

# Cal-E-Force

## Stakeholder Training on CBT Uploads

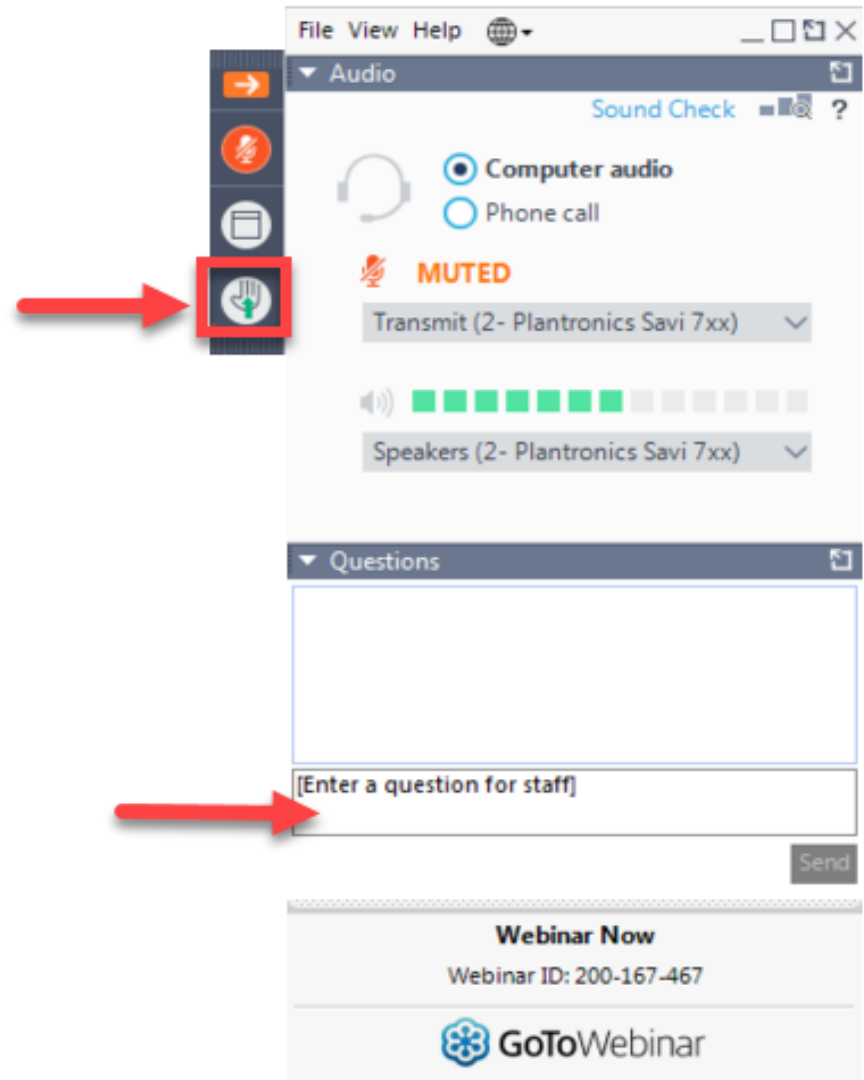
September 9, 2019 - 2:00 PM

September 11, 2019 - 11:00 AM



# Meeting Structure

- ❑ Using GoToWebinar - instructions for access were e-mailed when you registered
  - “Raise a hand” through GoToWebinar
  - Ask a question through GoToWebinar
- ❑ 1 hour session
  - 30 minute demo
  - 30 minutes sandbox time



# Welcome

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- ❑ Welcome to the Stakeholder Training on CBT Uploads
  - Introduction: Babette Davis/Tara Armstrong
  - Tour Presentation: Kelsey Oehrke/Clayton Olsen
  - Executive Representatives: Jill McAloon and/or Michael Cable
- ❑ Participants do not need to stay for the full session, if you feel comfortable with Cal-E-Force
- ❑ The sandbox is open and available.



# Session Goals

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## Current Efforts

- ❑ Demonstrate CBT Upload features of Cal-E-Force in a live Salesforce environment
- ❑ Current features to manage ETMS migrated contracts
  - User profile
  - Enrollments
  - Hours tracking
  - Invoicing
  - Revisions
  - Reporting

## Long Term

- ❑ Cal-E-Force will be updated over time
- ❑ Continued collection of recommendations and suggestions
- ❑ Will Address and Communicate:
  - Upcoming events
  - Production Availability
  - Support processes for users in production



# Why Salesforce & Cal-E-Force?

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## The benefits of the Salesforce Technology

