

ProCert Manual Administrator

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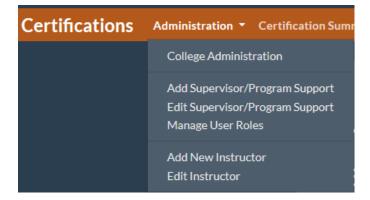
Site Administrator Functions

This is document intended to show how each of the functions work for a Site Administrator. A Site Administrator is the overall manager of the Professional Certification system, and could be a Dean, President or other officer in charge of the overall academic staff.

Note that the Administrative Assistant can do all the same functions as the actual administrator, with the exception of un-approving certifications.

Administration Menu

The Administrator menu item contains six menu choices, Add instructors and Edit instructors. This is where instructor accounts are created and maintained.



College Administration

The **College Administration** page is where the overall settings for a particular college are set. In addition to the name of the college, the following sections are provided:

- Choose Administrative/Administrative Support person: This dropdown list allows the administrator or administrative assistant to change who is denoted as the Site Administrator or Administrative Support for the college. If the logged in user is an Administrator, they can change the Administrative Support person. If the logged in user is Administrative Support, the label changes to Administrative person and they can assign a new Administrator.
- Note that changing the administrator or administrative support to a new person will deactivate the previous administrator.
- Email Notification Time Frames: These sections allow the administrator to set the length of time (in days) when reminder and warning emails are sent to instructors prior to the expiration of Vocations Certificates and/or First Aid/CPR Certificates.
- **Required Standards**: The list of check boxes show the standards that can be set for various certifications. Clicking a checkbox on will make that standard required for all instructors, meaning that they must have a development plan that addresses those items.

When all changes are made, click the **Save Changes** button to complete, or **Reset Form** to discard changes.

Certifications Administration - Certification Summ	nary First Aid/Bloodborne Pathogens Summary N	
Coll	ege Administration	
	Name of College >	Test College
Choose	the Administrative person from the list belo	
	User >	Oliver Adminsky 🛩
	rre Email Notification Time-frames 🦸	uuld ranaise sutomatic annal ramindar
	CPR Certificate:	
	Reminder Interval	, 45 ∽
	Warning Interval >	20 ~
Vocation:	al Certificate: Reminder Interval	, 90 ~
	Warning Interval >	
	ed Standards i	
Select three	or more standards indicated as required for your institution, for super	
	Instructor Standards >	Manage Learning Environments
		Develop Outcomes, Assessments and Curricula
		Develop and Review Programs
		Provide Student Instruction
		Provide Support and Guidance to Students
		Perform Administrative Functions
		Create and Maintain a Professional Environment
		Promote the Program and Recruit Students
		Learn and Adapt New Technologies
		Perform Program Management Functions
		Save Changes Reset Form

Add Supervisor/Program Support

Add Supervisor/Program Support brings you to a page where you can add a new Supervisor or Program Support person. These are users that can be assigned to manage or support academic programs and instructors.

The fields on the page are marked with an arrow if they are required. The non-required fields for cert expirations can be used if the user will also be added as an instructor (see **Manage User Roles** below). They can be left blank if not needed.

Two checkboxes are available:

- Is Active: When this checkbox is selected, the user is marked as active. Otherwise, the user is created but not active for use.
- **Send Notification**: Check this box to send a confirmation email to the user for them to complete their account creation (password choice & security questions).

Certifications	Administration * Certification Summary First Aid/Bloodbo	rne Pathogens Summary Manage Prog	rrams ▼ My Account
	Add Supervisor/	Program Support	
		Account Type >	Supervisor 😪
		First Name >	First Name
		Last Name »	Last Name
			Emails restricted to edu domains only
		Email »	
		Phone >	
		Programs	Programs can be assigned to a Supervisor on the user edit page, or program edit page
		First Aid/CPR Expires	mm/dd/yyyy 🎫
		Bloodborne Pathogens Expires	mm/dd/yyyy 🖼
		Prof/Tech Cert Expires	mm/dd/yyyy 🎟
		Certification Length	O 3 year 🔍 5 years
		Off-site Certification?	•
		Is Active?	
		Send New Account Email?	• +
		Save Ac	count Reset Form

When all entries are made, click the **Save Account** button to complete, or **Reset Form** to discard changes. If the Send Notification checkbox is selected, the confirmation email will be sent as below:

Your account to the Professional Certification application has been reset.

