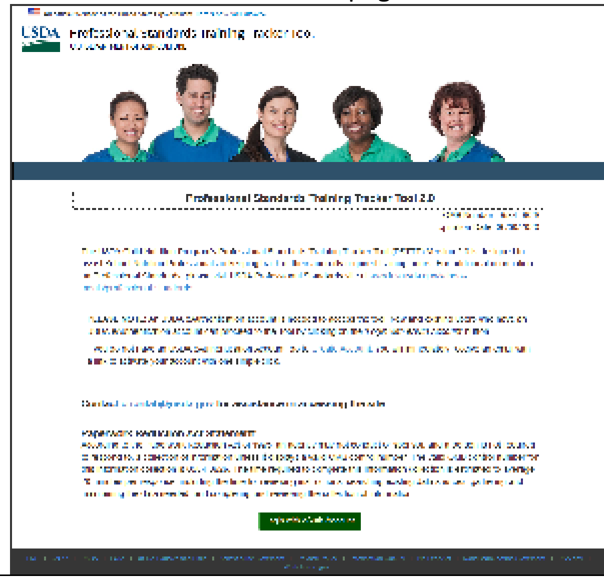
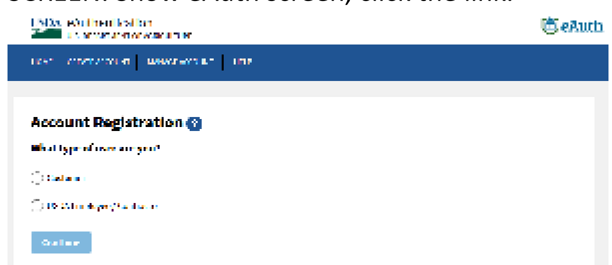
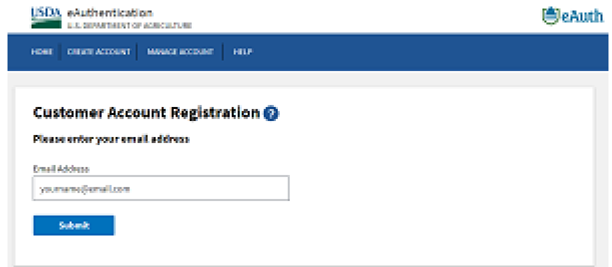
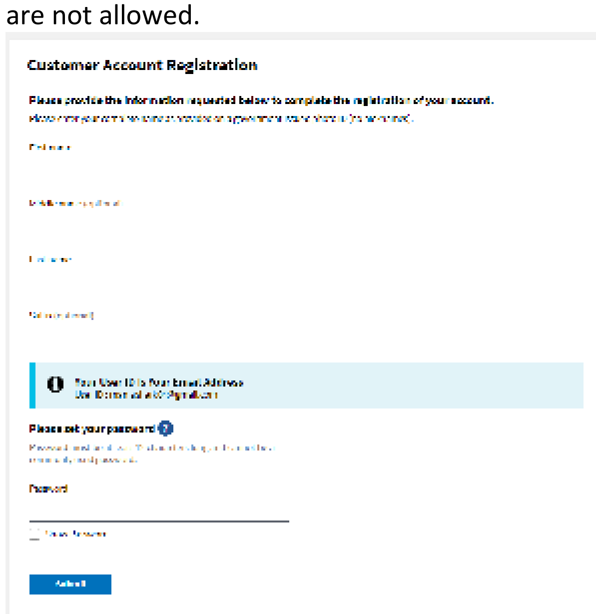
APPENDIX D: Professional Standards Training Tracker Tool (PSTTT) Training Videos and Transcripts