- ❑ The platform is scalable and provides full cloud-computing capability
- ❑ Supports customized applications
- ❑ Stable and accessible platform for the ETMS and future ETP contract data
- ❑ Provides features required of a State of California IT System - Cal-E-Force is hosted in the Government Cloud
- ❑ Provides ETP built-in infrastructure for security, hardware, and connectivity

*Current information on user browser support and other features is available on the Salesforce website*



# Release 1.1 - 8/16/2019

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## ❑ Invoice Processing

- Internal and external users able to view invoices
- Invoice print form available to external users
- Notifications to external users when invoices are submitted and approved

## ❑ Enhanced Add/Edit Hours Tracking

- Maximum number of hours per trainee permitted by Job Number now enforced
- Error messages on training records submitted after trainee hits the maximum hours



# Release 1.2 - 8/29/2019

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## ❑ Invoice Processing

- Ability to create a “draft” invoice using upload invoicing information
- Ability to drop trainees using the Create Invoice function
- Calculation for retention end date has been corrected to 90 days

## ❑ CBT Upload Hours Feature

- Ability to upload CBT hours and edit the hours as needed
- Removed the requirement to e-mail CBT hours to Cal-E-Force administrators



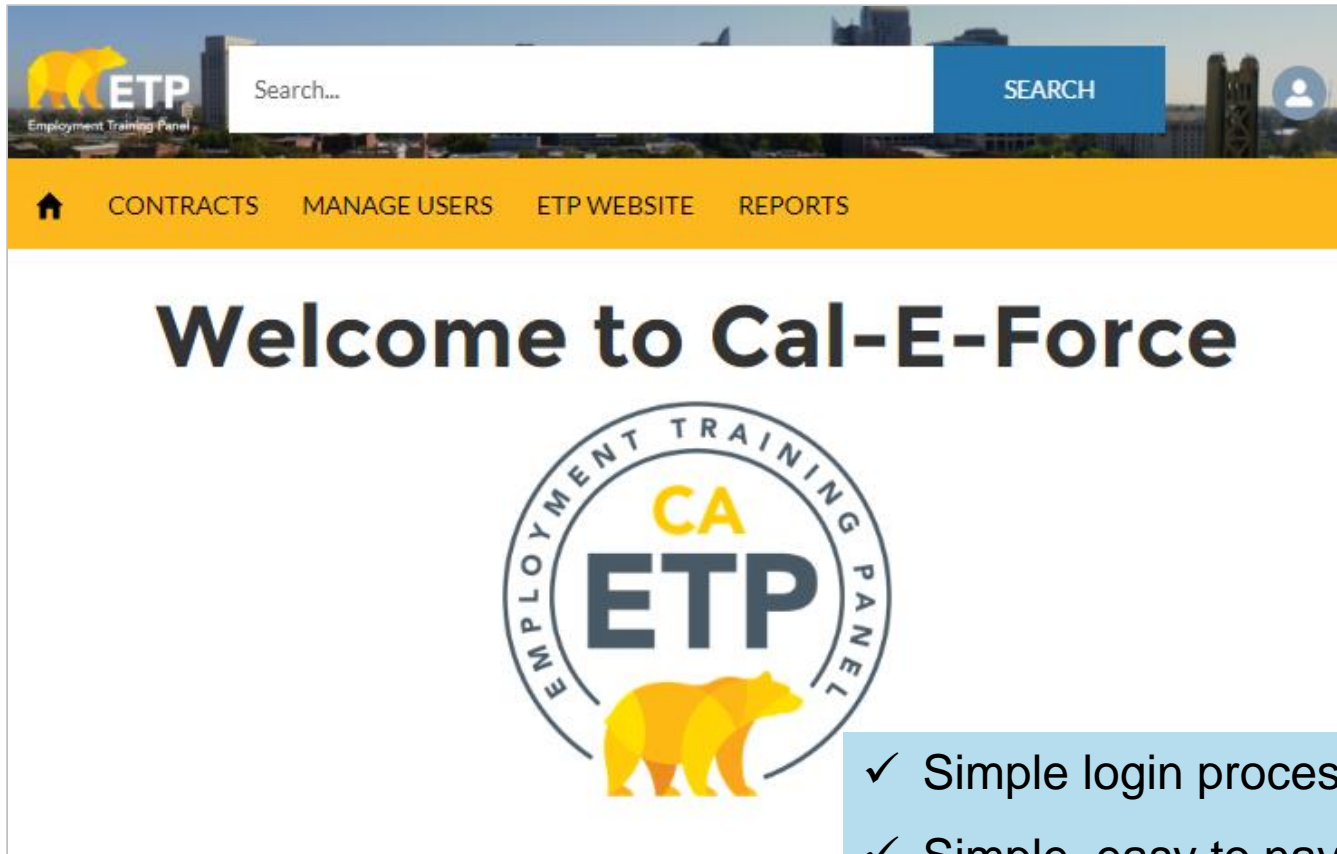
# Guided Tour of Cal-E-Force

Walk through of CBT Upload  
functionality






# Landing Page



Search... SEARCH

CONTRACTS MANAGE USERS ETP WEBSITE REPORTS

## Welcome to Cal-E-Force



- ✓ Simple login process
- ✓ Simple, easy to navigate, with quick links



# Contract Management (1 of 2)

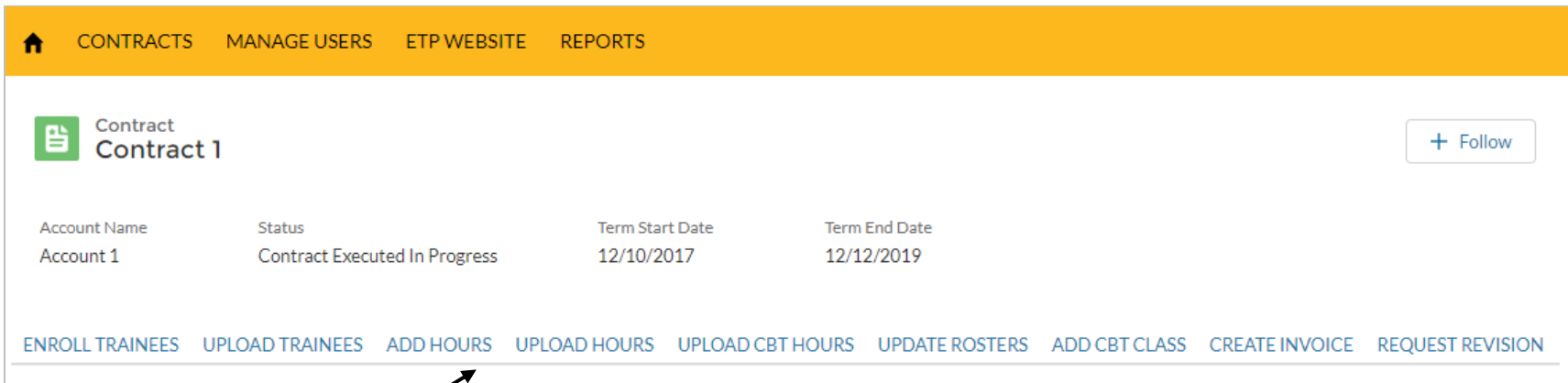
Contracts  
All Contracts ▾ ↗

1 item • Sorted by Contract Number • Filtered by all contracts • Updated 3 minutes ago

	Contract Number ↑	View Contract	Account Name	Status
1	Contract 1	<a href="#">View</a>	Account 1	Contract Executed In Progress



# Contract Management (2 of 2)



The screenshot shows a web interface for contract management. At the top is a navigation bar with links: HOME, CONTRACTS, MANAGE USERS, ETP WEBSITE, and REPORTS. Below this is a header for 'Contract 1' with a '+ Follow' button. A table displays contract details:

Account Name	Status	Term Start Date	Term End Date
Account 1	Contract Executed In Progress	12/10/2017	12/12/2019