To login you must first re-create your password and choose your new security questions. To do so, click the link below or paste the entire url into a browser.

Application URL: https://devapps.sbctc.edu/procertv2/NewAccount/nvz_wVvpQ42R9FG

If you have any questions regarding access to this application, please contact the <u>Help Desk</u>.

Please do not respond to this email, as the account is not monitored

After saving the new user, the screen changes to the **Edit User** page when programs can be assigned.

Edit Supervisor/Program Support

The **Edit Supervisor/Program Support** page is nearly identical to the **Add** page shown above. The difference is the **Program(s)** section shows all active programs and allows the administrator to assign programs to the user. To find a user to edit, select the user from the dropdown list that appears when you first enter the page.

This page is used to update any information about a user that has changed since the first creation of their account. The user to edit is chosen from the dropdown list on the page.

In the **Program(s)** section, the administrator can assign any of the active programs to the supervisor (or program support) person by clicking on the check boxes next to each program name. Note that each program can have only one Supervisor and one Program Support person, so assigning a program to a user will remove that program from any previously assigned user of that role type. However, one user or support person may supervise multiple programs.

Clicking the **Save Account** button will save the changes made. **Reset Form** will discard any changes. **Reset Password** will send the user an email similar to the one shown above with a link to a page where they can select a new password and security questions.

Edit Supervisor/	Program Support	
required fields		
	Select a User	Oliver Supervisor 🗸
	User Name	Supervisor1
	Account Type	Program Supervisor
	First Name →	Oliver
	Last Name 🤉	Supervisor
	FacultyType >	O Full Time 🔍 Part Time
	Email >	appdev@sbctc.edu
	Phone >	(360) 704-4376
	Program(s)	Northwest Painting Z Test Development
		Whole Food Cooking Auto Emmissions
	First Aid/CPR Expires	Exempt
	Bloodborne Pathogens Expires	Exempt
	Prof/Tech Cert Expires	Exempt
	Certification Length >	O 3 year Syears
	Off-site Certification?	•
	Is Active?	•
	Save Account	Reset Form Reset Password
		i

Manage User Roles

When users are created (other than Administrator or Administrative Support), they are assigned their default user roles (Supervisor, Program Support, or Instructor). If a user needs to be assigned (or removed) from a role, it can be done here.

Selecting a user from the dropdown list shows the role they are assigned to. To assign a user to another role (or in addition to their current role), you can click the check boxes to manage. For example, a Program Supervisor could also be an Instructor.

Note that Administrator and Administrative Support roles are assigned in the **College Administration** section described above.

Clicking the **Save Account** button will save the changes made. **Reset Form** will discard any changes.

	ou should go to the rele	u will then be able to add them to a new role type. evant edit page to add programs as needed. more
Available role type	es that can	be managed
Supervisor	Can supervise one t	o many programs, and requires a Supervision Certification.
Program Support	Same as a superviso	r, but does not require a Supervision Certification.
Instructor	Restricted to a singl assigned to.	e program and used to maintain a Professional Certification for the program
	Select a User	Oliver Supervisor 🖌
	Role Type(s)	Instructor
		Program Supervisor
		Program Support
		Save Role(s) Reset Form

Add New Instructor

This screen allows administrators to add new instructors to the system. The page is similar to the Add/Edit Supervisor/Program Support pages, with the addition of a dropdown list for **Programs**. This is a required field, each instructor must be assigned to a program.

Note that each instructor can only be in one program.

Clicking the **Save Account** button will save the changes made. **Reset Form** will discard any changes.

