down button and options)
- **Building** (this has a drop down button and options mapped to the District/Agency selected)
- **Type** (this is the participant type – Admin, Teacher, Other)

Once you have completed entry work, simply save your excel spreadsheet. You’re now ready to start the import process!
How do I Import a Sign-in Sheet?

First open the Event Data page that you used to create the Sign In Sheet. Next click the Import Sign In Sheet button. The page will refresh and you’ll see some additional components – “Enter the location of the Sign In Sheet to submit: <browse data field>; the Browse button; and the Upload button.

You’ll also see a “pop up” page – “Choose File to Upload”. This allows you to begin the selection process. Browse to the target drive where you saved your excel Sign In Sheet and select the file. The “Choose File to Upload” page now displays the target Sign In Sheet in the File Name data field of this page. Click the Open button. The “Choose File to Upload” pop up page closes, and you now see the File Path and the File Name in the Browse <data field> on the Event Data page.
Next click the Upload button. The system refreshes the page and displays the District/Agency, Building and Participant Count record(s) in the existing Participant Event Counts viewing window.

**NOTE:** In order to save these uploaded Event Participant Count records, you **MUST** click the SAVE button on the Event Data page. If you don’t click the Save button, you will lose this data and will have to re-import it!!!!

**Helpful Hints:** If you have multiple, SAME-KIND, District/Agency and Building combinations on your excel spreadsheet, the system will roll these multiple records into one record in the existing event participant count viewing window, and will add up all participant counts for the Teachers, Admin, and Other.

If you have already existing event participant count records, PRIOR to creating the sign in sheet, and you enter a District/Building combination on your excel sign in sheet that already is in existence on your Event Data page, the system will disregard this record. You MUST use the Edit button on the displayed record to update the counts.

If you have already existing event participant count records, PRIOR to creating the sign in sheet, and your sign in sheet has records that do NOT match the existing District/Building combination, the system allows you to upload these records. **Remember to click the SAVE button after doing so.**

If you have an Event Data page open and attempt to import a Sign In Sheet that was created through another Event Data page, the system will display an error message you attempt to save it. The system checks to see if the Event ID (not the event number) on the Event Data page matches the Event ID listed on the excel Sign In Sheet.
How can I Edit My Own Existing Event?

Go to your personal calendar and click on the Event ID link that you would like to edit. The system displays the Event Data page in edit view. If there are NO Event Log Data records associated to this event for you OR other assigned RPDC staff members, then a Delete button will be displayed. This is the only condition that will allow a user to delete an event from the system. The Delete button will perform a soft delete and remove this event from all assigned RPDC staff calendars. If the system detects any logs associated with an event (for yourself or other staff), the Delete button will NOT display.

The Event Information section and the Event Participant Count sections will display the same data on all assigned RPDC staff for this event. The Event Log Data section is completely yours. This data is NOT reflected on any other assigned RPDC staff member’s event data view.

You’ll notice that this event has an associated log data record — the Delete button is NOT displayed. However, you may still delete an Event Participant Count record or an Event Data Log record.
You may also delete an event in its entirety if the following conditions are true:

- You do NOT have log data saved to this Event ID record and/or
- No other assigned RPDC staff have log data saved to this Event ID record

If the above condition(s) is true, then you will see the delete button at the bottom on the page. Click the Delete button, the system will ask if you’re sure about deleting. Click Yes, if you’re sure.

The system has deleted this event from your calendar and also from any other assigned RPDC staff members.
You may edit the fields in the Event Information section of the page. *Please keep in mind, that any changes made in this section, will affect any other identified staff member’s view of the event data page.*

You may edit an existing Event Participant Count record for the actual Participant Count types (Teachers, Admin, and Other). Remember to click the Edit button to open these fields for editing. Remember to click the Update button to add these edits for the record selected. *Please keep in mind, that any changes made in this section, will affect any other identified staff member’s view of the event data page.*

You may delete an existing Event Participant Count record. Click the Delete button located next to the event participant count record.

You may add a new Event Participant Count record. Remember to click the Add Participant Count button to display the new record in the viewing window of this section.

**Remember to click the SAVE button after making changes!!!!**
You may **edit** the fields in an existing Event Log Data record. Click the edit button next to the record. The system will allow you to change the Hour Type and the actual time. Click the Update button to display the edits.

You may **delete** an existing Event Log Data record. Click the Delete button next to the record.

You may **add** a new Event Log Data. Enter all data and click the Add Log Data button.

**Remember to click the SAVE button after making changes!!!!**
What do the Reports do?

Here’s a brief description
All reports in the Left Navigation will have an initial ad-hoc search options for you to pick from. All require a Date to be selected; a grouping to be selected, and all of them also have a Display button.

When you click on the Display button, the system performs a search that matches the internal criteria assigned to the report selected and the external ad-hoc criteria selected. The system returns the results on the page within the system. You will see the SSRS report reviewer toolbar at the top of the report. This is what you’ll use to navigate between multiple pages, export to excel, csv or PDF, or to print.

Example of the toolbar

What does the toolbar do?
If there are multiple pages, the toolbar will display 1 ... of 5, etc. You may either enter the number in the text box or use the navigation icons listed. You also have a number of options when it comes to exporting the report (see screen shot above).