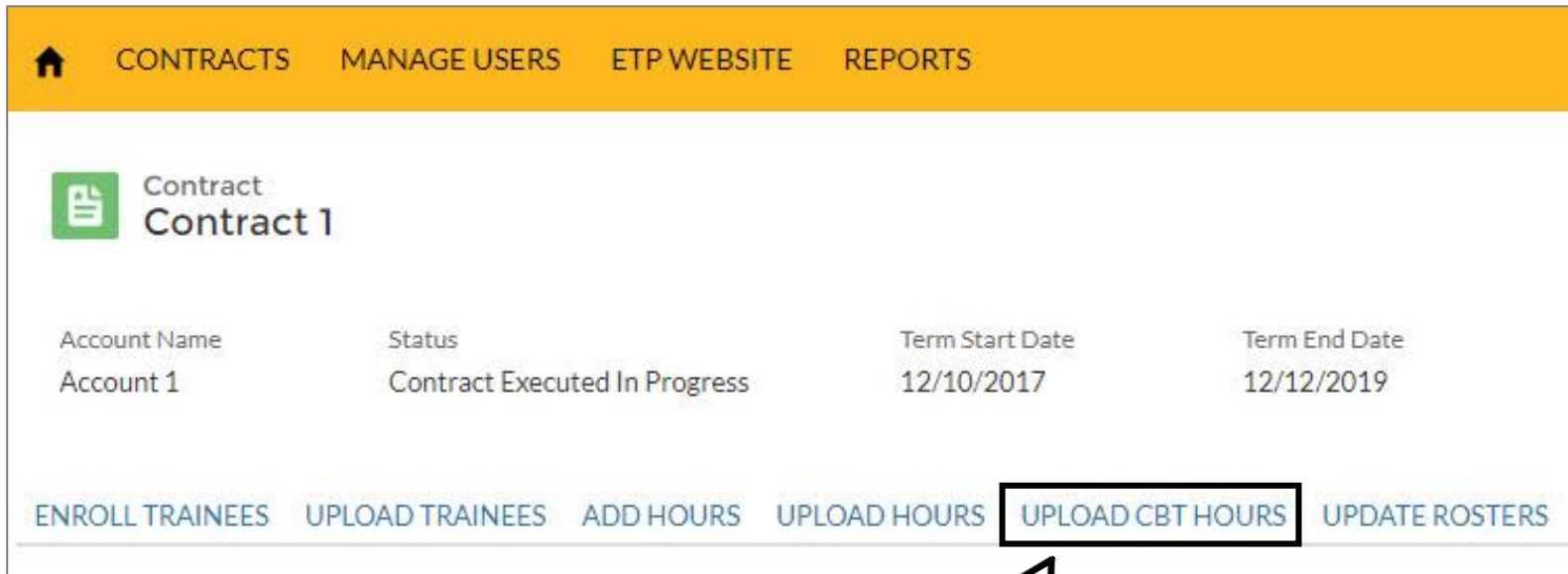
At the bottom of the contract detail view is a 'Button Bar' containing the following actions: ENROLL TRAINEES, UPLOAD TRAINEES, ADD HOURS, UPLOAD HOURS, UPLOAD CBT HOURS, UPDATE ROSTERS, ADD CBT CLASS, CREATE INVOICE, and REQUEST REVISION. An arrow points from the text 'Button Bar' below to the 'ADD HOURS' button in the bar.

## **Button Bar**

The “button bar” is at the top of the Contracts Detail page and your gateway to managing Enrollments, Hours Tracking and Invoicing.



# CBT Hours Tracking via Upload (1 of 3)



The screenshot shows the ETP website interface. At the top, there is a navigation bar with a home icon and links for 'CONTRACTS', 'MANAGE USERS', 'ETP WEBSITE', and 'REPORTS'. Below this, there is a section for 'Contract Contract 1' with a document icon. The contract details are as follows:

Account Name	Status	Term Start Date	Term End Date
Account 1	Contract Executed In Progress	12/10/2017	12/12/2019

Below the contract details, there is a navigation menu with the following options: 'ENROLL TRAINEES', 'UPLOAD TRAINEES', 'ADD HOURS', 'UPLOAD HOURS', 'UPLOAD CBT HOURS', and 'UPDATE ROSTERS'. The 'UPLOAD CBT HOURS' option is highlighted with a black box, and a mouse cursor is pointing at it.

- ✓ Ability to upload hours using CSV
- ✓ Replaces requirement to e-mail CBT hours to Cal-E-Force administrators




# CBT Hours Tracking via Upload (2 of 3)

## Upload CBT Hours

Please Upload your CSV file here:  No file chosen

**Note: Please use the standard template to upload Hours data. [Click Here](#) to download the template**




	A	B	C	D	E
1	Trainee Employee ID	Roster Number	Training Date	CBT Class Title	
2					
3					
4					
5					

- ✓ Reduced amount of data required to track hours
- ✓ No Delivery Method or Training Type data needed
- ✓ Roster #s are mandatory
- ✓ Simplified retrievable data pertaining to hours tracking



# CBT Hours Tracking via Upload (2 of 3)

 **Errors**

There are errors while saving these records: The record Number is: 1 :The error is: Trainee\_Date\_Roster\_ID\_\_c not specified

There are errors while saving these records: The record Number is: 2 :The error is: Trainee\_Date\_Roster\_ID\_\_c not specified

**For your reference here is a sample list of Hour Records that are being uploaded**

TRAINEE EMPLOYEE ID	ROSTER NUMBER	TRAINING DATE	CBT CLASS TITLE
TID-28-JP Test	1000011	8/10/2019	Enhancing Productivity
TID-30-Jesse Sanchez	1000011	8/10/2019	Enhancing Productivity
143143-fa la	1000011	8/10/2019	Enhancing Productivity
TID-35-Deepak Hooda	1000011	8/10/2019	Enhancing Productivity
31-Victor Wright	1000011	8/10/2019	Enhancing Productivity