Contents

Chapter 1: Create a New eAuthentication Account

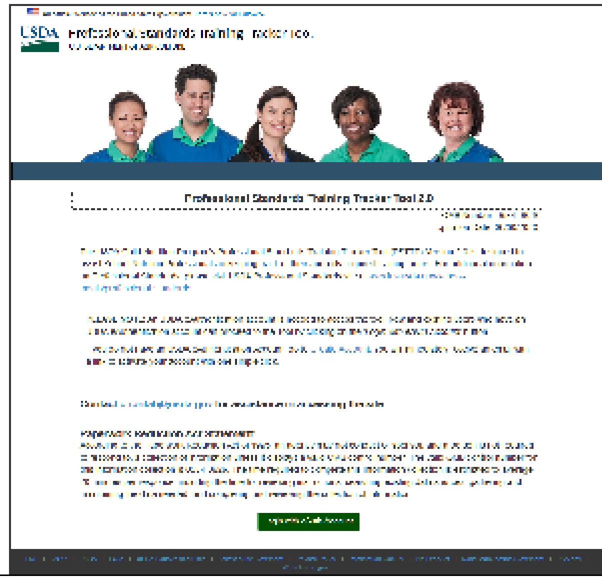
Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is Chapter 1: Create a new eAuthentication Account.	SCREEN: Show Title Frame Title slide shown till the end of the "This is Chapter…." statement.
The Professional Standards Training Tracker Tool operates within the U.S. Department of Agriculture (or USDA) Food and Nutrition Services official website. Users must register with an USDA eAuthentication account to access the Tool. Professional Standards Training Tracker Tool's front page contains information and link to create a new eAuthentication account. After the account is successfully created, it may be used to log into the Training Tracker Tool. This video will walk you through the steps needed to set up an eAuthentication account.	SCREEN: Show PSTTT About page 
Click the "Create Account" link to take you to the eAuthentication system's registration page.	SCREEN: Show eAuth screen, click the link. 
You will be asked to select your type of user – Customer or USDA Employee / Contractor. For School and State users, select the Customer radio button and press the Continue button.	SCREEN: Select Customer, press Continue 

OMB Burden Statement: This information is being collected to assist the Food and Nutrition Service as it helps local educational agencies and school food authorities to meet the training requirements and assist in keeping track of training as required by the Healthy Hunger Free Kids Act. This is a voluntary collection and information entered into the free web-based application tool is solely for the benefit of the local education agencies and school food authority's staff for the tracking of training and storing staff training information. This collection brings in personally identifiable information under the Privacy Act of 1974 via the user's USDA eAuthentication account. According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0584-0626. The time required to complete this information collection is estimated to average 1 hour per response, including the time for reviewing instructions, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: U.S. Department of Agriculture, Food and Nutrition Service, Office of Policy Support, 1320 Braddock Place, 5th Floor, Alexandria, VA 22314 ATTN: PRA (0584-0626). Do not return the completed form to this address.

Next, enter your email address and press the Submit button.	SCREEN: Enter Email, press Submit 
A confirmation page will be displayed with a message stating that an email was sent to the email address entered. You will need to click on the link provided in the email message to complete the registration process.	SCREEN: Display the confirmation message 
Check your inbox for an email titled “eAuth - Confirm Email”. Open the email and press the “Confirm email address” button.	SCREEN: Display the email 
You will be redirected to the eAuthentication system’s Account Registration page, where you will enter your complete name as provided on a government issued photo ID. Your email address will become your eAuthentication ID. The next step is to enter a password. Password must be at least 12 characters long and cannot be a commonly used password. Finally, press the Submit button.	SCREEN: Show Account Registration page, go through the steps. Show which special characters are not allowed. 

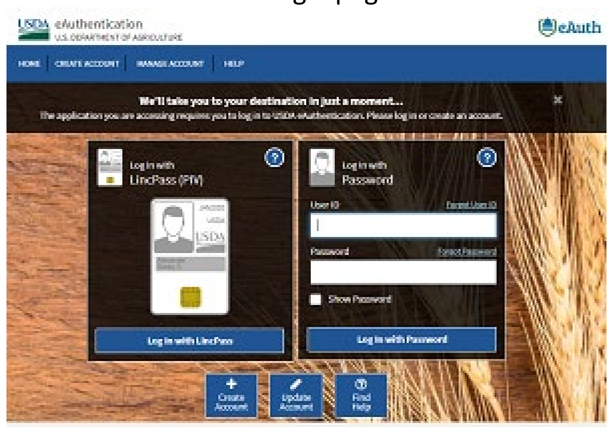
<table>
<tr>
<td>The Customer Account Registration confirmation page will be displayed. It will have the registration completion message. Your registration details will also be emailed to your email account.</td>
<td>SCREEN: Show Customer Account Registration page

</td>
</tr>
<tr>
<td>Now you can use the user ID (your email address) and the password you have created to log in to the Professional Standards Training Tracker Tool by clicking the “Login with eAuth Account” button.</td>
<td>SCREEN: Show About page, press the “Login with eAuth Account” button



</td>
</tr>
<tr>
<td>It will redirect you to the eAuthentication Login page.