Now let’s get started with the Reports!
What does the All RPDC Events Report do?

This report allows you to see all open consultant logs for a specific month/year and to return the results according to either a Specific Region or Statewide. Select the Month/Year date and pick a region to display. If there are no events for a particular month/year, then you will not see it as an option. Click the Display button. System will then search for the open logs that match the date selected.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Preliminary Monthly Consultant Report do?

This report allows you to see all open, unsubmitted consultant logs for a specific month/year and to return the results according to a Specific Consultant, Specific Region or Statewide. Select the Month/Year date and pick a Region equal to a specific Region or Statewide to display. If you pick a particular consultant or region does not have any open, unsubmitted consultant logs, then the system will not return any records. After selecting your Month/Year, and Region or Consultant, then click the Display button. System will then search for the open logs that match the date selected, consultant and/or region selected. If you selected state wide, the system will search for all open, unsubmitted event logs for all regions. If system finds open, unsubmitted event logs that match the search criteria selected, the system will refresh the page and display the results in report format within the SSRS report viewer.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Event Log Data by Date Report do?

This report provides the user the ability to review all unsubmitted (open) event log data for a consultant according to the date the user selected for the log on the event data page. It also ties in the event ID number, the type of hour and hours logged to the type, and the Initiative Type selected including the CW (Collaborative Work) Detail value associated if the User has an initiative type equal to Collaborative Work (CW). For Regional Director and Consultants, this report will provide data to help assess if time needs to be adjusted between initiatives prior to submitting to DESE.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Initiative by Percent report do?

This report provides a summarization of submitted (closed) consultants log hours displayed in a percentage by the initiative type. The data is collected from the Event ID related log, RPDC Staff, the Initiative Type and hours logged. User may group the return by searching for All Consultants, All Regions; or Statewide (all regions).

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Initiative Report do?

This report provides a summarization of submitted (closed) consultants log data tied to the Event ID; RPDC Staff member; the Initiative Type and related Hours Logged / Type; and Mode of Contact. System default search/return criteria are Event ID number equal to submitted (closed logs) and date (MM/YYYY or YYYY). User may group the return by searching for a Consultant, Region; or All Regions.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Submitted Monthly Log History Report do?

This report provides a history record of all submitted monthly logs. User may group the return by searching for a specific Region; or a specific Consultant.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Submitted Monthly Log Edit History report do?

This report provides a history record of all submitted monthly logs that the system detected a high or low edits associated to the log record. The Submitted Monthly Log Edit History report displays the corrected High Edit with a status of corrected. If the User corrected the Low Edit, it also will display the status as corrected. If the User submits a Low Edit log without correction, this report will display the status as submitted.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Quarterly Log by Initiative Report do?

This report provides a summarization of submitted (closed) consultants log hours displayed in a percentage by the initiative type based a quarterly time period. The data is collected from the Event ID related log, RPDC Staff, the Initiative Type and hours logged. User may group the return by searching for All Consultants, a specific Region; All Regions; or Statewide (all regions).

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Yearly Log by Initiative Report do?

This report provides a summarization of submitted (closed) consultants log hours displayed in a percentage by the initiative type based a yearly time period. The data is collected from the Event ID related log, RPDC Staff, the Initiative Type and hours logged. User may group the return by searching for a specific Region; All Regions; or Statewide (all regions).

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Monthly Logs by Event Report do?

This report provides a summarization of submitted (closed) consultants log data tied to the Event ID; RPDC Staff member; the Initiative Type and related Hours Logged / Type; and Mode of Contact. System default search/return criteria are Event ID number equal to submitted (closed logs). User may group the return by searching for submitted monthly log date MM/YYYY; for a Region; or All Regions.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Monthly Logs by Initiative Report do?

This report provides a summarization of submitted (closed) consultants log data tied to the Event ID; RPDC Staff member; the Initiative Type and related Hours Logged / Type; and Mode of Contact as it relates to the associated Initiative Type. System default search/return criteria are Event ID number equal to submitted (closed logs). User may group the return by searching for submitted monthly log date MM/YYYY; for a specific Consultant, a Region; or All Regions.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Monthly Consultant Log Report do?

This report provides a summarization of all closed (submitted) event log data by Regional Consultant. User may group the return by searching for a specific consultant a Region, or Statewide (displays all regional staff in one report as separate page for each consultant).

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Monthly Participant Count Report do?

This report provides a summarization of all closed (submitted) event log data by Regional Consultant. This specific focus of this report is to display all District/Agency, Building and related Participant Counts. User may group the return by searching for a specific consultant, a specific Region, or Statewide (displays all regional staff in one report as separate page for each consultant).

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.
What does the Collaborative Work Data Report do?

This report provides the user the ability to review submitted (closed) event log data that is specific to the Initiative Type equal to Collaborative Work. Certain Regional Professional Development Centers require the tracking of this specific initiative type. The report also displays the Event ID the log is tied, staff, type of hours and hours logged to type, mode of contact, the event type and participant count. The submittal date field is required. You may select either a specific Region or All Regions or a specific Consultant, this is also required.

If you would like export your report, click the export (floppy disk) icon within the SSRS Toolbar. This will display the exporting options provided within the SSRS toolbar, as explained under the Brief Description section of this manual. After exporting, you may use excel or PDF print options for printing the report.