California Workforce Services Network Project

Employment Training Panel

Employment Training Management System (ETMS)

Customer User Guide

Volume One of Seven Volumes

ETMS Overview, Navigation and Registration

Version *1.0*

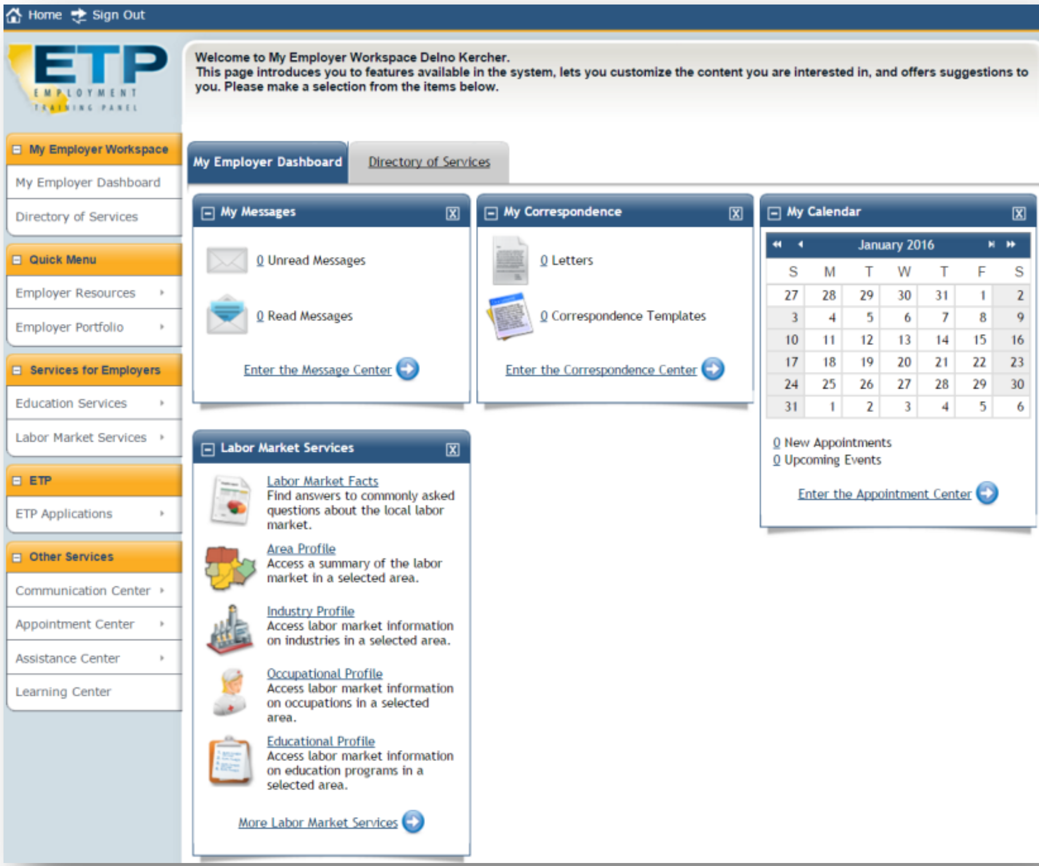
October 2016

Revision History

Revision History			
Revision #	Date of Release	Owner	Summary of Changes
1.0	10/19/2016	GSI - PMO	Initial Release

Volume One (1) Table of Contents

Volume One (1) Introduction



Welcome to the Employment Training Management System (ETMS) Customer Guide (Guide). This Guide is published as seven (7) Volumes and covers the key features of the system. In combination with the customer videos, available on the ETP Website, it provides the needed training and reference materials to support the use of this web-based system. This Volume has three (3) chapters - *Chapter 1 ETMS Overview - Workflow and System Access*, *Chapter 2 My Employer Dashboard and Left Navigation Menu Features*, and *Chapter 3 Employer Registration and Orientation*.

Guide Organization

In the Summary of the ETMS Customer User Volume Table the general contents for each Volume is shown.

Summary of ETMS Customer User Guide

Volume/Chapter Number	Title and Content Focus
Volume One (1)	**Overview, Navigation and Registration**
Chapter One (1)	ETMS Overview - Workflow and System Access
Chapter Two (2)	My Employer Dashboard and Left Navigation Menu Features
Chapter Three (3)	Employer Registration and Orientation

Volume/Chapter Number	Title and Content Focus
Volume Two (2)	**Preliminary Application Submittal**
Chapter Four (4)	Single Employer
Chapter Five (5)	Multiple Employer Contractor
Volume Three (3)	**Application In-Progress**
Chapter Six (6)	Single Employer
Chapter Seven (7)	Multiple Employer Contractor
Chapter Eight (8)	Processing Waivers
Chapter Nine (9)	Certification Process
Volume Four (4)	**Contract Development**
Chapter Ten (10)	Panel Proposal (ETP Staff - View Only)
Chapter Eleven (11)	Contract Processing (ETP Staff - View Only)
Volume Five (5)	**Contract Management and Monitoring**
Chapter Twelve (12)	Contract Management (Includes Revisions)
Chapter Thirteen (13)	Monitoring
Volume Six (6)	**Invoicing and Trainee Hours Tracking**
Chapter Fifteen (14)	Enrollment
Chapter Sixteen (15)	Trainee Hours Tracking
Chapter Seventeen (16)	Invoicing
Volume Seven (7)	**Links to Reference and Help Materials** ▪ Glossary of Terms ▪ Frequently Asked Questions ▪ Quick Reference Guides ▪ Helpful Guide to the ETP Application ▪ Helpful Guide to the Contract Process

The ETMS supports the full life cycle of the ETP preliminary application, application and contract processes. Customer organizations and their representatives (referred to as ***customer*** or ***user*** in this Guide) can determine and define their training needs and the methods to provide that training. This starts with the customer's registration and continues with the on-line Preliminary Application and routed (via submit) to ETP staff. Preliminary Applications are reviewed for program eligibility. Eligible customers will use ETMS to complete the Application In-Progress, followed by staff completing Application Development, Proposal Review, and finally ending with an Executed Contract. Part of the Executed Contract features involve contract management functions, invoicing for and disbursement of funds, contract revisions, and tracking trainees and managing training hours. The customer will enter information regarding training performance and invoicing directly into ETMS, and this information will be used to process payments.

ETMS uses a tabular format designed to capture necessary information by subject area. In Volume One (1) of the Guide, customers learn about ETMS navigation features that allow them to quickly locate the application or contract for view and edit. Using either the Left Navigation Menu or the My Employer Dashboard (Dashboard), customers will click on the Pre-Application(s), Application(s) or Contract(s) Tabs. In Volume Two (2) of the Guide, customers are walked through the process of completing a preliminary application for a Single Employer Contractor a Multiple Employer Contractor.

In Volume Three (3), the customer works with the Application(s) tab. A listing for their Applications will display in a table. The customer will select **View** to continue working on their application submittal. During this phase of the application process when the application is with the customer is called *Application In-Progress*. When the Application In-Progress is submitted, the status will be changed to Application Development. At this point, ETP staff will begin their processing steps.

In Volumes Four (4) through Six (6), users are provided information on finalizing the application, obtaining Panel approval via the Panel Proposal and then generating the ETP contract. Once the contract has been issued, the remaining Volumes and Chapters support the actual execution of the customer's training program through hours tracking, invoicing and close out.

For a general overview of the ETMS system and accessing it as an employer, you can also use the training video, ETMS System Overview, available in the ETMS Learning Center or on the ETP Website.

1 ETMS Overview - Workflow and System Access

Chapter Contents

This chapter covers information on the system organization and navigation features. These features and tools are used by customers to quickly locate necessary information about their application(s) and contract(s). Also discussed are the general resource features of ETMS including profile features, accessing the Communication Center for messages from staff, and/or accessing the Learning Center for videos to help employers learn how to use the system.

Note: References are made within the ETMS system and supporting materials to Employers, Contractors, Employer Users, or External Users depending on where the user is at in the system. As necessary please provide the information in these areas that are relative to your role(s). ETP understands that someone other than *employer* might complete the information required throughout the system. These include a Multiple Employer Contractor and/or a representative of the employer.

For a general overview of the ETMS system and principals of navigation in the system as an employer, you can use the following two (2) training videos – ETMS System Overview and How to Navigate in ETMS. Both are available in the ETMS Learning Center and on the ETP Website.

1.1 ETMS Supports ETP Workflow - Registration to Contract

Following is a brief overview of the ETP contracting processes starting with the creation of a Preliminary Application, through Application Development, and ending in an Executed Contract. The system is designed to build on previously submitted, added or amended information. This allows the customer to manage their application and contract, including tracking trainee progress, creating invoices and collecting funds for their training. It also provides a view of completed documents as they are finalized such as the Panel Proposal and the Executed Contract.

General areas in the Guide where the specific work flow is addressed is noted in the parentheses.

- ***Employer Registration & Orientation*** - The process begins when a customer first registers in the ETMS system by setting up a profile and entering contact data. Part of the process is for a user to complete the orientation which includes review of information slides that are in the ETMS system. Completion of the orientation for first time applicants is tracked. ETP staff will receive an email notification of a newly registered customer. Participating Employers in a Multiple Employer Contractor application do not need to complete orientation. (***Referenced in Volume One***)
- ***Preliminary Application*** – Customers will complete a Preliminary Application. There is a requirement that the Preliminary Application be submitted within 90 days of completing the ETP orientation. During the Preliminary Application phase, customers provide basic information about their company and training needs. (***Referenced in Volume Two***)
- ***Eligibility Review*** *(Staff Only)* – Staff reviews the Preliminary Application and makes a determination as to whether the company is eligible to participate in the ETP program. Staff adds data, i.e. funding codes and office assignment information during this process. (***Referenced in Volume Two***)
- ***Site Review*** *(Staff Only)* –ETP Regional Office staff reviews the Preliminary Application. Staff can approve the Preliminary Application in ETMS. (***Referenced in Volume Two***)
- ***Application In-Progress*** – Customers complete the Application In-Progress by adding information to the previously submitted Preliminary Application details. The additional information includes possible additional funding sources, contract questionnaires, and training details. Multiple Employer Contractor proposals identify estimated Participating Employers at this point. (***Referenced in Volume Three***)
- ***Application Development*** *(Staff Only)* – In conjunction with the customer, ETP development staff reviews and/or edits the application. (***Referenced in Volume Three***)
- ***Proposal Review*** *(Staff Only)* – Materials are prepared for submittal to the Panel. The final product is a Panel Proposal package that can be printed. The Proposal will be presented at the selected Panel meeting that occurs on a monthly basis or will be processed and approved via ETP Delegation Order. The Panel will approve or deny a project. (***Referenced in Volume Three***)
- ***Contract Executed*** – Materials are compiled and a contract is generated. At this point, customers can enroll trainees; track training hours, and utilize other functions of the system during the life of the contract. Invoices can be created. The system will generate invoice data based on the total number of tracked training hours per trainee. Contract Revisions can be processed and tracked within the overall contract record. ETP staff monitors

progress of the contract through its term. (***Referenced in Volumes Four, Five, Six and Seven***)

- ***Contract Completed*** (*Staff Only*) – To close out the contract, staff verify that the customer met the training requirements. Once verified, a closeout invoice is processed. (***Referenced in Volume Five***)

1.1.1 Version Numbers, Statuses and Phases

So that ETMS users can track the application and contract, the system has specific version numbers related to eight (8) statuses. Each is grouped into one of three (3) processing phases as shown in the *Relationship of Version Numbers, Status and Processing Phases* Table.

Relationship of Version Numbers, Status and Processing Phases

Preliminary Application	Application	Contract
Ver. 1 - Preliminary Application	Ver. 4 - Application In-Progress	Ver. 7 - Contract Executed
Ver. 2 - Eligibility Review	Ver. 5 - Application Development	Ver. 8 - Contract Complete
Ver. 3 - Site Review	Ver. 6 - Panel Proposal	

Information needed to develop a training program will be provided in Versions 1.0 – Pre-Application, Version 4.0 – Application In-Progress, and Version 7.0 – Contract Executed as shown in the *List of ETMS Version Numbers and Status Names* Screenshot. Highlighted in blue at the areas where customers will provide information.

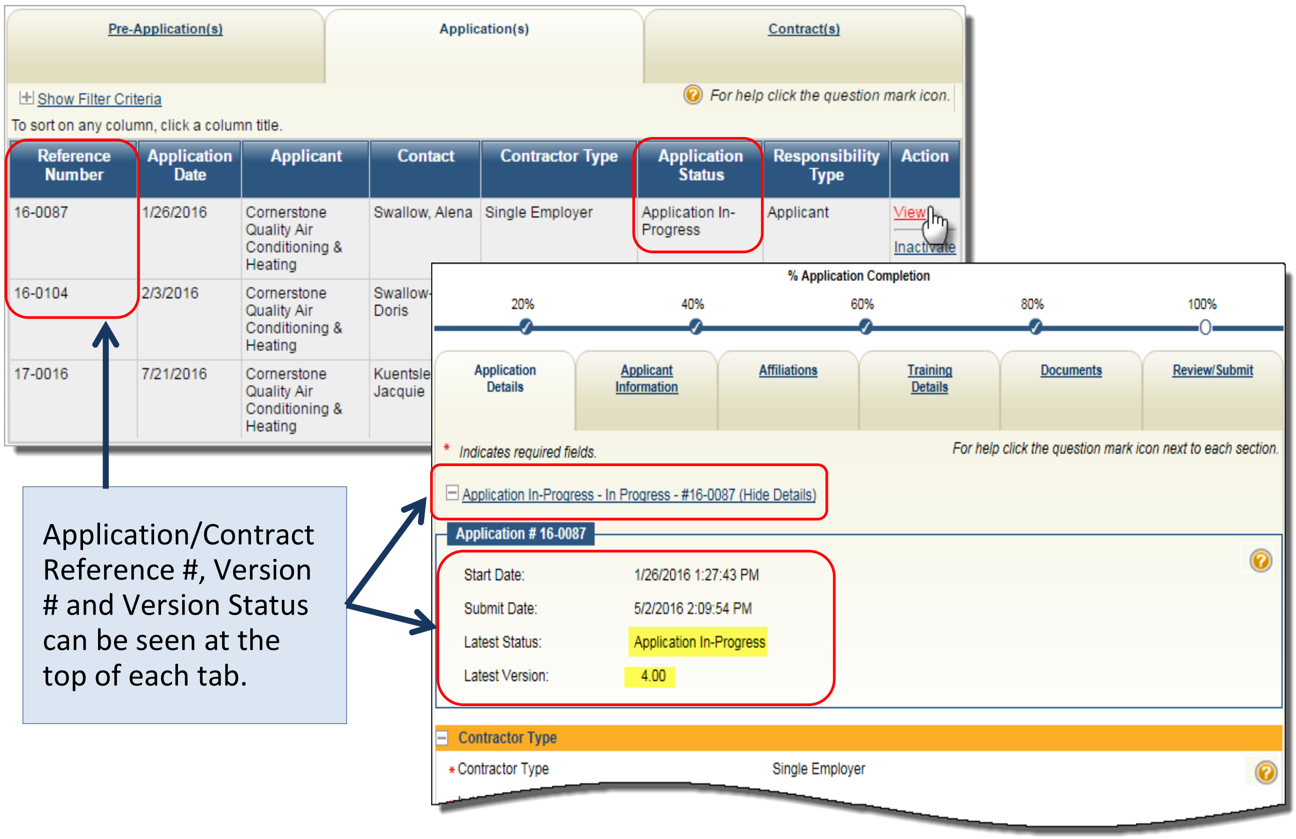
List of ETMS Version Numbers and Status Names

The customers' screens are only active in these versions. The other versions' screens support staff reviews, analysis and development processes. During these versions, ETMS screens will be view-only for customers. This means that customers will make edits and submit records at three points in the overall workflow process. These phases, version numbers, and status names map to the basic ETP workflow that is supported by ETMS, which was briefly described above.