Enter your user id and password to access the Professional Standards Training Tracker Tool.</td>
<td>SCREEN: Show eAuth Login page



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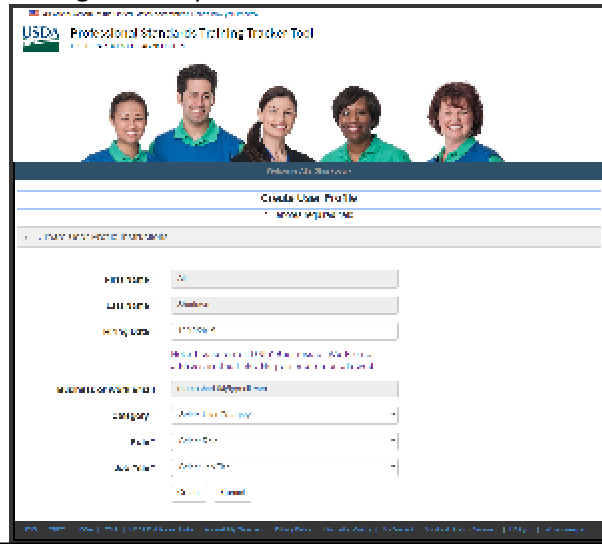
The very first time you log in, you will need to set up your Professional Standards Training Tracker Tool user profile. Please see our separate training video for this process. Once your user profile is set up, you are redirected to the tool's Homepage. More instructional videos are available under the Help menu to navigate the tool.	SCREEN: Show Create User Profile page, go through the steps 
As a reminder, please use the Contact Us menu item under the Help menu to email cnpntab@fns.usda.gov for any questions or challenges you may have while using the Professional Standards Training Tracker Tool. Thank you for viewing!	

Chapter 2: Login for the First Time

Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is Chapter 2: Login for the first time.	SCREEN: Show Title Frame
Start Your Profile	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be talking about the fields needed for all accounts. The Professional Standards Training Tracker Tool operates within the U.S. Department of Agriculture (or USDA) Food and Nutrition Services official website. A USDA eAuthentication account is required to login to the Training Tracker Tool. You will need to create your own eAuthentication account before you can login to the Tool. Users must register with an USDA eAuthentication account to access the Tool. Professional Standards Training Tracker Tool's front screen contains information and link to create a new eAuthentication account. After the account is successfully created, it may be used to log into the Training Tracker Tool. You will need to create your own eAuthentication account before you can login to the Tool.	SCREEN: Show PSTTT About screen
Click the "Create Account" link on the About screen to create an account.	ACTION: Point mouse at Create Account link
The Professional Standards Training Tracker Tool is open to any school nutrition professional, who would like to track their Professional Standards required training hours.	
On the Training Tracker Tool's front screen, you will find information about the functionality of the tool, as well as,	ACTION: Select the paragraph at the top of the screen
Information on Creating an USDA eAuthentication account,	ACTION: Select the text in the blue box
an email contact to get help with our Tool,	ACTION: Select the email sentence
Information on the Paperwork Reduction Act Statement,	ACTION: Select the Paperwork Reduction Statement
and our "Login with eAuth Account" button.	ACTION: Point mouse at login button
When you click the "Login with eAuth Account" button, you will be directed to the eAuthentication login screen.	ACTION: Click the Login with eAuth Account button SCREEN: Show eAuth login screen
You will need to enter your username and password that you set for your eAuthentication account here.	ACTION: Enter the login information and click the Submit button