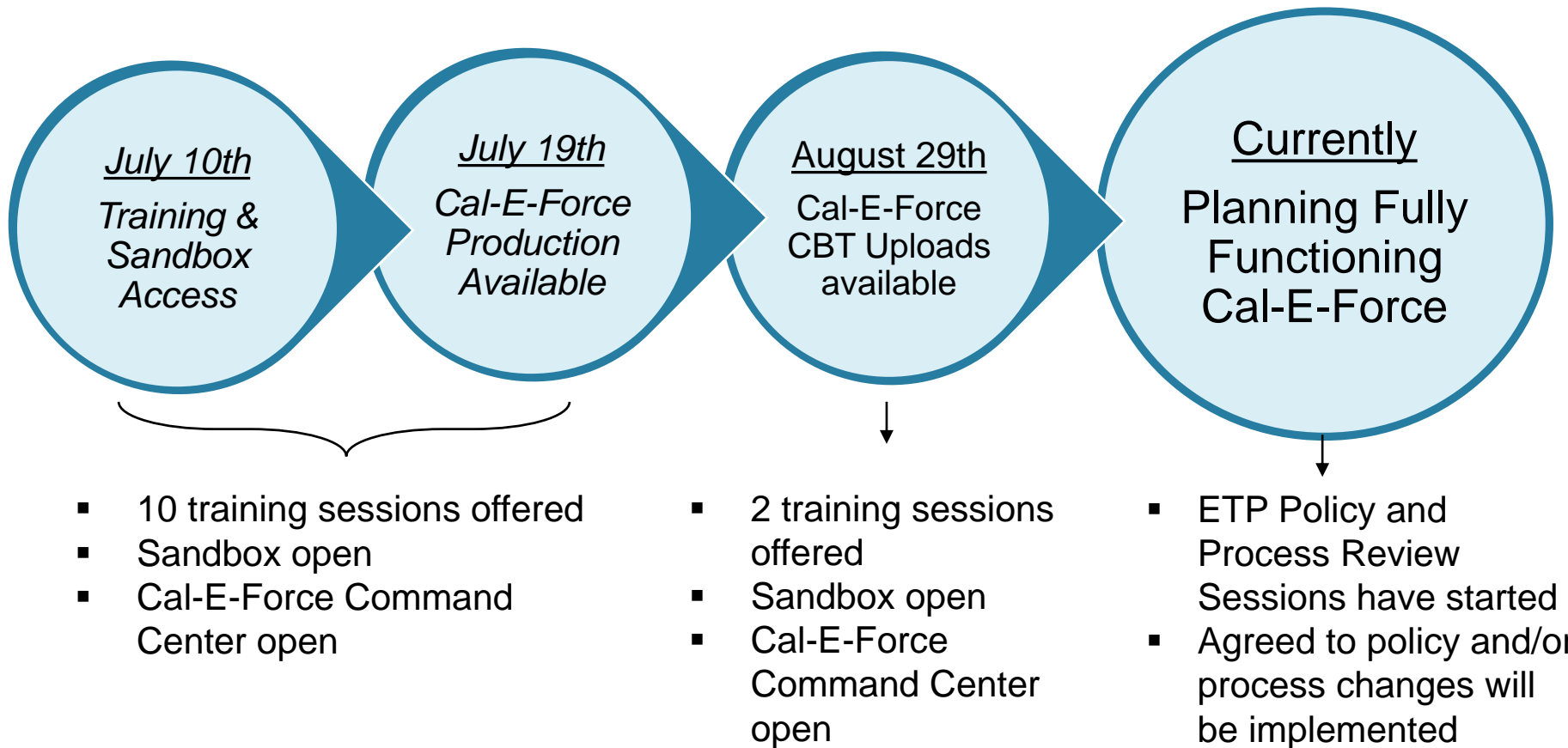
When you are satisfied with the records above, click the Upload CBT Hours button to upload the CBT hour records.

[Upload CBT Hours](#)

- ✓ Partial upload success and error management
- ✓ With roster numbers mandatory, users are able to mass edit and have duplicate detection



# Next Steps




*Keep an eye out for Go Live Communications!*



# Thank you!

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- ❑ Reference Guides & Video Guides posted on the ETP website - [Cal-E-Force General Information](#) section
- ❑ Updates continually posted on the ETP website - [Cal-E-Force News](#) section
- ❑ The Cal-E-Force Command Center is available to assist with questions, comments, etc.

 844-729-2070

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- ❑ Executive Level Contact - Jill McAloon, Chief Deputy Director

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