1.1.2 *ETMS Specific Reference Points*

Reference points for ETMS users are an important navigation tool within the system. The use of these reference points is illustrated in the *ETMS Reference Point Examples* Screenshot.

ETMS Reference Point Examples

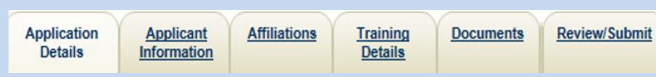
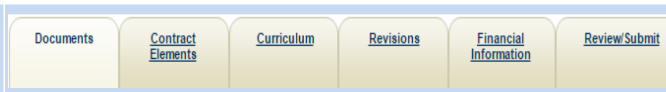


As indicated, links are available in the status grids, folder organization, and many other places within the system, relative to one (1) the current application or contract; and two (2) the status of the specific application or contract.

1.1.3 Decision Options Supported by ETMS

The *Decision Options by Application Phases and Status* Table shows the decision options that are supported and/or stored in ETMS. The decisions with an asterisk indicate that the application will progress to the next status.

Decision Options by Application Phases and Status

Application Status (Version)	Decisions	Associated Tabs
	Preliminary Application Phase	
Preliminary Application *Version 1.00*	▪ In Progress ▪ Submit	
Eligibility Review *Version2.00*	▪ In Progress ▪ Approved * ▪ Denied	Staff Only
Site Review *Version 3.00*	▪ In Progress ▪ Open Application * ▪ Re-eligibility * ▪ Denied	Staff Only (If the decision type is “Denied” or “Re-Eligibility” the employer may be contacted for further information.)
	Application Phase	
Application In-Progress *Version 4.00*	▪ In Progress ▪ Submit	
Application Development *Version 5*	▪ In Progress ▪ Approved * ▪ Re-eligibility	Staff Only
Proposal Review *Version 6.00*	▪ In Progress ▪ Panel Approved * ▪ Panel Amended * ▪ Contract In Progress * ▪ Denied	Staff Only (If the decision type is “Denied” or “Re-Eligibility” the employer may be contacted for further information.)
	Contract Phase	
Contract Execute *Version 7*	▪ In Progress ▪ Completed *	
Contract Complete *Version 8*	n/a	Staff Only

1.2 ETMS Customer Access and Employer Accounts

To access ETMS, a customer completes the Registration Process. Customers provide information needed to set up an account, consistent with most web-based systems.

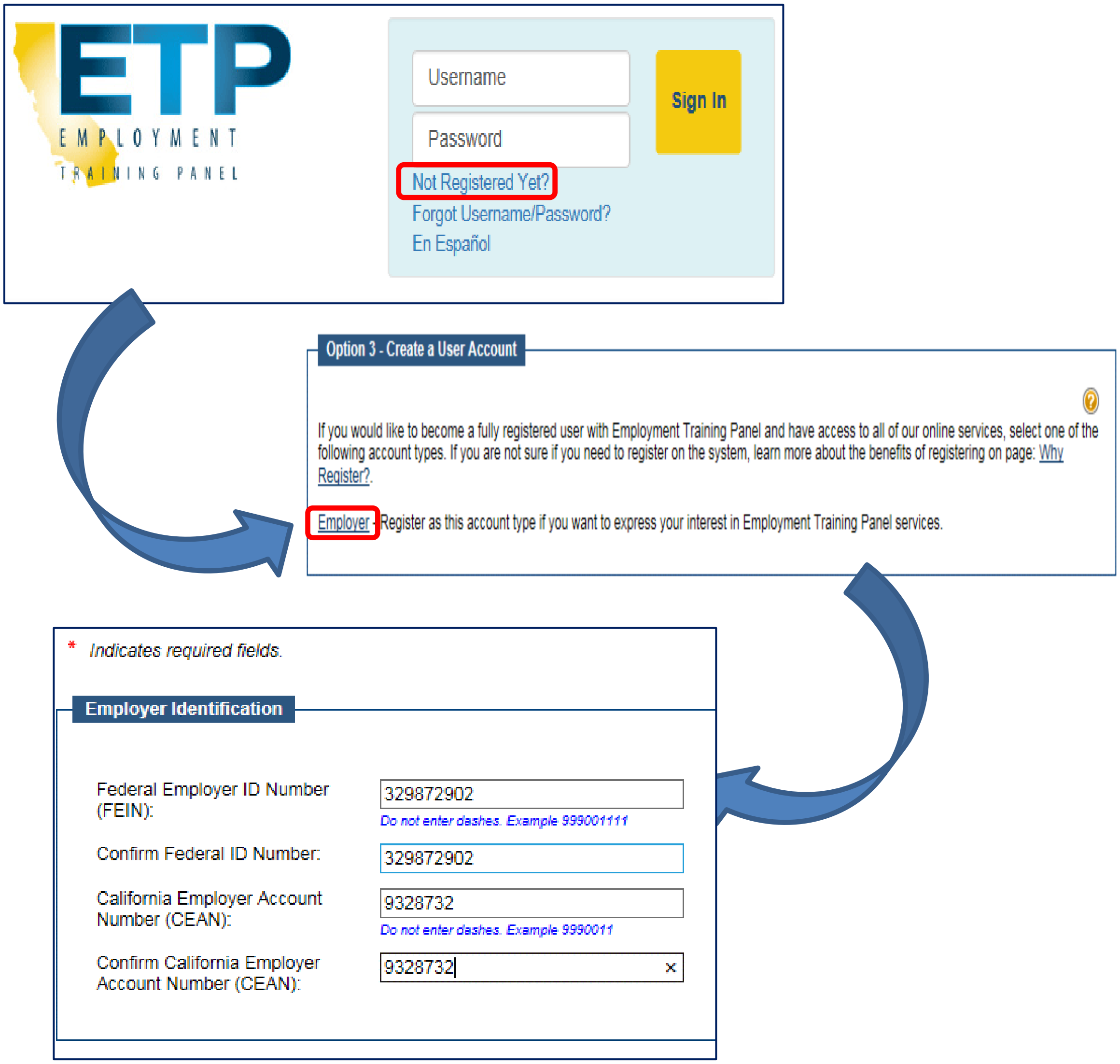
Provided within the ETMS system is a Home or Splash Page, as illustrated in the *ETMS Splash Page* Screenshot. If you are on this Page, then you are on the right web link.

ETMS Splash Page

1.2.1 User Registration

If you are a new customer to ETMS, the starting point for access is the Registration Process. Click the **Not Registered Yet?** link on the Home Page. Then click on the **Employer** link to start creating a customer account, as illustrated in the *ETP Home Page > Create New Employer User Link* Screenshot.

ETP Home Page > Create New Employer User Link



The full process for a customer to Register is covered *in* Chapter 3 *in this* Volume of the Guide.

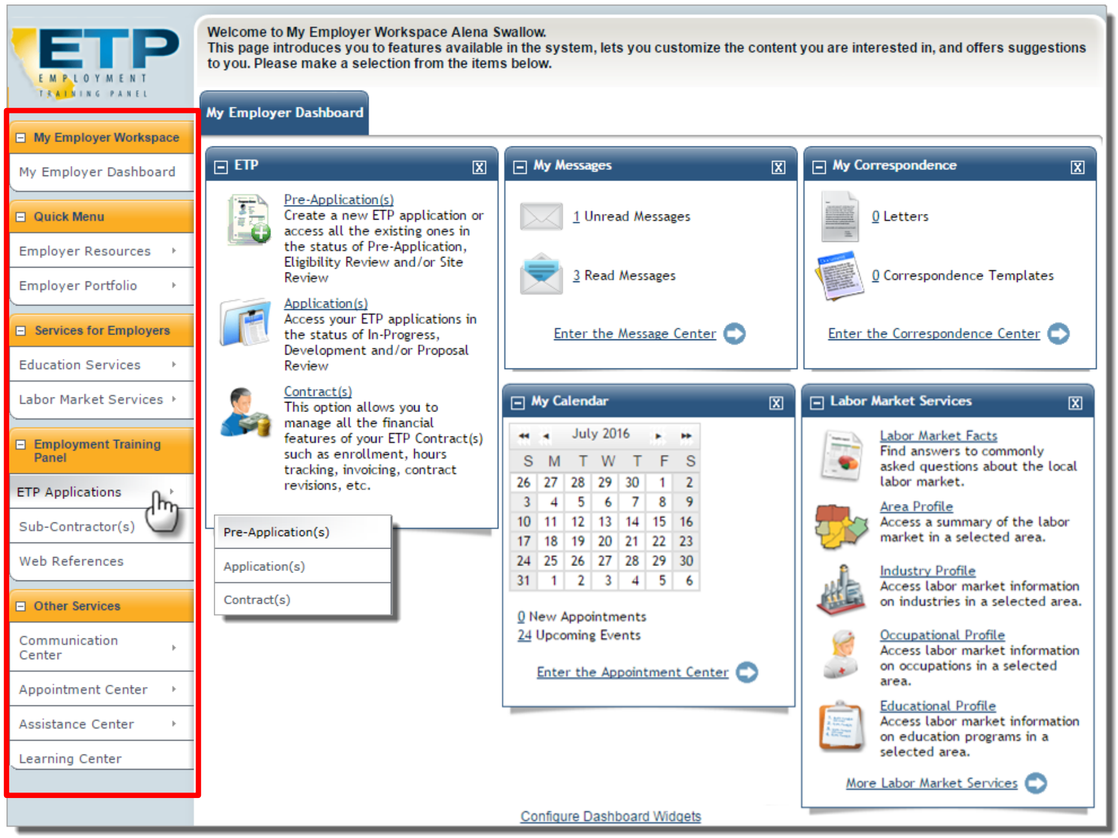
1.2.2 Navigation Features

Once the user has Registered and each time they return to the ETMS, two (2) primary navigation features of the system will be available. These are the Left Navigation Menu and the My Employer Dashboard areas, which are available on the login page.

The Left Navigation Menu will display on each page of the system, allowing the user to move from one area of the system to the next. The current *ETMS Navigation Features* Screenshot reflects five (5) major system areas that the customer can access from anywhere in the system.

The My Employer Dashboard (Dashboard) also provides access to five (5) system features or tools. The Dashboard page is available at each login and allows users to quickly see status information, determine if they have messages, and so forth, as illustrated in the *ETMS Navigation Features* Screenshot.

ETMS Navigation Features



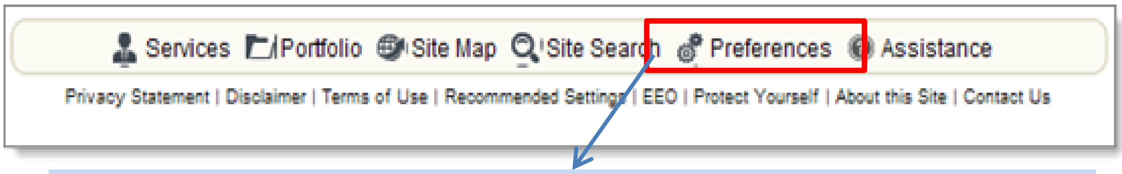
Customers can customize the look of these navigation tools. How to customize the Left Navigation Menu and the My Employer Dashboard is covered in *Chapter 2 -- My Employer Workspace & Left Navigation Menu Features* in this Volume of *the Guide*.

1.2.2.1 Using the Footer Toolbar

The Footer Toolbar as shown here in the *ETMS Footer Toolbar* Screenshot appears at the bottom of the main system screens. It displays key words that are quick links to system documents and organization.

From the Footer, a user can search the site, access services and customize the navigation features.

ETMS Footer Toolbar



Selecting Preferences allows users to rearrange the menu groups based on their needs. The second row has active links to standard information such as Privacy Statements and Terms of Use.

The Footer Toolbar links are described here:

- ***Services*** – Returns to the Services for Employers Directory that is part of the My Employer Dashboard.
- ***Portfolio*** – Opens the Employer Services Options through the Employer Portfolio folders, when assisting an individual or an employer.
- ***Site Map*** – Displays a listing of categories, sub-categories, and serves as a guide to the site.
- **Site Search** – Opens a search page that allows a user to search this site for information. You can perform a search using a variety of keyword combinations using multiple search criteria. You can search through content on the site, as well as tasks you can perform on the site (such as an Application Process).
- **Preferences** – Opens a separate window from which you can change your system default settings for display screens in the system. This includes your view of Themes, Languages, fly-outs in the Left Navigation Menu, as well as which menu groups appear, and in what order.

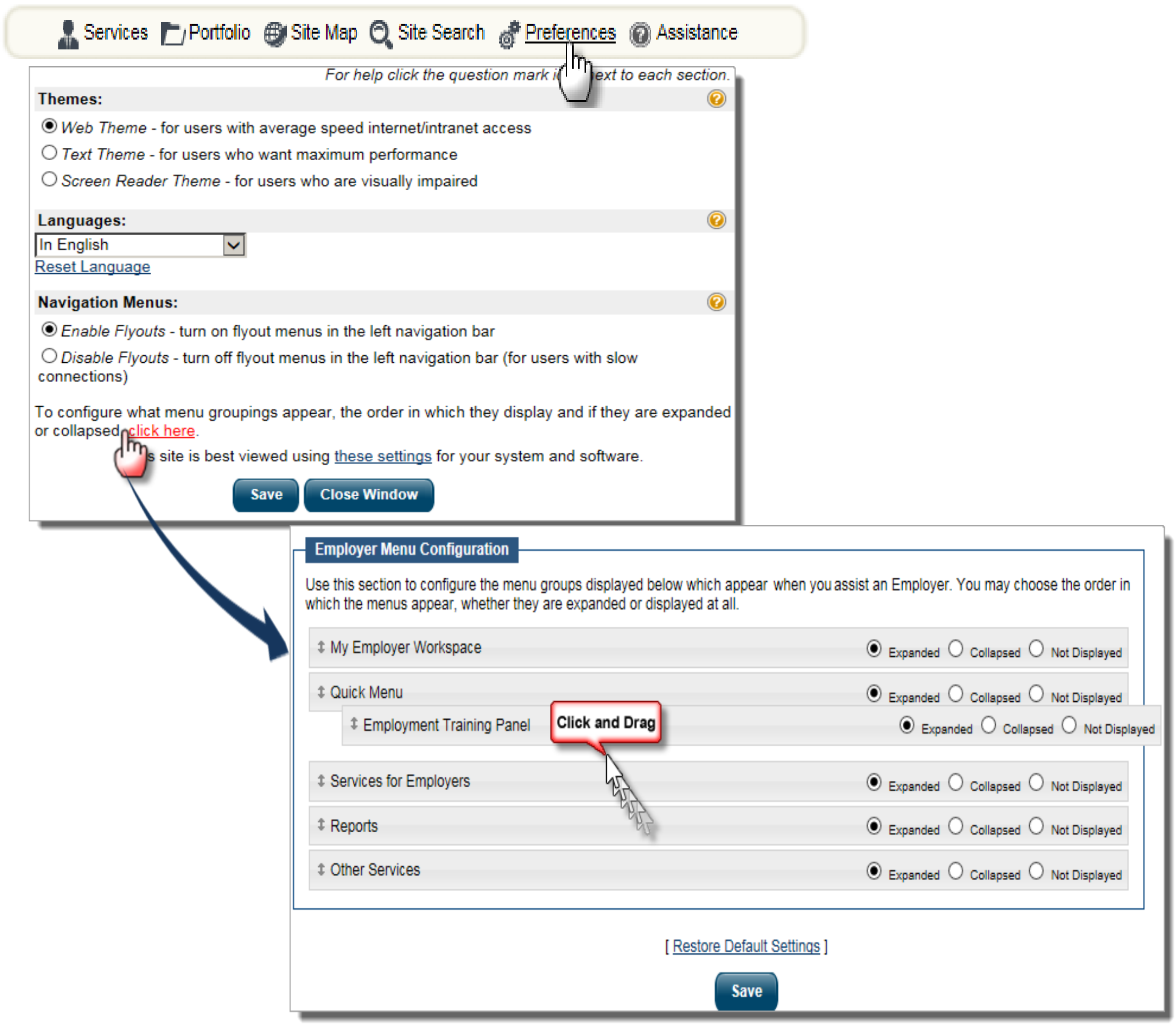
1.2.2.2 Footer Toolbar - Preferences Option

The Preferences option provides the ability to open a Menu Configuration Screen to define which Left Navigation Menu groups are expanded or collapsed, or in what order the groups are displayed.