Add Instructor		
	First Name 🔸	First Name
	Last Name 🔸	Last Name
	FacultyType	O Full Time 🔍 Part Time
	Email >	
	Phone >	
	Program >	Select Program 🗸
	First Aid/CPR Expires	mm/dd/yyyy
	Bloodborne Pathogens Expires	mm/dd/yyyy
	Prof/Tech Cert Expires	mm/dd/yyyy
	Certification Length	O 3 year 🔍 5 years
	Is Active?	•
	Send New Account Email?	•
	Save Accourt	nt Reset Form

Edit Instructor

To edit an instructor's account, select the instructor name from the dropdown list provided. Once the instructor information appears, the same fields as the Add New Instructor appears, with the same required fields. Changes may then be made to the instructor's account.

Edit Instructor Select an instructor from the drop-down list to edit the account Oliver Supervisor 🗡 User Name Oliver Supervisor 🖸 Full Time 🔍 Part Time appdev@sbctc.edu Email » (360) 704-4376 Phone > Northwest Painting 🗸 mm/dd/yyyy First Aid/CPR Expires mm/dd/yyyy Bloodborne Pathogens Expires mm/dd/yyyy Certification Length > Is Active? Reset Form Reset Account

Clicking the Save Account button will save the changes made. Reset Form will discard any changes.

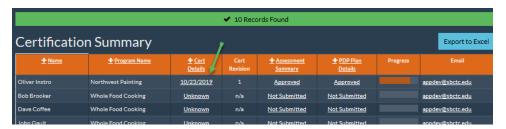
Certification Summary

The Certification Summary page shows all instructors in the college that have certifications in ProCert. The active columns allow interaction with the instructor's certifications, if submitted. Inactive columns (no links on the text) are for informational purposes. Columns indicated with a plus sign (+) can be sorted by clicking on the heading.

			🖌 10 Reco	ords Found			
Certificati	on Summary						Export to
<u>+ Name</u>	± Program Name	<u>+ Cert</u> Details	Cert Revision	<u>+ Assessment</u> <u>Summary</u>	+ PDP Plan Details	Progress	Email
Bob Brooker	Whole Food Cooking	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Dave Coffee	Whole Food Cooking	Unknown		Not Submitted	Not Submitted		appdev@sbctc.edu
John Gault	Whole Food Cooking	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Madee Joohanson	Whole Food Cooking	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Oliver Instro	Northwest Painting	10/23/2019		Approved	Approved		appdev@sbctc.edu
Oliver Supervisor	Northwest Painting	Unknown		Not Submitted	Not Submitted		appdev@sbctc.edu
Robert Williams	Northwest Painting	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Sandy Porterman	Whole Food Cooking	Unknown		Not Submitted	Not Submitted		appdev@sbctc.edu
Terry Indorsoon	Northwest Painting	Unknown		Not Submitted	Not Submitted		appdev@sbctc.edu
Tom Instro	Northwest Painting	Unknown		Not Submitted	Not Submitted		appdev@sbctc.edu

Cert Details

If the instructor has submitted an assessment/development plan, a date will appear in the Cert Details column as a link. Clicking the date will bring up a page where the certification status and/or progress can be viewed and worked on. There are two sections to this page, **Certification Status** and **Certification Progress**, accessed by clicking on the orange banners for either.



Certification Status

For new PDP, the administrator may either return the Plan to the instructor for further review (usually after discussions or emails), or may **Approve** the Plan. Either are done by clicking on the appropriate check box. Note that no additional button needs to be clicked.

For final approval, the administrator checks off the appropriate check box.

Note that the survey approval must be done by the program supervisor or program support person. For administrators, these choices will always be inactive, they will only reflect what the supervisor has done.

After approving or returning a plan an email will be sent.