You can reconfigure the My Employer Workspace tool bar at any time.

The *Preferences Page and Menu Configuration Preferences* Screenshot indicates how a user can make the changes.

Preferences Page and Menu Configuration Preferences



To change the order of your menu layout:

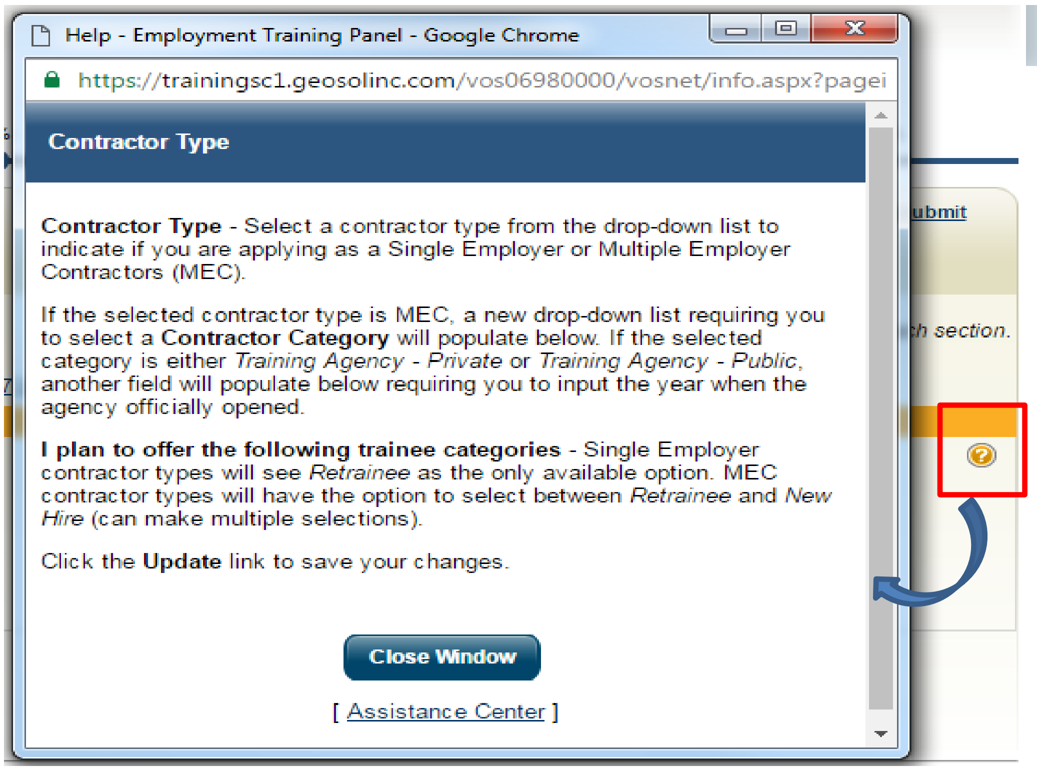
- Select the **Preferences** link.
- Select the **Click Here** link.
- From the Employer Menu Configuration screen:
    - ✓ Click and hold on the **menu groups** roles the drag and drop them in the order you prefer to see them on the Left Navigation Menu.
    - ✓ Click **Save** to return to the My Employer Dashboard.
    - ✓ The adjusted navigation menu will be available.

Additional detailed information on the configuration of system navigation tools is provided in *Chapter 2 My Employer Dashboard and Left Navigation Menu Features* of this Volume of the Guide.

1.2.3 Help Bubbles

As part of the system, ETMS has positioned help bubbles throughout the screens. Provided in the *Help Bubble Sample* Screenshot, is an example of the help bubble text. This is accessed anywhere in the system by clicking on the **Question Mark**.

Help Bubble Sample



1.2.4 Search Companies, Address and Contact

ETMS uses search and update features throughout the system, including master lists of companies and contracts from which to search.

A quick reference guide and customer video on search functions is available as part of *Volume Seven (7) Links to Reference and Help Materials*.

2 My Employer Dashboard and Left Navigation Menu Features

Chapter Contents

This Chapter contains information on My Employer Dashboard (Dashboard) available at login. Also covered are the specific features of the Left Navigation Menu.

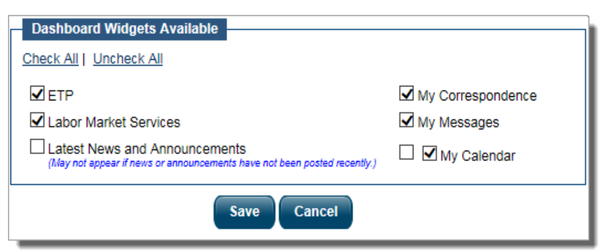
Both the Dashboard and the Left Navigation Menu are initially presented to each new user in an *initial* format. Users can reconfigure these navigation tools to meet their specific needs. If the user wants less views of summary data, it is easily done by removing specific widgets. [1]

It is understood that some of the ETMS Widgets are not specific to the ETP, but more appropriate for Workforce Services users. Widgets can be eliminated when the user is customizing their navigation tools. Customizing these tools is covered in this Volume Chapter of the Guide.

2.1 Workspace ▸ My Employer Dashboard

The ETMS Dashboard is a quick way for customers to view the most frequently accessed training Pre-Applications, Applications, and Contracts information. The Dashboard acts as the user's home page and provides access to system options and functions. An initial format of the Dashboard will be configured with basic widgets to access the five (5) commonly used customer functions. For example:

- The ETP Widget links to Applications or Contracts assigned to the customer



[1] Widgets are a web-based programming tool. Widgets can include icons, pull-down menus, buttons, selection boxes, progress indicators, on-off checkmarks, scroll bars, windows, window edges, toggle buttons, form, and many other devices for displaying information and for inviting, accepting, and responding to user actions.

- The My Messages Widget lists how many messages are read or unread in the message center

2.1.1 Configure Your Widgets

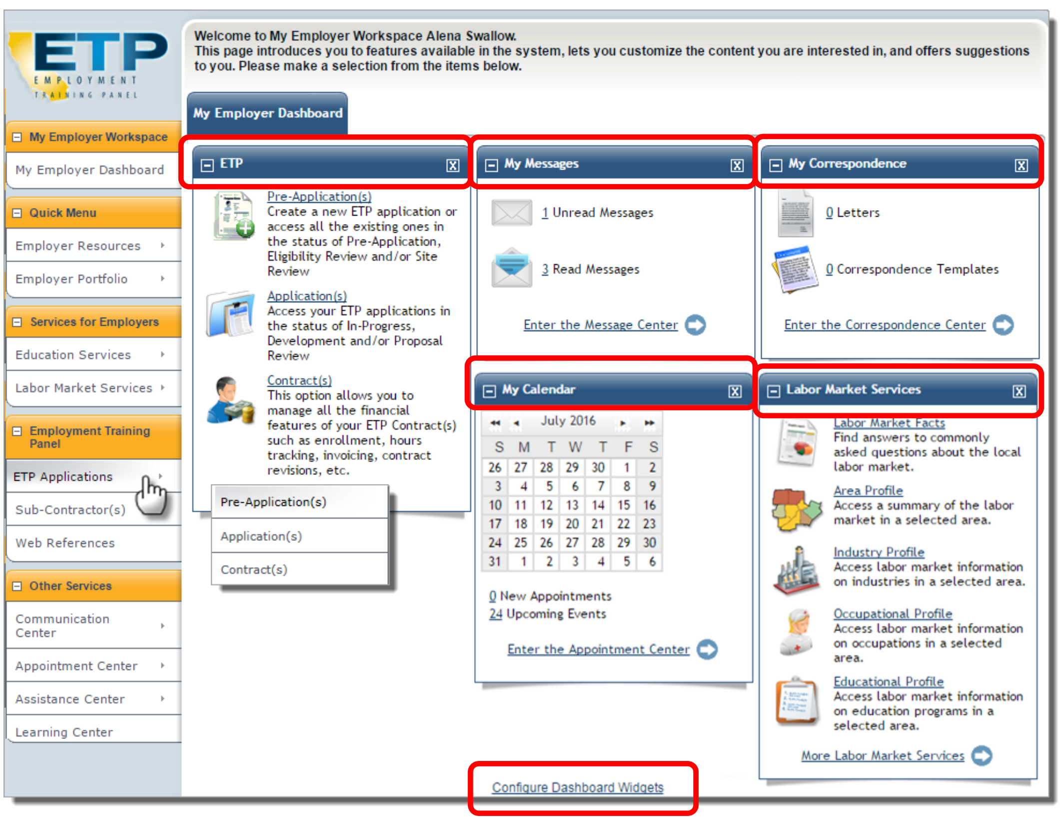
Each user can customize the look of their Dashboard by moving widgets around within the Dashboard space or eliminating (hiding) the widget completely. For example, if you frequently use the *My Messages* Widget, you can place the *My Messages* Widget at the top. If you do not access information about the widget subject, you might choose to move that widget further down on your screen so that other widgets are visible.

You can rearrange the placement of widgets whenever you want by:

- Clicking the minus sign (**-**) at the top left of each widget to minimize it.
- Clicking the **X** at the top right corner of each widget to close and remove it from the screen.
- Clicking in the title bar of each widget and hold it (displaying the move symbol), to move it to another location on the dashboard.

Provided in the *How to Configure ETMS Dashboard* Screenshot is where you would find features.

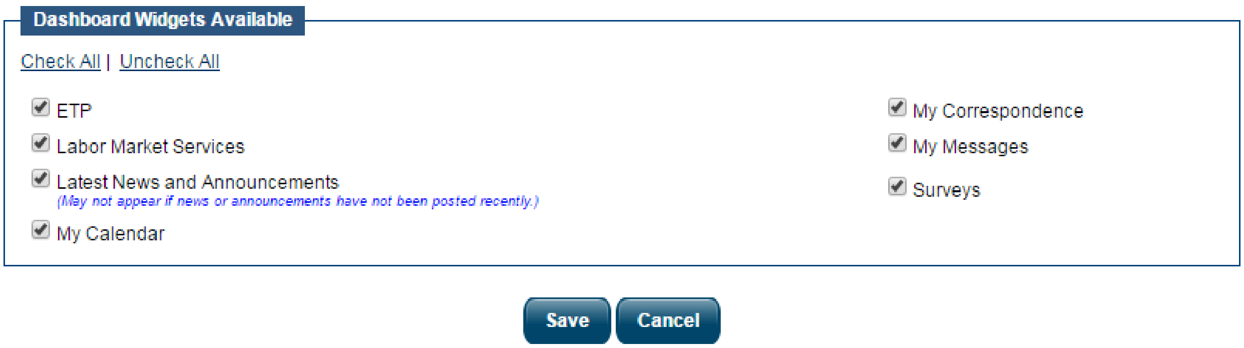
How to Configure ETMS Dashboard



Highlighted in the *How to Configure ETMS Dashboard Screenshot* is the link to configure and/or restore dashboard widgets. Scroll to the bottom of the dashboard page and click the **Configure Dashboard Widgets** link.

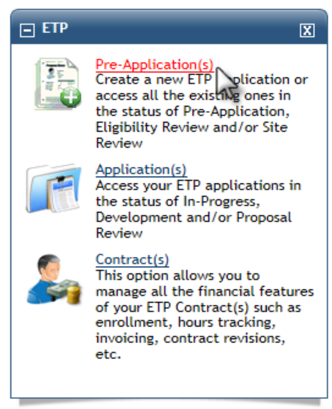
Once on the Dashboard Widgets Available Screen, users can <u>Check</u> or <u>Uncheck</u> **Widgets** they wish to display or turn off, shown in in the *Dashboard Widget Screen* Screenshot.

Dashboard Widget Screen



In addition to expanding or collapsing dashboard widgets, users can also expand or collapse groups on the Left Navigation Menu, move menu groups, and save their menu preferences.

2.1.2 *ETP Widget*



The ETP Widget is a quick way for customer to identify and access Pre-Applications(s), Application(s) and Contract(s). By <u>clicking</u> on the **underlined title**, the user will be taken to the main page for that phase area.

As will be apparent in this Guide, standard screen and layout structures are used to display information.

At the highest level, ETMS is organized as a series of tabs or folders and then organized by working sections or tabs within each tab. Within the tables and working areas, consistent presentation of information is used. For example, Application Status will apply to both the Pre-Application and the Application.

2.1.2.1 Pre- Application(s) Tab

Selection of the Pre-Application(s) tab, allows the user to see their Preliminary Applications listed for that customer. As highlighted in the *ETP Widget – Pre-Application(s)* Screenshot, users will know this by referring to the tab header and the Application Status column of the summary grid.

From here, the user can <u>click</u> **View** to open to screens of additional details. From this same page, the customer could also <u>click</u> **Submit a New ETP Application** button to submit a New ETP Application.

ETP Widget – Pre-Application(s)

2.1.2.2 Application(s) Tab

By selecting the Application(s) quick link, the user will be taken to the Application(s) tab, which lists their Applications In-Progress. As highlighted in the *ETP Widget – Application(s)* Screenshot, users will know this by referring to the tab header and the Application Status column of the summary grid.

Notice that the grid columns for both the Pre-Application(s) and the Application(s) are the same. The Reference Number, Application Date, Applicant, Contact and Contractor Type remain consistent. The Application Status and Responsibility Type are the only two items that will change. If the customer has changed their Primary Contact, this field will reflect the current primary contact. As with Pre-Application(s), by using the links in the Action column, the user will be taken to the details of a specific Application In-Progress and allowed to add and/or modify information.

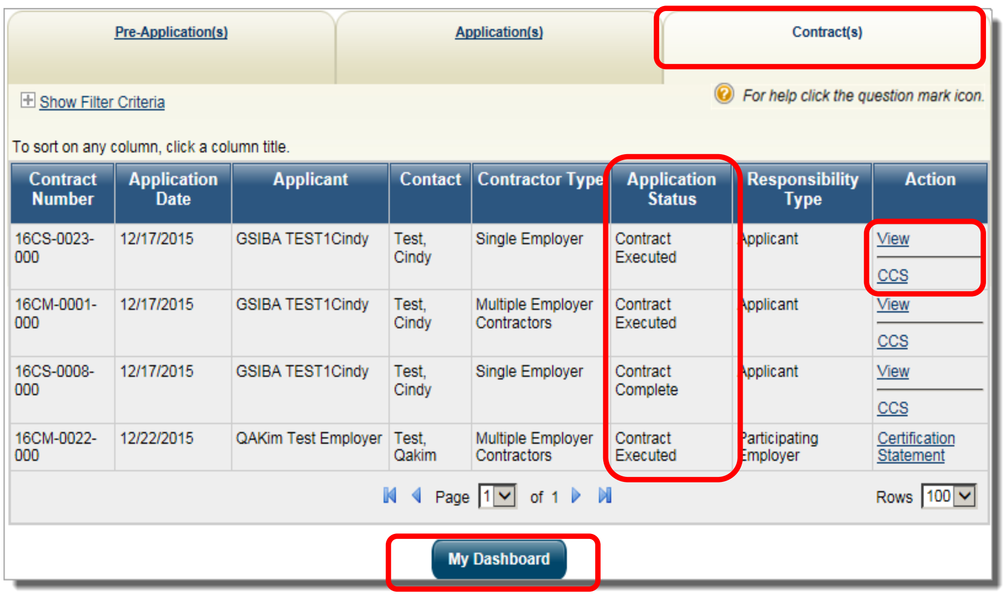
ETP Widget –Application(s)

From this page, customers can view those in Application Development (in view-only mode), while staff prepare the Application for the Panel submittal.

2.1.2.3 Contract(s) Tab

The Contract(s) table allows the user to view a list of their contracts. As highlighted in the *ETP Widget – Contract(s)* Screenshot, users will know this by referring to the tab header and the Application Status column of the summary grid.

ETP Widget – Contract(s)



The customer can view the details of both the Contract and the specific Contract Cost Structure, referred to as CCS, highlighted in the screenshot. Users can also view Contracts that are complete, as noted in the Application Status column. This will be in view-only mode once staff has closed out the contract.

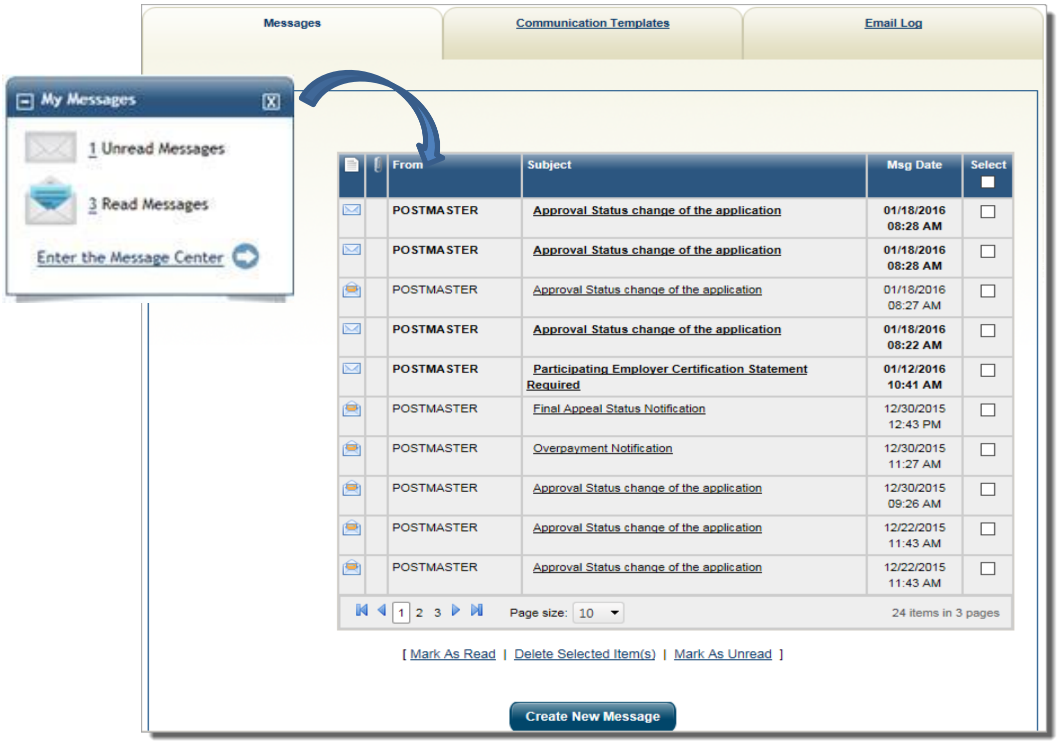
2.1.3 My Messages Widget

The My Message Widget is a quick way to view the number of unread and read messages that you have within the Message Center, and to access those messages.

By <u>clicking</u> on **Enter the Message Center**, users will access their unique Message Center. The system lets users view and delete messages to and from other staff, employers and/or other users of the system.

The Message Center lists the users' received system alerts as shown in the *Employer Messages Center* Screenshot.

Employer Messages Center



The following is a list of some of the navigation, selection, and action controls you use from the Messages list.

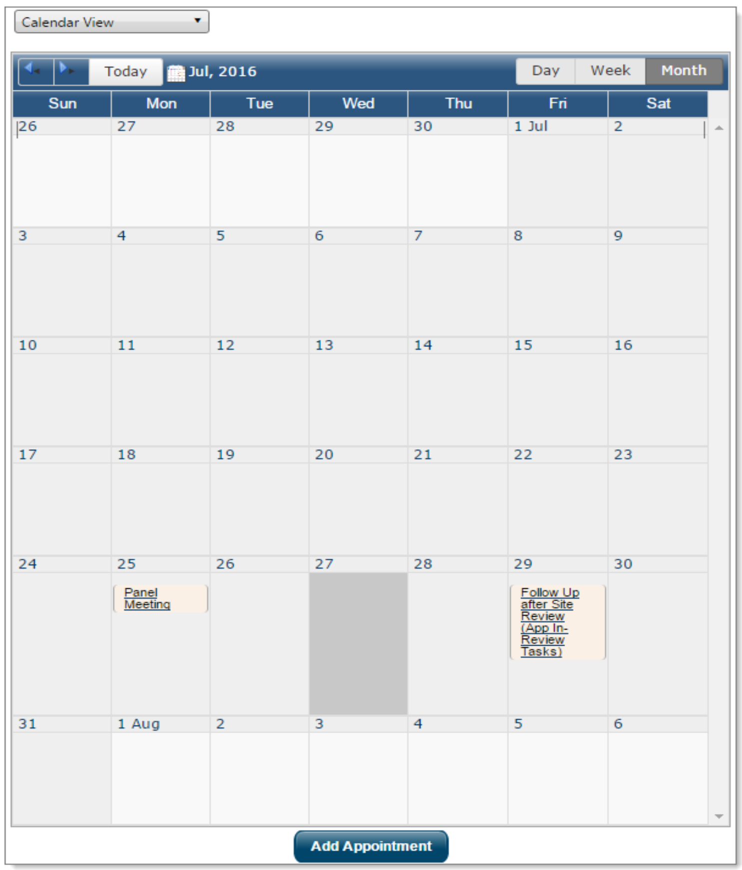
- Folder Tree: A navigation panel on the left side displays the folders that hold messages and mail. Folder options include:
  - ✓ Inbox Folder – Organizes messages users have received and that are currently active.
  - ✓ When a user has not opened and/or read a message, a closed envelope displays.
  - ✓ When a user has opened and/or read a message, an open envelope displays.
  - ✓ Deleted Folder – Displays messages that the user has received and deleted from their inbox.
  - ✓ Drafts Folder – Messages that the user has created, but has not sent.
  - ✓ Junk Folder – Holds messages that the system has sorted away from the inbox. These messages may be suspicious or "junk" mail.
  - ✓ Sent – Displays messages that user has sent.
- Msg Date: Allows user to filter how far back to see messages.
- Page: Allows user to go to a specific page in the list of messages.
- Rows: Allows user to set how many messages display per page.
- Delete: Allows user to check boxes next to the messages and click the **Delete Selected Item(s)** link (in all but Deleted view).

2.1.4 My Calendar Widget

The My Calendar Widget is a quick way for the customer to view the number of new appointments and upcoming events. The Widget lets the customer access the screens or options for the Appointment Center identically to the schedules options for the Appointment Calendar or the Employer Appointments (that are available under Employer Resources). In the Widget shown to the right select **Enter the Appointment Center**.

A calendar displays the current month's appointments as shown in the *Appointments Calendar Screen* Screenshot.

Appointments Calendar Screen

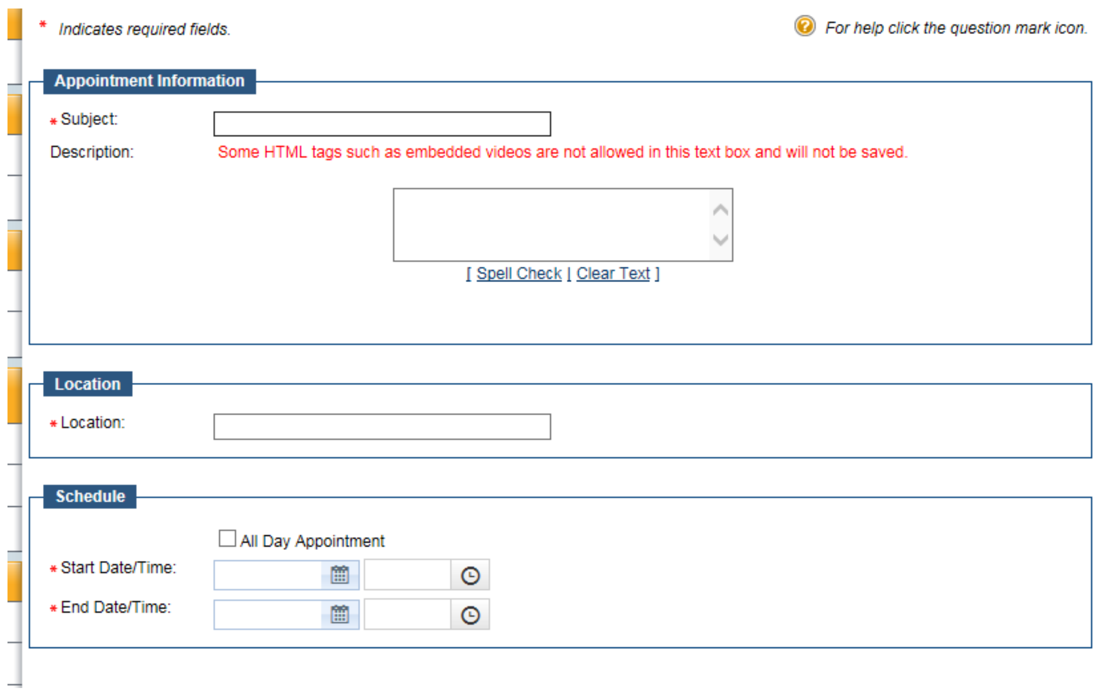


From the calendar, users can:

- Use controls on the top of the calendar to move to calendar pages for different months/years.
- Use the drop-down in the upper left corner to select a **Detailed List View** (rather than a Calendar View) in order to display your appointments as a list similar in function to the Message List screen.
- Click on an **Appointment** to open an Appointment Details screen for that appointment.

The *Appointment Details* screen as seen in the Screenshot below is similar to a completed Add Appointment screen, except for the person viewing the appointment, when the appointment takes place, it will determine if any controls are still active the screen.

Appointment Details



2.1.5 *Labor Market Services Widget*

The Labor Market Services Widget includes quick links for accessing each of the major types of Labor Market Information (LMI) including Area, Industry, Occupation, and Education Profiles. The Widget includes a link to the Labor Market Facts, which answers some of the most frequently asked questions about the labor market for the customer's area, desired occupation, or the associated general industry data.

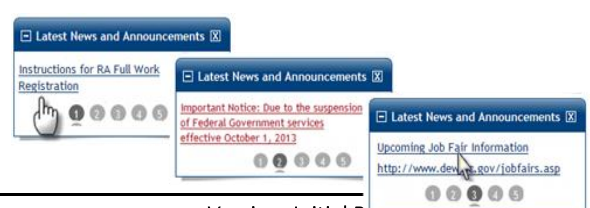
This is a Widget that many ETP users might want to suppress from the customized Dashboard, as this does not directly apply to the ETP program.

2.1.6 *My Correspondence Widget*

This Dashboard Widget is a quick way to view the number of letters and correspondence templates that you have created, and access screens to manage the letters or correspondence templates.

2.1.7 *Latest News and Announcements Widget*

The Latest News and Announcements Widget is a small rolling-update area that displays timely information



controlled through Content Management. ETP will use this feature to inform ETMS users about news items, announcements, or cautions unique to the system.

Each message can contain links to internal and external content. When news or announcements have not been posted recently, the Widget will not be shown on the dashboard.

The current sample shows how Workforce Services organizations typically display important information. This Widget will be updated by ETP with their own information.

2.2 Left Navigation Menu ▸ Employer Resources

The Left Navigation Menu provides the primary navigation tool for users to maneuver themselves from anywhere in the system. This section contains information on the various subject groups available. Information is also provided on how to customize the Left Navigation Menu.

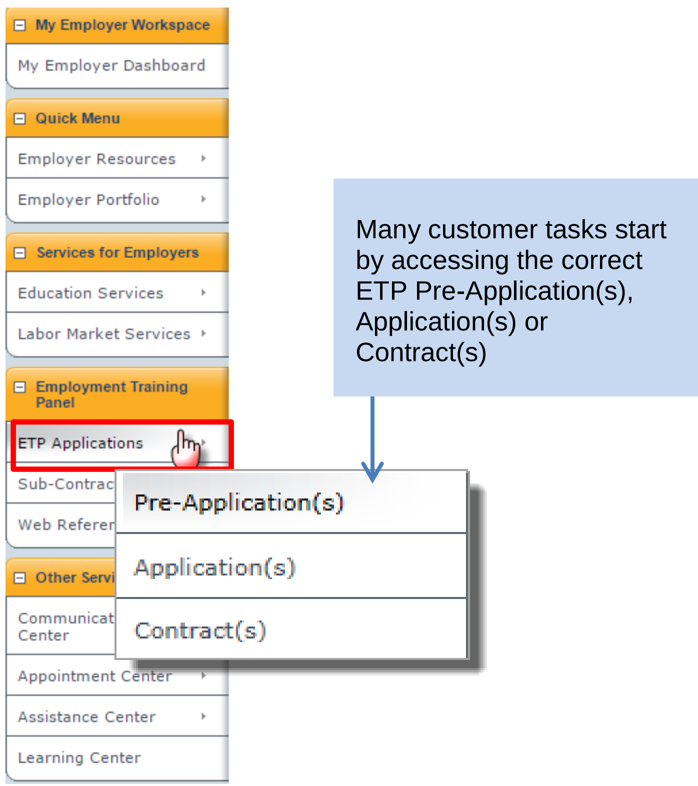
At any point in time, users can modify both the Left Navigation Menu links. Users can adjust the top-down sequence and collapsed/expanded defaults of the left navigation menu. Therefore, the sequence and options displayed in the menu may differ for your specific user login.