Assessment Plan Design Recent Activity Status Certification Started: 7/1/2019 Survey Submitted: 10/23/2019 Return Self-Assessment to Instructor for further review Survey Approved: 10/23/2019 Return Self-Assessment to Instructor for further review Plan Submitted: 10/23/2019 Return Self-Assessment to Instructor for further review Plan Submitted: 10/23/2019 Return Plan to Instructor for further review Plan Approved: 10/24/2019 Return Plan to Instructor for further review	Certification Started: 7/11/2019 Survey Submitted: 10/23/2019 Survey Approved: 10/23/2019 Plan Submitted: 10/23/2019 Plan Submitted: 10/23/2019 Return Plan to Instructor for further review
2 Survey Submitted: 10/23/2019 I Return Salf Assessment to Instructor for further review 3 Survey Approved: 10/23/2019 I Approved 4 Plan Submitted: 10/23/2019 I Return Plan to Instructor for further review 5 Plan Approved: 10/24/2019 I Approved	Survey Submitted: 10/23/2019 II Return Salf-Assessment to Instructor for further review Survey Approved: 10/23/2019 II Approved Plan Submitted: 10/23/2019 II Return Plan to Instructor for further review Plan Approved: 10/23/2019 II Approved
3 Survey Approved: 10/23/2019 Approved 4 Plan Submitted: 10/23/2019 Return Plan to Instructor for further review 5 Plan Approved: 10/24/2019 Approved	Survey Approved: 10/21/2019 Approved Plan Submitted: 10/23/2019 E Return Plan to Instructor for further review Plan Approved: 10/24/2019 Approved
Plan Submitted: 10/23/2019 Return Plan to Instructor for further review Plan Approved: 10/24/2019 Approved	Plan Submitted: 10/23/2019 Return Plan to Instructor for further review Plan Approved: 10/24/2019 Approved
5 Plan Approved: 10/24/2019 Approved	Plan Approved: 10/24/2019 Approved
	Return Plan to Supervisor for further review
Return Plan to Supervisor for further review	
7 Final Administrator Approval	Final Administrator Approval
	Final Administrator Approval

Certification Progress

The Certification Progress section allows the administrator to track the progress the instructor is making against their PDP. If the PDP has not been submitted yet, this section will be empty.

	tification Details								
aculty Name: Oliver Instro Revision: 1									
		Certification	n Status 🔻						
		Certification	Progress 🔺						
						Export to Excel			
	Standard Details	Activity Description	Activity Method	Due Date	Completed	Activity Notes minimum of 4 charecters			
<u>Edit</u>	A1 - Research, evaluate and obtain required equipment, systems, tools, supplies, and materials	This is what I'm going to do.	something			10/23/2019			
Edit	A2 - Set up, maintain and repair instructional systems, equipment and/or tools		something2						
Edit	B2 - Create, evaluate, and modify curriculum		something3						
<u>Edit</u>	C1 - Develop, review, and update program/course plan								
Edit	C2 - Recruit and work with advisory committee and employers to meet changing needs of the program and industry		That thing again			10/23/2019			

Cert Revision

This read-only column shows the latest revision number of the certification. This can show how many times the certification has been revised or updated.

			🖌 10 Reco	ords Found			
Certificatio	on Summary						Export to Excel
<u>+ Name</u>	+ Program Name	<u>+ Cert</u> <u>Details</u>	Cert Revision	<u>+ Assessment</u> <u>Summary</u>	<u>+ PDP Plan</u> <u>Details</u>	Progress	Email
Bob Brooker	Whole Food Cooking	<u>Unknown</u>	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Dave Coffee	Whole Food Cooking	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
John Gault	Whole Food Cooking	<u>Unknown</u>	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Madee Joohanson	Whole Food Cooking	<u>Unknown</u>	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Oliver Instro	Northwest Painting	<u>10/23/2019</u>	1	Approved	Approved		appdev@sbctc.edu
Oliver Supervisor	Northwest Painting	<u>Unknown</u>	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Robert Williams	Northwest Painting	<u>Unknown</u>	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Sandy Porterman	Whole Food Cooking	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Terry Indorsoon	Northwest Painting	Unknown	n/a	Not Submitted	Not Submitted		appdev@sbctc.edu
Tom Instro	Northwest Painting	Unknown		Not Submitted	Not Submitted		appdev@sbctc.edu

Assessment Summary

Clicking on a **Submitted** or **Approved** link in this column allows the administrator to review the assessment submitted by the instructor, and add any public or private notes as needed. The public notes will be viewable by the instructor and can contain feedback if the assessment survey must be returned for more work.