This ability to change the order of menu options is available through the Preferences link in the Footer Toolbar. This process is covered in *Chapter 1, Section 1.2.2.2 - Footer Toolbar - Preferences Option* of this Volume of the Guide.

2.2.1 Fly-out Features

A key element of the Left Navigation Menu is the fly-out feature. This allows the menu to be expanded providing access to service options. The *Left Navigation Menu – Fly Out Options* Screenshot displays a fly-out for ETP Applications (which is often the quickest way to select the Preliminary Application, Application, or Contract). To use the fly-out options of the Left Navigation Menu, hover over the item and the system will display a fly-out menu. Click any of the options in the fly-out menu to navigate to the screen.

Left Navigation Menu – Fly Out Options



Note: As the Left Navigation Menu is a standard feature of the Virtual OneStop System, some quick navigation features may not provide applicability to many ETP users. Therefore, ETP customers that will be routinely working on ETP Applications may want to minimize the Quick Menu group and other Left Navigation Menu groups, to focus on the Employment Training Panel items. The standard "generic" view allows for you the option to keep these groups.

2.2.2 Quick Menu Selections

The *Quick Menu Selections* can be a simpler way to access some of the communication and appointment options. It consists of two (2) areas – *Employer Resources* and *Employer Portfolio.*

2.2.2.1 Employers Resources Menu

The Employer Resources Menu item provides quick links to some frequently used areas related to messages, appointments, and events as shown in the *Employers Resources Links* Screenshot.

Employers Resources Links

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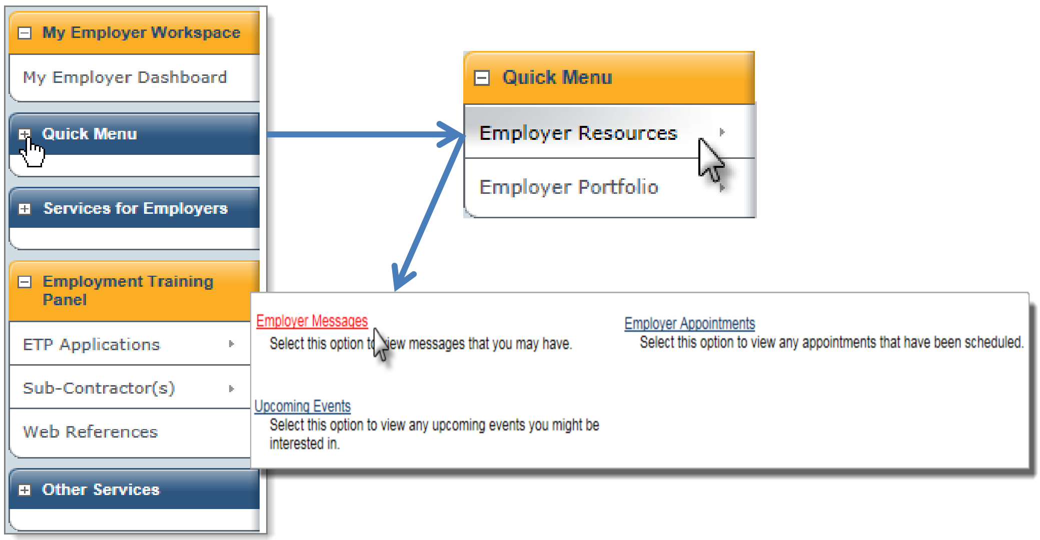
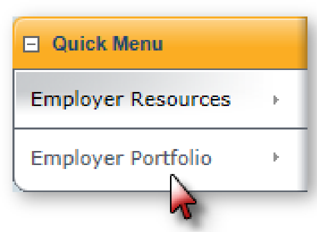


Users may choose from the following *My Staff Resources* options:

- **Employer Messages** – Communicate with other staff, employers, subcontractors or individual users. User will receive message alerts, if applicable.
- **Employer Appointments** – View and manage appointments set with individuals, employers, or other ETP staff.
- **Upcoming Events** – View and manage scheduled ETP events that may include Panel Meetings. At this time, there are no plans by ETP to use this system feature. Additional instructions will be provided for customers, if this feature will be used in ETMS.

These options are also available via dashboard widgets as discussed in *Section 2.1 Workspace My Employer Dashboard* above.

2.2.2.2 Employer Portfolio

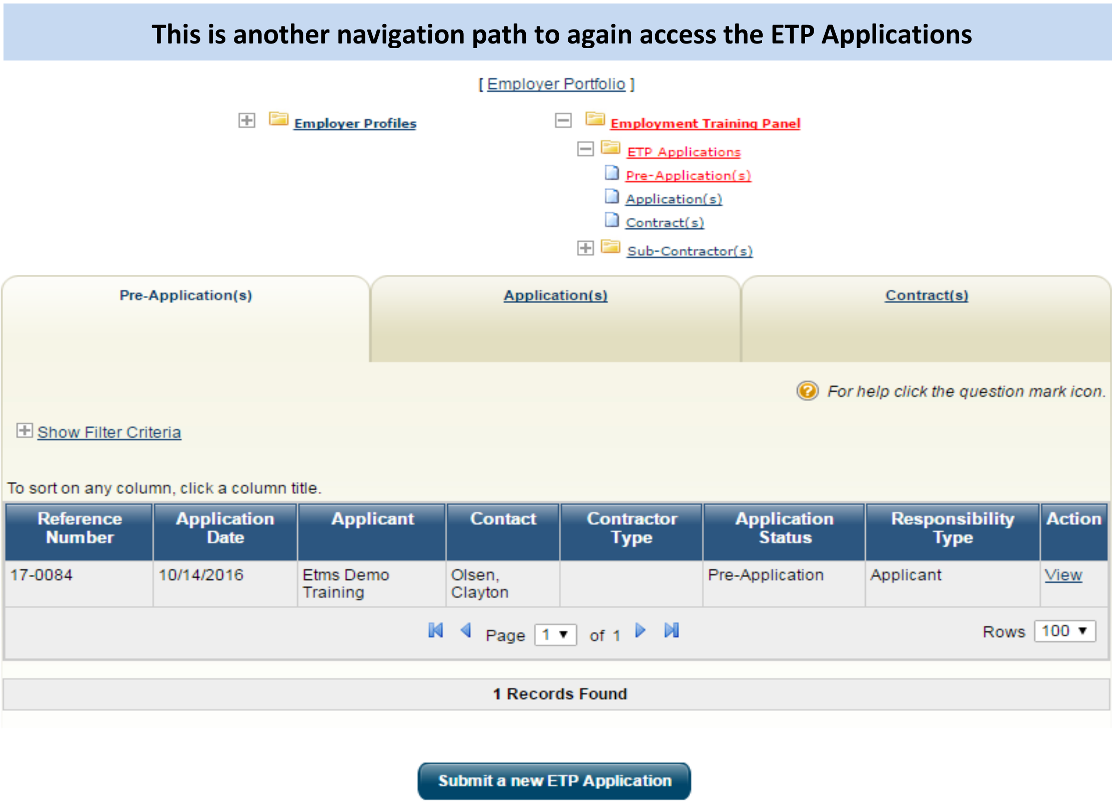


The Employer Portfolio link includes several folders and subfolders organized as two (2) filing trees as shown in the *Employer Portfolio Link Screenshot*. Each of these main folders contains many subfolders with information and tools, organized by subject matter.

2.2.2.2.1 Employer Profiles

The Employer Profiles links provide a link to the Corporate Profile and Communication Profile areas of the system as shown in the *Employer Profiles Link* Screenshot.

Employer Profiles Link

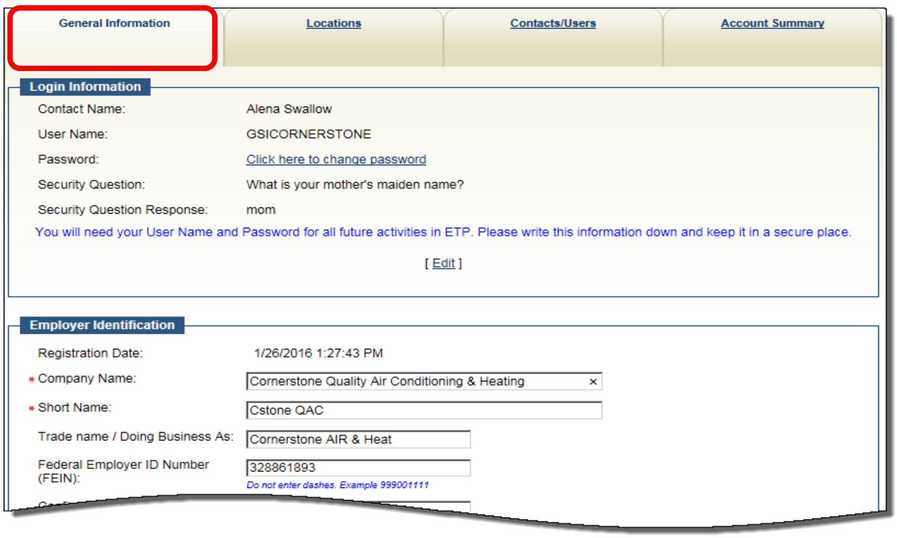


Corporate Profile

The first folder in the Employer Portfolio is the Corporate Profile. As with other areas of the ETMS system, labeled tabs are used to organize information. In this section, four (4) labeled tabs are used – General Information, Location, Contacts/Users, and Account Summary.

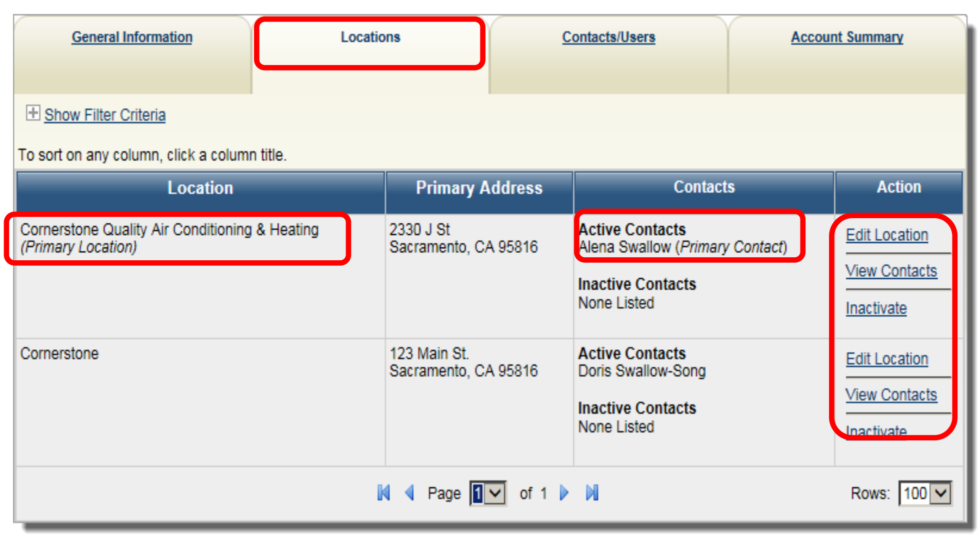
The first in the series of tabs is for general information as shown in the *General Information Tab* Screenshot.

General Information Tab



- **General Information Tab** – Contains basic company information (e.g., FEIN, CEAN, industry code, number of employees, primary and mailing address, contact information, and company profile, etc.).
- **Locations Tab** - Displays the company's locations in a table format, as shown in the *Locations Tab* Screenshot. The table displays each location's address and primary contact. From this screen, the employer can edit location information, add locations, delete locations, and make locations active or inactive.

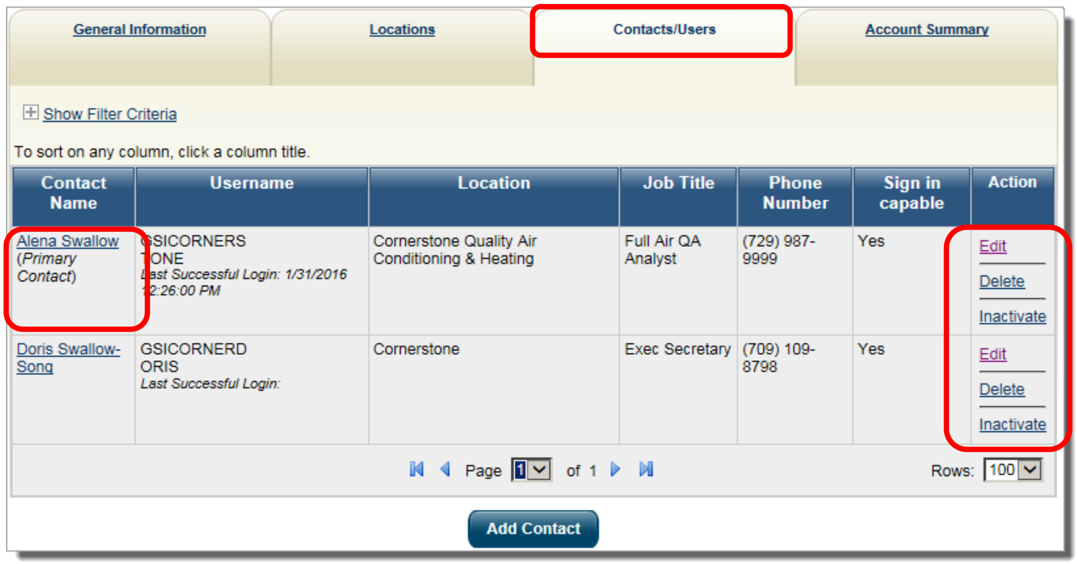
Locations Tab



Note: The Primary Contact must be associated with the Primary Location. Both are defaulted to the contact information collected at registration; however, the primary user can change these at any time.

- **Contacts/Users Tab** – Organized in a table format under the *Contacts/Users Tab* is the company's contact information including contact username, location, title, phone number and whether the contact has system login privileges. From this screen, the primary contact can edit, delete or inactivate contacts as shown on the *Contacts/Users Tab* Screenshot.

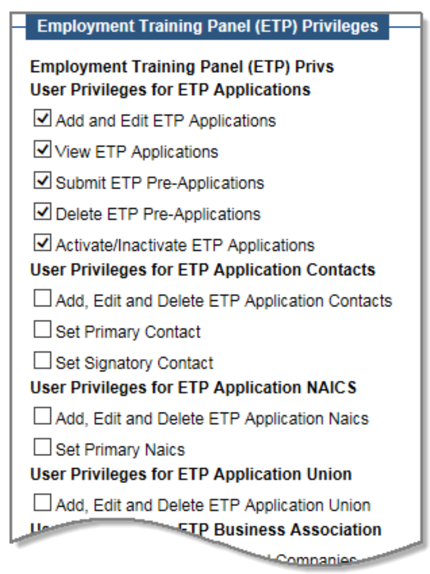
Contacts/Users Tab



Additionally, user access information is displayed. This is an important feature for customers that have many active users that would be accessing specific application and contract records. This is one of the many reasons to have individual user log on accounts.

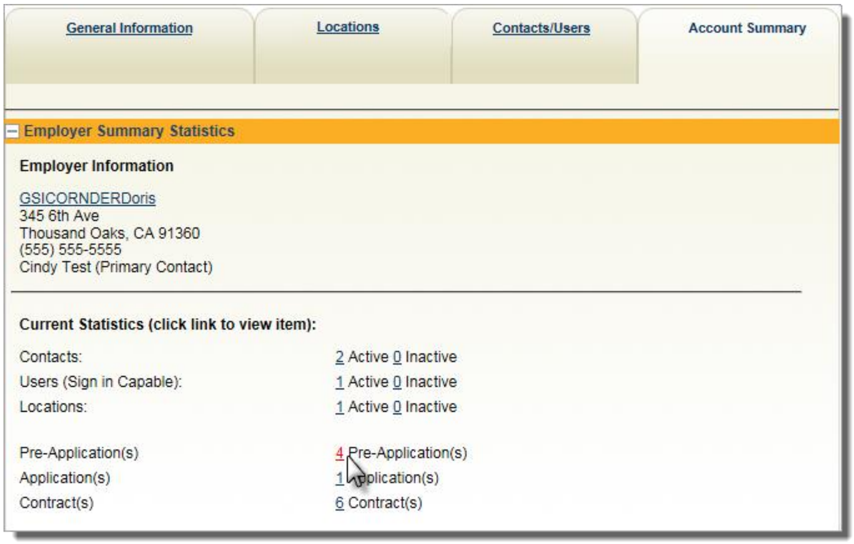
By clicking on **Edit**, additional privileges for each contract can be defined. The *Employment Training Panel Privileges* tab is organized as a basic checklist and the primary contact confines unique sets of privileges for each user.

Included in Section 3.3.4 - *Employer Contact Information* of this Chapter and Volume of the Guide is additional information on these specific functions.



- **Account Summary Tab** - Displays statistics about the employer, such as the number of contacts, locations, pending ETP applications, etc., as shown in the *Account Summary Tab* Screenshot.

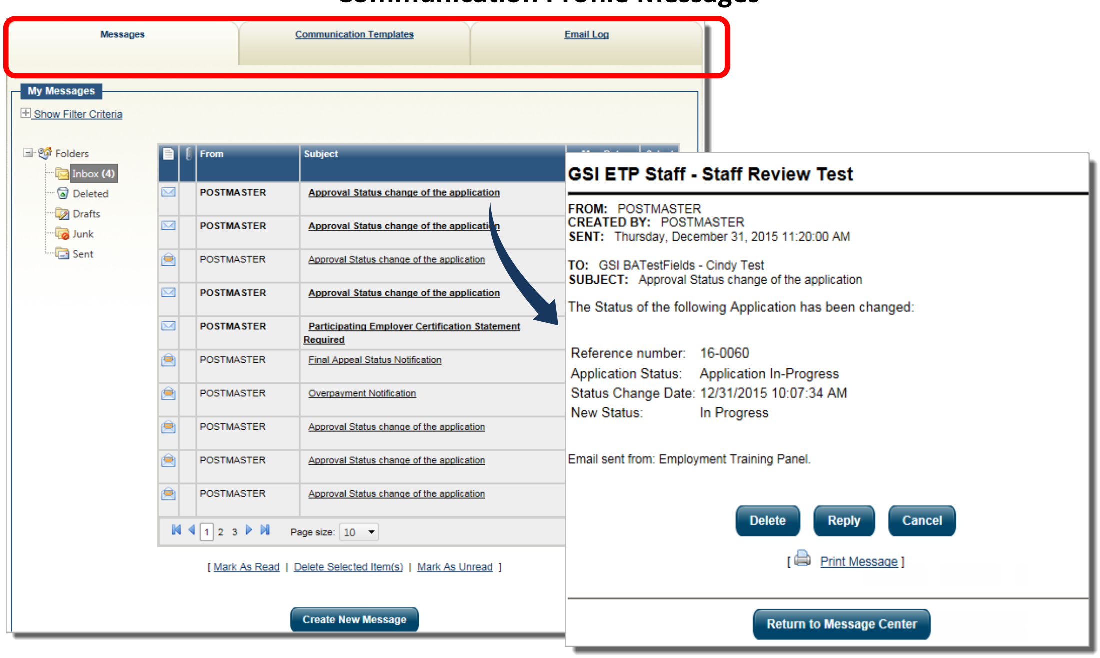
Account Summary Tab



Communication Profile

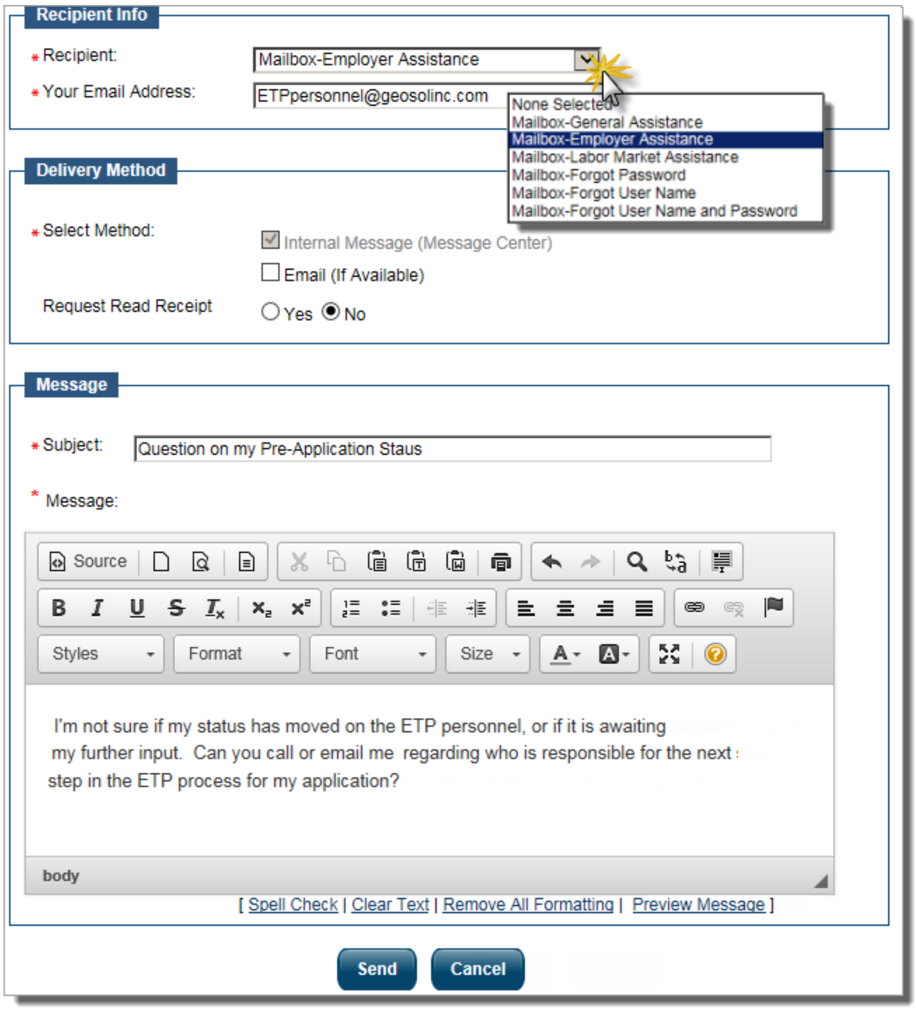
The *Communication Profile Messages* under the Employer Portfolio contains three folders: Messages, Communications Templates, and Email Log as shown in *the Communication Profile Messages* Screenshot. The Screenshot also provides a view of an opened ETMS message.

Communication Profile Messages



- **Messages Tab** - On the *Messages Tab*, users can see internal messages sent to them either from staff or from automated alerts, e.g., a message pertaining to an Approval Status change of the Application. Although employers may not be able to send reply messages to some system generated alerts, they can send and receive messages and send a new message to recipient locations, e.g., mailboxes set up for email regarding password or general assistance problems. An example of a system request is shown in the *Sample ETMS Message* Screenshot.

Sample ETMS Message

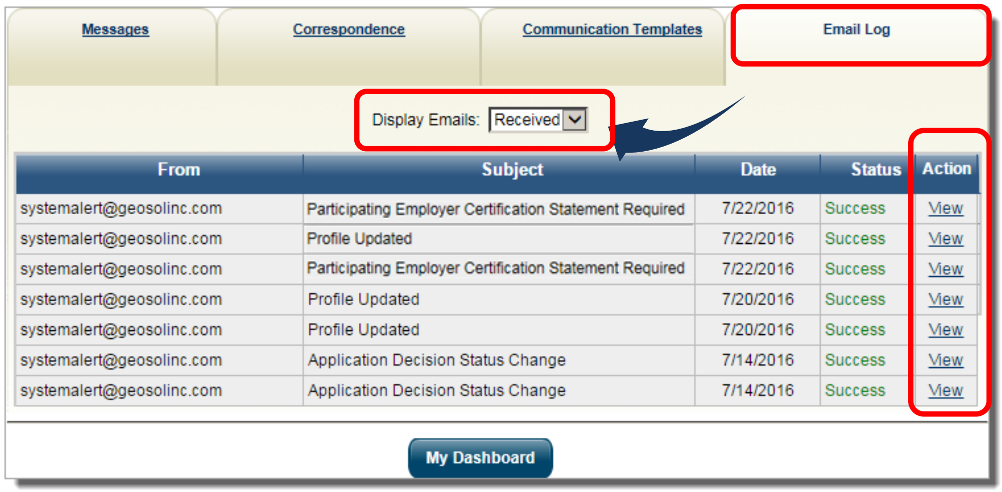


To open the Messages tab, the user will select **Employer Portfolio > Employer Profiles > Communications Profile** from the Quick Menu.

Note: New ETP customers that created an account via employer self-registration will not be able to create new messages until a staff member has verified the user's account.

- **Email Log Tab** - The *Email Log Tab* displays the email messages the customer has sent or received when using the system. Customers can filter the list of emails by using the **Display Emails** pull down. The *Email Log View* Screenshot shows a filter to display emails that have been received. As with other ETMS features, additional details on an email are retrieved by clicking the **View** link in the Action column.

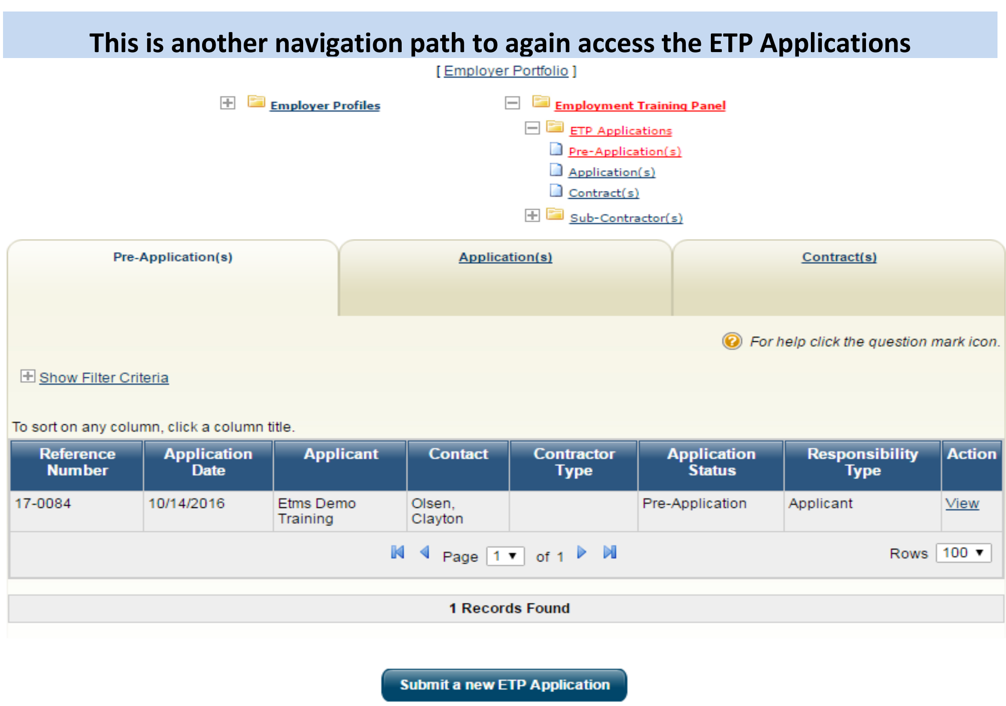
Email Log View



2.2.3 *Employment Training Panel Tree Structure*

It is key for users of ETMS to gain access to information about their ETP Applications and Contracts from anywhere in the system. This functionality is provided with the use of the Left Navigation Menu features of the Employment Training Panel Group links, as shown in the *Employment Training Panel* Screenshot. It is also available from the Employment Training Panel Tree Structure.

Employment Training Panel Link



From these areas, users can access specific information on their preliminary application, applications and contracts on subcontractors and web references as show in the *Employment Training Panel Navigation Options* Screenshot.

The Sub-Contractor(s) fly-out contains two (2) options, Client(s) and Sub-Contractor(s). The sub-contractor will use Client(s) to view all the employers who have added them to their contract. The employer will use the Sub-Contractor(s) fly-out will list all the sub-contractors for they have added.

The Web References fly-out contains information concerning ETP.