Certification	Self-	Asses	ssme	nt Worksheet	🖶 Print
				✓ 5 Records Found	
		Print this page	for review wit	h your instructor. Print in landscape mode for ease of us	se.
 Show All Key Activities OShow only chosen Standards 				Instructor Date Generated Revision	Oliver Instro 10/25/2019 1
Standard Key-Activity	Importance	Assessment	Selected	Notes (Viewable by all)	Notes (Admin Only)
A1 : Research, evaluate and obtain required equipment, systems, tools, supplies, and materials	Low	Low		10/23/2019 Save Notes	Save Admin Notes
A2 : Set up, maintain and repair instructional systems, equipment and/or tools	Medium	Low		Save Notes	Save Admin Notes
B2 : Create, evaluate, and modify curriculum	Low	Low		Save Notes	Save Admin Notes
C1 : Develop, review, and update program/course plan	Medium	High		Save Notes	Save Admin Notes
C2 : Recruit and work with advisory committee and employers to meet changing needs of the program and industry	Medium	Low		10/23/2019 Save Notes	Save Admin Notes

Once a PDP is approved, the instructor only needs to inform the supervisor when required activities have been completed. The supervisor can then check off the tasks using the **Certification Progress** section in **Certification Details** (as described above). Although the program supervisor is the usual person to check off tasks, the administrator and administrative support personnel may also check these items if needed.

PDP Plan Details

If the instructor has submitted their PDP, clicking on the **Submitted** or **Approved** link in this column allows the administrator to view the plan, and print or export to Excel.

Activity	Activity Description	Activity Method	Due Date	Notes
Research, evaluate and ain required equipment, ens, tools, supplies, and erials	This is what I'm going to do.	something		10/23/2019 10/23/2019 10/23/2019 10/23/2019 10/23/2019 10/23/2019 10/23/2019 10/23/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/22/2019 08/21/2019 08/21/2019 08/21/2019 08/21/2019

Email

The email column is "live" for immediate composition of an email. Clicking on the address will open your system's default email client and prepare a blank email from you to the selected instructor.

First Aid/Bloodborne Pathogens Summary

The First Aid/Bloodborne Pathogens Summary menu item is intended for maintaining the named certifications. Clicking the menu item will display the administrator's users in a table containing the dates the CPR/First Aid and Bloodborne Pathogens certifications will expire. Dates in **Red** are past due.

Editing

Clicking the **Edit** button on the left side of a table row will activate the **CPR/First Aid** and **Pathogens** Expires columns. The supervisor can then enter new dates for both of those as needed. Clicking **Save** will commit the changes, clicking **Cancel** will close the editing boxes and return to the default mode.

Checking the checkbox next to date field will mark date of Certificate as **Exempt**. Leave textbox blank if date is unknown.

Email column entries allow the administrator to send email to that particular user.

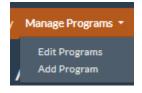
Send Bulk Email

The **Send Bulk Email** link at the bottom of the table will bring up an email client window with the "To:" field filled out with all unique email addresses that are blank or expired in the **CPR/First Aid** and **Pathogens** columns. The title is defaulted to "ProCert," but it can be changed and the message body filled out by the supervisor.