Employment Training Panel Navigation Options Screenshot

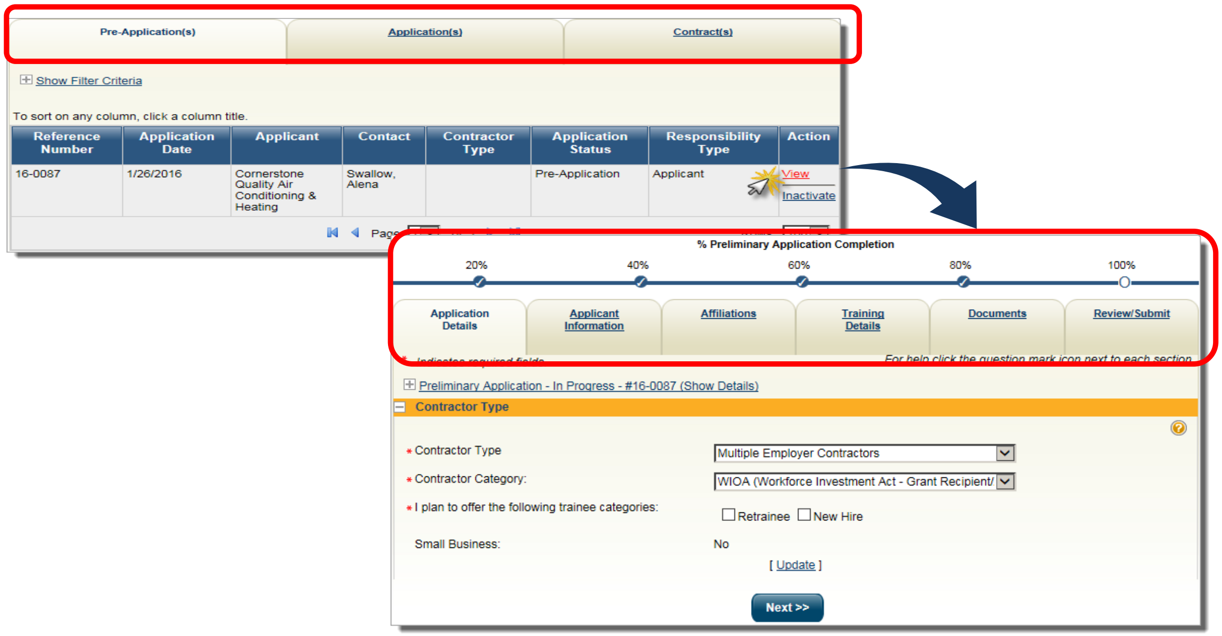
As discussed in in *Section 2.2.1 - Fly-out Features* in this Chapter and Volume of the Guide, hovering over the ETP Applications area will present the user with the next level of navigation. From here users have the option to go to any of the three (3) ETP workflow areas:

- Pre-Application(s) – display any Applications still considered to be in a Pre-Application status (e.g., In Progress, Eligibility Review, and Site Review).
- Application(s) – display any Applications that have moved to an Applications status (e.g., Application In-Progress, Application Development, and Proposal Review).
- Contract(s) – display any Applications moved to an accepted Contract status.

Once the user selects the major workflow area, they may access a specific Preliminary Application, Application or Contract.

These navigation features are shown in the *Access to ETP Applications Tabs* Screenshot.

Access to the ETP Applications Tabs



Each of the workflow tabs presents a table listing specific Preliminary Applications, Applications and Contracts. The standard feature of selecting **View** from the action column will open an Application/Contract and the subtabs that can be opened to complete each of the necessary processing steps. Note the progress bar at the top of the subtabs, this reflects the percentage amount of completion. This provides a quick summary of how much of the work has been accomplished for a specific Application/Contract.

The specifics associated with using the various tabs to complete a Preliminary Application, Application and/or Contract and its relationship to the overall ETP workflow are discussed in detail in the remaining Volumes of this Guide.

VIDEO

*For a general overview of the ETMS system and principals of navigation in the system as an employer, you can also use the training video in the ETMS Learning Center or on the ETP web site, titled **How to Navigate in ETMS**.*

3 Employer Registration and Orientation

Chapter Contents

As covered in *Chapter 1 - ETMS Overview - Workflow and System Access,* ETP provides funding to customers and business to assist in upgrading the skills of their workers through training. This funding is provided to both Single Employer Contractors that will only be training their own trainees and to Multiple Employer Contractors that will be training the trainees of more than one company. Within the program, a company determines their own training needs and how to provide training. ETP determines if the company meets the program requirements for participation and if the training is in line with State policies and Panel priorities.

ETMS is a web-based system that supports the management of the ETP Preliminary Application, Application, and Contract processes. Both State staff and customers use this system. A Single Employer Contractor or Multiple Employer Contractor representative that acts on the behalf of a Single Employer Contractor or Multiple Employer Contractor in the development of the Applications and manage functions of the Contract also uses this system.

The entire process first starts with the customer completing Registration and the Orientation process. Once you are registered in the system, you will not need to repeat this process.

VIDEO

*For a general overview of the registration and orientation, you can also view the training ETP training video, titled **Registration and Orientation**. It is available in the* *in the ETMS Learning Center or on the ETP web site.*

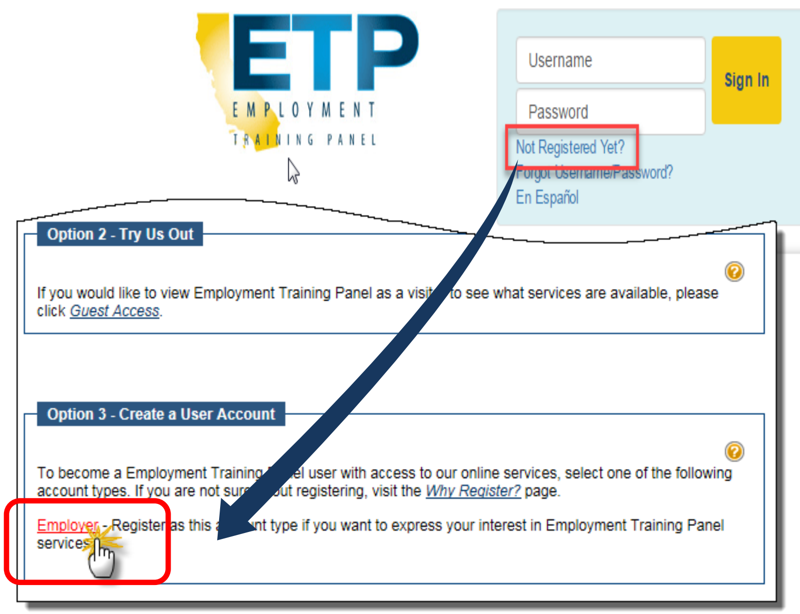
3.1 Employer Self-Registration

ETMS is designed to allow customers to self-register on the website. ETP staff can also assist them with Registration; however, the process is straightforward and consistent with registering on other websites. To start the Registration process, the customer will:

- Access the ETMS Home Page (put in address)
- From the Home Page, click the **Not Registered Yet?** link to create a new account.
- On the next screen, click the **Employer** link under Option Three (3) – *Create a User Account* section.

These steps are reflected in the *Navigate to Create an Employer User Account* Screenshot.

Navigate to Create an Employer User Account

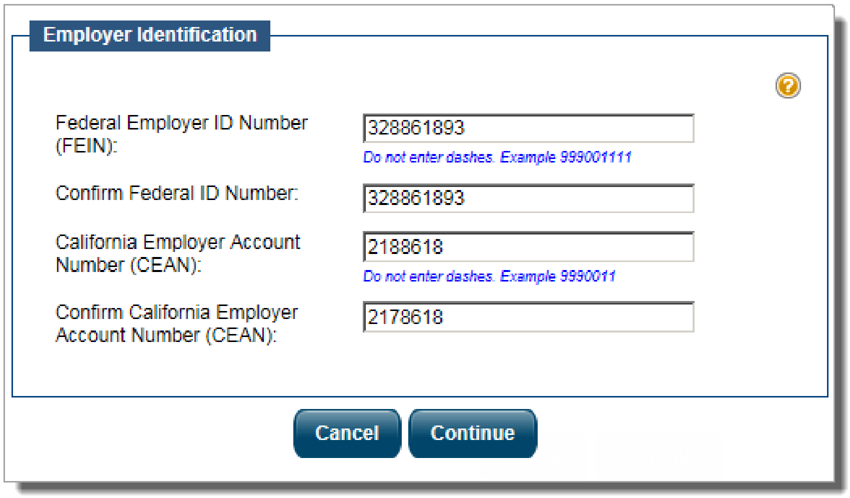


The system will open the Employer Identification screen, followed by the Employer and General Information screens for Registration. Specific fields are provided to add the necessary Registration information. Items marked with a red asterisk (*) are required fields to continue with the Registration process. The following sub-sections are described in each of these steps.

3.2 Employer Identification Screen

The first screen presented is the Employer Identification section as shown in the *Employer Identification Screen* Screenshot. Customers will enter basic company information and these fields will be used to determine if the company already has an account within ETMS.

Employer Identification Screen



- **FEIN** – Enter the company's Federal Employer ID number, without dashes or spaces.
- **Confirm FEIN**
- **CEAN** – Enter the California Employer Account Number, without dashes or spaces.
- **Confirm CEAN**
- Users will then <u>click</u> on **Continue** to go to the Employer Registration Screen.
- At this point, if the user already has an account, the system will respond with a message to contact ETP to retrieve your username and password.
- The user would then <u>click</u> on **Cancel** and do the following:
  - ✓ Contact ETP. This is done by either emailing or calling the ETMS help desk.
  - ✓ **Sign In** as a registered user. Users who did not mean to Register; but simply sign in, would go back to the Register or Sign In section on the main page and enter their user information as shown in the *ETMS User Login* Screenshot shown below.

After successful Registration, you will come back to this screen and put in your Username and Password, and then <u>click</u> the **Sign-in** button. If at any time you forget your Username and Password, you can always <u>click</u> the link below the Sign-in button, and follow the simple steps for retrieving that information.

3.3 Employer Registration – General Information Screen

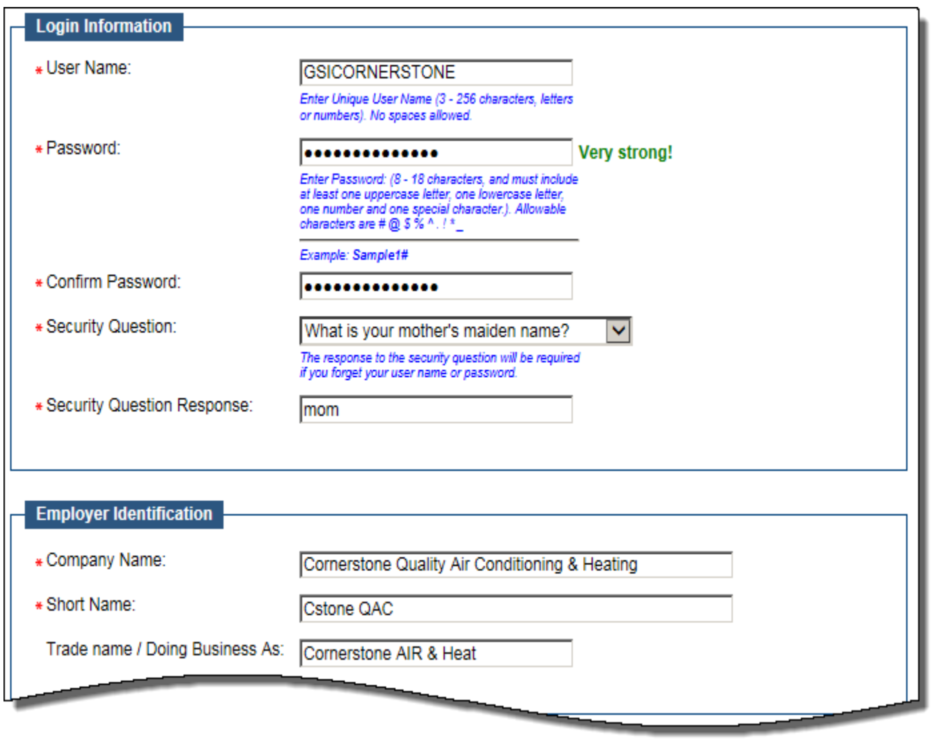
Once the user's information is verified, a scrolling screen (multiple areas are viewed moving up and down the screen) is displayed for users to enter Registration information. In these various screen areas, customers are to enter a variety of information pertaining to their business and establish a user account.

For the purposes of the Guide, sections of this screen have been separated and will be addressed individually.

3.3.1 Login Information

When the screen refreshes, create a unique User Name and account as shown in the *Employer Registration, Login Information and Employer Identification Section* Screenshot.

Employer Registration, Login Information & Employer Identification Section



Fill in the Login Information section by creating a User Name, Password; select a Security Question and Security Question Answer for the company's primary contact person.

- **User Name** – Enter a User Name (with no spaces or special characters).
- **Password** – Enter a password in the Password field and in the Confirm Password field. Please follow the guidelines for the password as noted in the blue text of the under the password filed. Create a secure Password you can remember, and type it twice.
- **Security Question & Answer** – To assist if you forget your Username, Password or both, a created security question will assist in resetting the account. To establish the questions, use the drop-down to select and type your security question and type in your response.

3.3.2 Employer Identification

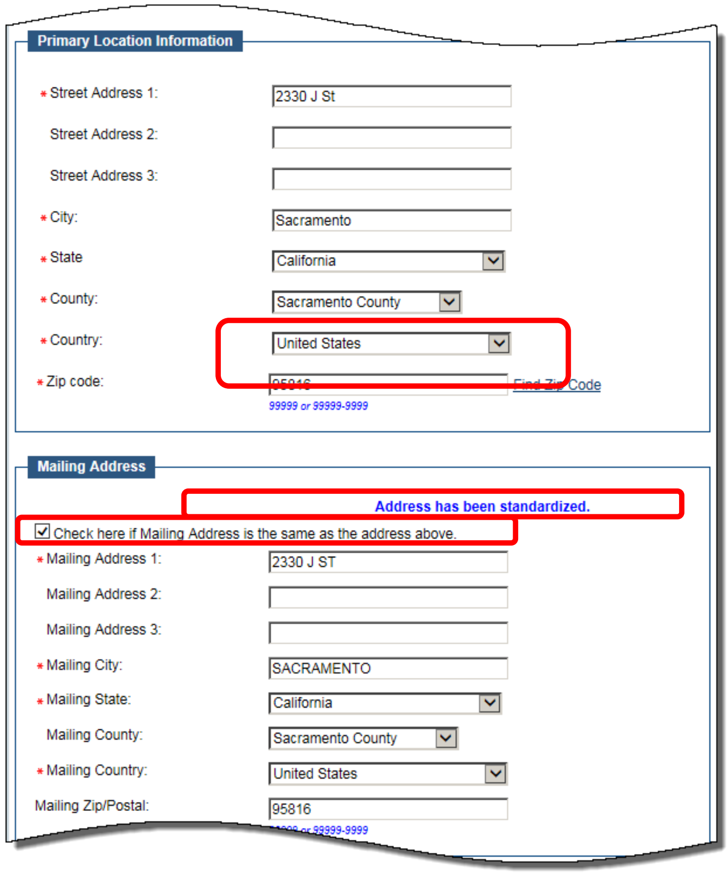
In the Employer Identification section, there are three (3) fields presented, two (2) are mandatory and one (1) is optional:

- **Company Name** – Enter the company name in the Company Name field.
- **Short Name & Trade Name (DBA)** – Next, provide a short version of your company name. This is a mandatory field and something must be entered. If the short version can anything the user wants. Your can also just again provide the same company name. Or provide a Doing Business As (DBA) and then use the Trade Name/Doing Business As for trade name.
- **Trade Name / Doing Business As**: This is not a required field, but if the company has a Trade Name/Doing Business*,* it can be provided here.

3.3.3 Employer Primary Locations & Mailing Address

There are two (2) methods to entering your location information within the ETMS system. In the Primary Location Information section as shown in the *Primary Location and Mailing Address Fields* Screenshot*,* the user can enter the company's zip code in the field provided. Click the **Find Zip Code** link to search for a zip code.

Primary Location and Mailing Address Fields



Note: ETMS will auto-populate the City, County, and Country fields, based on the zip code entered.