First Aid/Bloodborne Pathogens Summary 15 Records Found 							
īo set	o set a date as exempt, select check box when in edit mode. Export to Excel						
	Name Program Name First Aid/CPR Bloodborne Pathogens Email Role				Role		
Edit	David Randall				dcoffman@sbctc.edu	Program Supervisor	
Edit	Julie Car		Exempt	Exempt	appdev@sbctc.edu	Program Supervisor	
Edit	Kathy Goebel		Exempt		kgoebel@sbctc.edu	Program Supervisor	
Edit	Oliver Supervisor				appdev@sbctc.edu	Program Supervisor	
Edit	Paula Anderson				appdev@sbctc.edu	Program Supervisor	
Edit	Oliver Instro	Northwest Painting	Exempt	Exempt	appdev@sbctc.edu	Instructor	
Edit	Oliver Supervisor	Northwest Painting			appdev@sbctc.edu	Instructor	
Edit	Robert Williams	Northwest Painting	Exempt	Exempt	appdev@sbctc.edu	Instructor	
Edit	Terry Indorsoon	Northwest Painting		Exempt	appdev@sbctc.edu	Instructor	
<u>Edit</u>	Tom Instro	Northwest Painting			appdev@sbctc.edu	Instructor	
Edit	Bob Brooker	Whole Food Cooking			appdev@sbctc.edu	Instructor	
Edit	Dave Coffee	Whole Food Cooking	Exempt	Exempt	appdev@sbctc.edu	Instructor	
Edit	John Gault	Whole Food Cooking	Exempt	Exempt	appdev@sbctc.edu	Instructor	
Edit	Madee Joohanson	Whole Food Cooking	Exempt	Exempt	appdev@sbctc.edu	Instructor	
Edit	Sandy Porterman	Whole Food Cooking	Exempt	Exempt	appdev@sbctc.edu	Instructor	

Manage Programs

The **Manage Programs** menu has two menu items: **Edit Programs** and **Add Program**. This feature is how an administrator maintains the academic programs that instructors are assigned to.



Edit Programs

To edit an existing program, select the program name from the **Institutional Programs** dropdown list. Programs that are not currently active are shown in red. The editable fields for the program selected are then editable:

- Name of Program: Allows the changing of the program name. Note that this does not affect any users or instructors connected with the program. This is required.
- Program Description: a paragraph describing the program. Optional.
- Program Supervisor: The user that is assigned to supervise the instructors in this program. This is a required field. Note: a program can have only one supervisor, and changing the supervisor will replace the current one.
- Program assistant: This assigns a user as a supervisor assistant for the program. This is optional, and as with a supervisor there can be only one program assistant, so changing this will replace the existing assistant.
- Is Active: This checkbox indicates whether a program is active or not.

NOTE: De-activating a program will run a check first, to be sure there are no instructors still in the program. You can force a program to be deactivated, but this will remove all instructors from the program. Instructors that are not attached to a program will not have access to this web site until they are attached to another program. **WARNING:** This is not reversible.

Edit Programs		
	Institution Programs >	Select a program V
	Name of Program >	
	Program Description	
	Program Supervisor >	✓
	Program Assistant	✓
	Is Active	•
		rogram Reset Form
		i

Add Program

To add a new program, select this menu item and fill out the fields as shown. The same rules apply as in the **Edit Program** page. Program name and supervisor are the only required fields.

Add Program					
	Name of Program >				
	Program Description				
	Program Supervisor		Select Supe	rvisor 🗸	
	Program Assistant		Select Assis	tant 🗸	
	Is Active				
		Save P	Program	Reset Form	
			i		

Note: A program will not be available to assign to an instructor until it is Active.

My Account

Here is where a logged in user will maintain their account. User name and account are read-only. All other lines are editable.

Reset Password

Clicking this button will reset the account of the logged in user. This means a new password and three new security question/answer pairs need to be set, and an email will be sent to the user with a link to the page to update the information.

My Account			
Reset Password	Username	bgasser	
	Account Type	Administrative Support	
	First Name 🔸	Bob ×	
	Last Name 🕨	Gasser	
	Middle Initial		
	Street	Street	
	City	City	
		Zip	
	Email >	appdev@sbctc.edu	
	Phone >	(360) 704-4376	
	Si	ave Account	