The next section is the Mailing Address *as shown in the Primary Location and Mailing Address Fields* Screenshot above. Your mailing address can be the same as your Primary Location Address, or a different address. If it is the same, check the box in the top left, and the same information will populate.

When the address populates, it may change slightly, because there is a United States Postal Service Address database checking the address in the background. If the address is verified, it will change the address and say in blue letters Address Has Been Standardized.

If it does not find the address, it will state that the address has not been standardized.

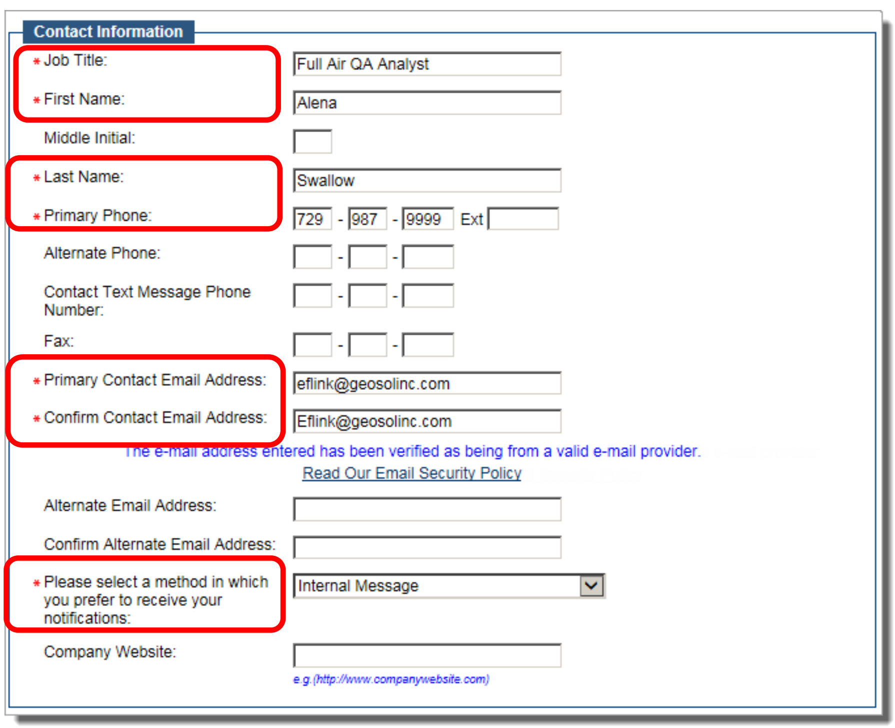
If the mailing address is different from the Primary Location Information, simply enter it manually, ignoring the check box.

3.3.4 Employer Contact Information

The user will next provide their company's Contact Information. This includes basic data usually associated with a company manager, CEO, President or with the best contact person related to ETP contracts. Information such as Job Title, Name, Primary Phone, Email Address and Preferred Notification Method are required.

In the *Contact Information* section, enter information about the company's primary contact person as shown on the *Employer Registration Screen - Contact Information Section* Screenshot.

Employer Registration Screen – Contact Information Section



There are seven (7) mandatory fields and seven (7) optional fields in this screen section:

- The primary fields are:
  - ✓ ***Job Title*** – Enter the job title of the company's primary contact.

- ✓ ***First Name, Last Name*** – Enter the first and last name of the company's primary contact; the middle initial is optional.
- ✓ ***Primary Phone*** – Enter the primary phone number for the contact. Enter phone numbers for text messages and for faxes, if desired.
- ✓ ***Email* and Confirm Email** – Enter the contact's email address in the fields provided.
- ✓ ***Notification Method*** – Select the contact's preferred method of notification from the drop-down list. When the contact receives messages from staff or other system users, the system will send the message via the selected notification method.

- The optional fields are:
  - ✓ ***Middle Name –*** Enter the middle name if desired.
  - ✓ ***Alternate Phone, Fax and Test Messages Number*** – Enter the alternate phone number for the contact. Enter phone numbers for text messages and for faxes, if desired.
  - ✓ ***Alternate Email* and Confirm Alternate Email** – Enter the contact's alternates email address and confirm as desired.
  - ✓ ***Website*** – Enter the company's primary web address if desired.

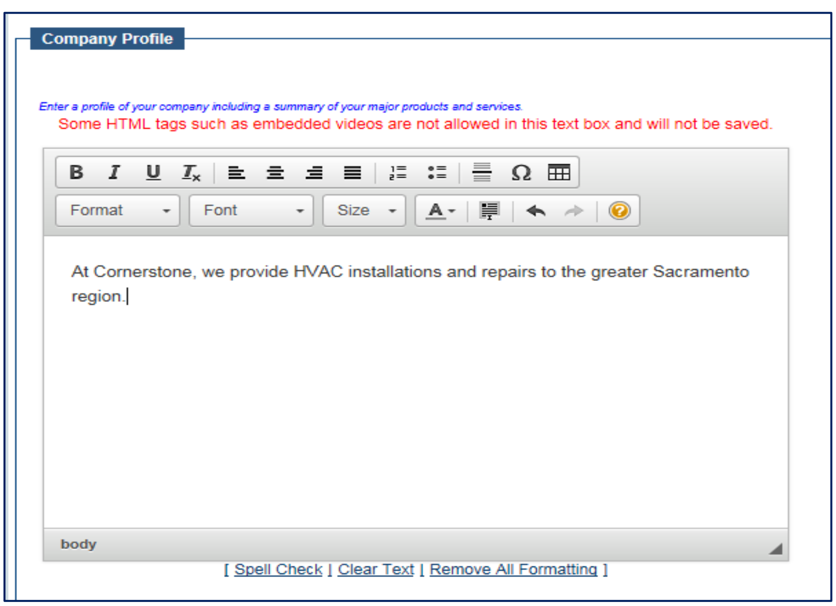
Remember to click the **Save** button at the bottom of the page.

If you missed any information marked as required fields, you will need to go back and provide additional required information.

3.3.5 Company Profile

In this field, tell ETP something about your business; this helps in the Application Process. Just enter information into the text box. The narrative should be concise, pertinent information as it relates to your company's business activities and training needs. A good example is shown in the *Company Profile Section* Screenshot below. This is an optional field and does not have to be filled in.

Employer Registration Screen – Company Profile



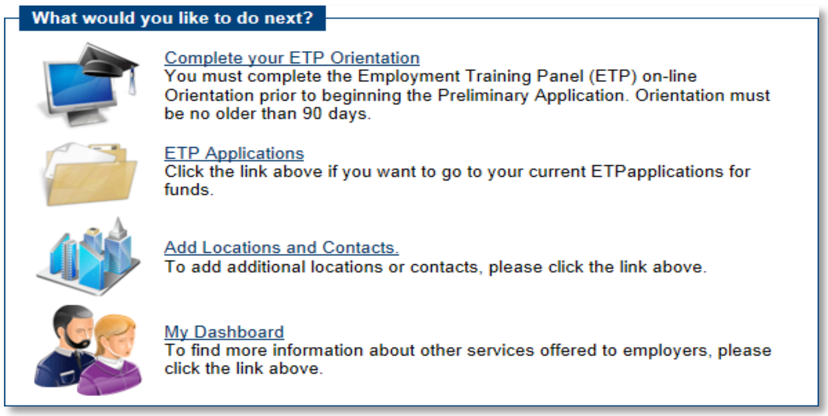
Remember to Click the **Save** button at the bottom of the page. A Registration Completion page displays when Registration is done, as shown in *The Employer Portfolio* Screenshot. The Employer's Portfolio, which includes their Employer Profiles and Employment Training Panel folders and tabs, which will be used as the customer continues into the Preliminary Application process.

The Employer Portfolio (Created at the End of Registration)

3.4 Next Steps

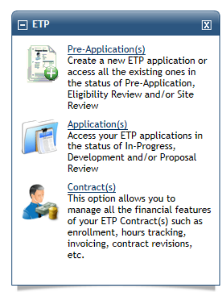
At the end of Registration, the system displays a Registration Completion page, which indicates, "What would you like to do next?" and provides links to options that may be of interest to the customer as shown in the *Registration Completion Page* Screenshot.

Registration Completion Page



Customers can use any of the links to navigate to the corresponding part of the system. However, the first step should be to complete the ETP Orientation, since it will be required before the ETP Pre-Application can be started.

- **Orientation** – Customers use this line to complete an orientation, click the **Complete your ETP Orientation** link to open the Orientation screen. The Orientation simply walks the user though screens they must read before applying for ETP funds.
- **Applications** – Click **ETP Applications** to open the Pre-Applications tab of the ETP Menu to the ETP Applications folder. This is the starting point for customers to submit a new Application (the Pre-Application process is covered in Volume 2, Chapters 4 for Single Employer and Chapter 5 for Multiple Employer Contractor.



- **Locations and Contacts** – Click the **Add Locations and Contacts** link to add or edit multiple company locations and/or contacts/users. Clicking this **link** opens the customer's Corporate Profile from the Locations tab. See Chapter 2 of this Volume in the Guide for more on the Locations tab, and on the contacts/users Tab.
- **Dashboard** – Click the **My Dashboard** link to open your dashboard. See the description of the dashboard and other navigation features in Chapter 2 of this Volume in the Guide.

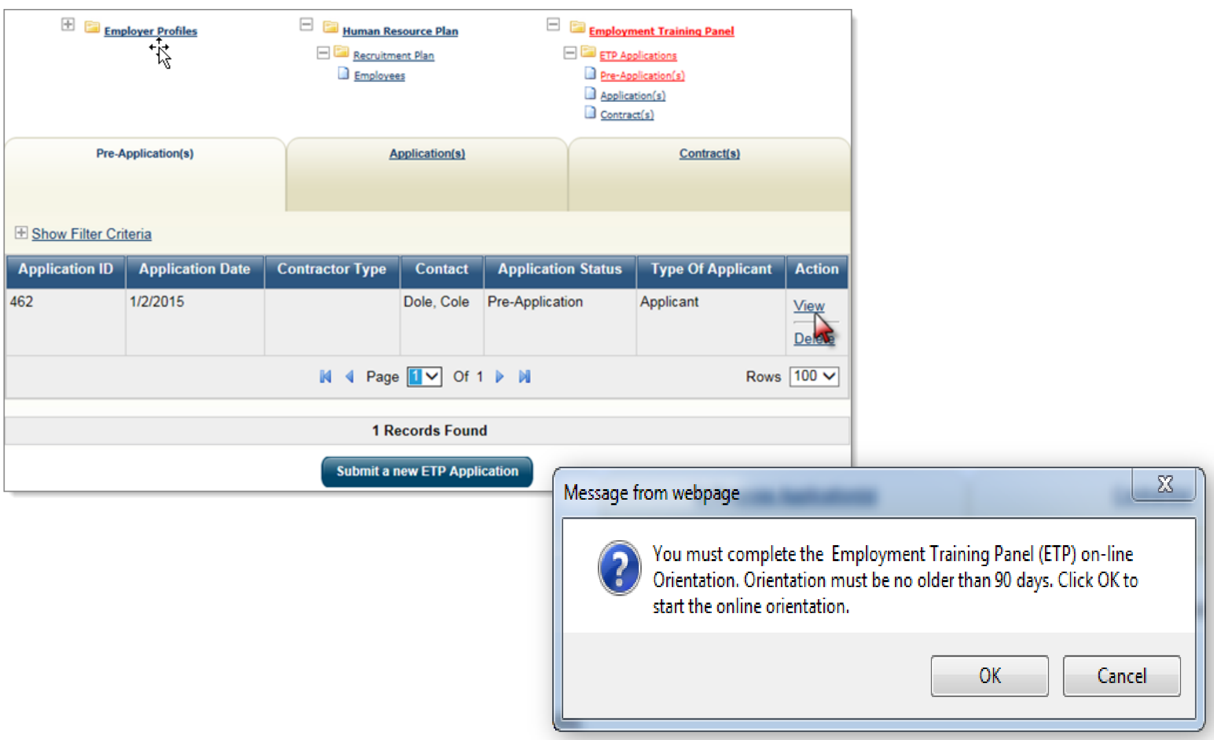
*For a general overview on how to manage your contacts, you can also view the training ETP training video, titled **Manage Your Contact Profile**. It is available in the in the ETMS Learning Center or on the ETP Website.*

Newly registering customers will finish their registration by clicking the **Complete your ETP Orientation** link, as the first Next Step. This will display the first screen to read (of approximately 20 screens) in the orientation process.

ETP customers must have completed the online ETP Orientation within the preceding ninety (90) days in order to submit a Pre-Application. ETP customers who have not submitted an ETP Application previously (or those who have not retaken the Orientation within the last ninety (90) days), will be prompted to complete the orientation before proceeding to the Application. Participating Employers of a Multiple Employer Contract are not required to take the orientation.

With Registration completed and shown above, the system automatically creates an ETP Preliminary Application, which the user can access on the Pre-Applications tab. If the customer did not complete an Orientation, they can still access the Pre-Applications tab, but when they click the **View** link to start a Pre-Application on the tab, a pop-up message will remind the employer to complete the Orientation as show in the *Pre-Application Tab – Orientation Reminder* Screenshot.

Pre-Applications Tab – Orientation Reminder



Click the **OK** button to open the Orientation, and read each of the informational screens. A series of windows will display.

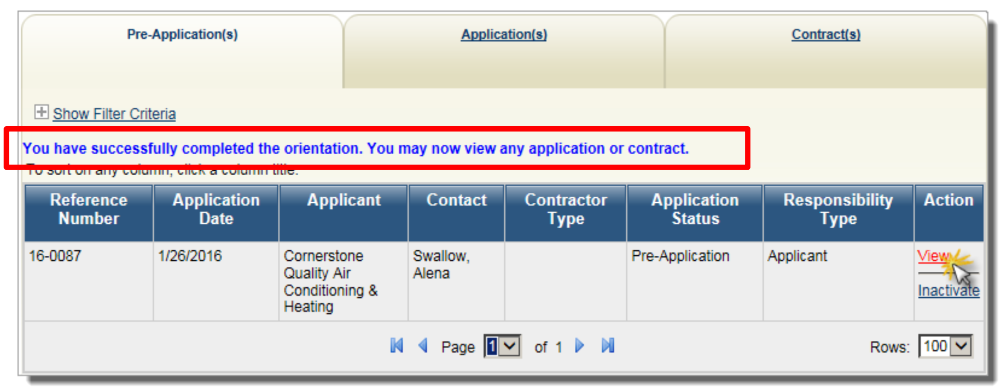
Customers will read the text on each window/screen and then click the **Right-Arrow** button to proceed to the next window as shown in the *Sample ETP Orientation Windows* Screenshot. Users can also Click the **Left-Arrow** button to go back to previous slides.

Sample ETP Orientation Windows

On the final window, click the **Finish** button to complete and close the ETP Orientation.

The system will open the Applications Tab where an onscreen message lets the customer know the Orientation was successful.

Employer Pre-Application(s) Tab (With Message after Completed Orientation)



To begin the Application Process for their first ETP Application, the customer will access the Pre-Applications tab, click the **View** link (shown above), and follow the instructions detailed in the Start the Preliminary Application. In Volume 2 - Chapter 4 addresses the process for Single Employers and Chapter 5 covers the Multiple Employer Contractor process.