When you submit your information, eAuthentication does the validation for your user account. If everything looks good, you will be automatically redirected back to our Tool. When you reach the Professional Training Tracker Tool for the first time you will be brought to the Create User Profile screen.	SCREEN: Show Create User Profile screen;
It shows your First Name,	ACTION: Point mouse at first name field
Last Name,	ACTION: Point mouse at last name field
and email address as you have set them while creating your eAuthentication account.	ACTION: Point mouse at email field
All other required fields on the screen must be filled out before your profile can be saved. The required fields are indicated by an asterisk. Now, we will work on setting up a profile.	
The first field to fill in is the Hiring Date. This is intended to be the same date that your manager would reference as your start date during your annual review. This field defaults automatically to the current date, so please make sure to enter your correct hiring date.	ACTION: Click on Hiring Date field
The Category field is critical, as it will determine what fields are shown on this screen, and also customize the Training Tracker Tool screens for you. Please choose the Category which best fits your situation.	ACTION: Point mouse at Category field
There are only three options, SCHOOL, STATE, and USDA: 1. Select SCHOOL for people working for a school district, group of schools, or a school directly. 2. Select STATE for people working for a State Agency. 3. Select USDA for USDA staff.	ACTION: Show options in the category field
Once you select one of the Categories, the Create User Profile screen will change. This screen dynamically responds to your input in several fields, giving you only the fields you need to complete your profile.	ACTION: Select the value for School in Categories
The Role is also a critical field. The options available in this field are directly linked to the Category you selected. In general, there are supervisor and staff options available.	ACTION: Show options in the Role field, select Director
The options in the Job Title field depend on the Category and Role selected. The selected Job Title value will define the settings for the required number of training hours.	ACTION: Show options in the Job Title field
This concludes our review of the fields used by all users. There are more sections in this video that look at each combination of Category and Role. If you have started this video from the About screen, they will play automatically. You may also use the video controls to jump to the section that most closely matches your Category and Role as you see it on the screen.	SCREEN: Show Training Videos screen with Chapter 2 expanded

As a reminder, please use the help email cnpntab@ usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen.
Create a School Employee User Profile	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be showing an example of how to fill out the profile screen for a School Employee.	SCREEN: Show Create User Profile screen.
To create a user profile for a school employee, you will want to select School in the Category field.	ACTION: Select School in Category
The next field – Role - represents what role you have when using our Tool. If you anticipate that you will only ever log your own training records, select the Employee role.	ACTION: Select the Role - EMPLOYEE
The Job Title field is limited to the options which match the annual training hour requirements as listed on the Professional Standards Final Rule. This may not have the exact title that you might use on your resume, but it is important to make sure that you have the one that has the correct number of total required annual hours. You will be able to see the number of hours assigned to the Job Title you select here immediately after creating your account.	ACTION: Select the School Food Authority – Part Time Staff (less than 20 hours/week)
Once your Job Title is selected, you need to select your State. The State field displays options for all U.S. States, U.S. Territories, Department of Defense areas, and Bureau of Indian Affairs sites. Each user may only select one state option.	ACTION: Select Indiana from the list for the State value.
Next you will need to select a School District. If the School District you need is missing, please send an email to cnpntab@usda.gov, so the district can be added to the list.	ACTION: Select Adams Central Community Schools
School Employee users will also need to select a school at which they are working. Now that we have selected the School District, the Schools drop-down is populated with all schools in the District. If a school is missing from a School District, you may add a new school using the "Add New School" button below the Schools field.	ACTION: Open the Schools drop-down
Clicking on the "Add New School" button displays a window that allows user to enter school information through six required fields: State or Territory, School District, School Type, School Name, City, and Zip.	ACTION: Click the Add New School Button
There is the 'School Types Guidance Chart' information link above the School Type field. It opens a document in a new browser tab which provides information on different school types available.	ACTION: Click the School Type link, and return to form showing data in the screen.
Filling in this screen will add a new school to the State and School District entered. Note that the State and	ACTION: Fill out the fields: School = A Sample School;

School District default to the ones you selected for your Profile and are not editable.	City = Adams; Zip = 45678. Click the Save button.
Now that the school has been added to the school list, it can be selected from the Schools field.	ACTION: Select the new school.
If the Training Tracker has any Managers set for the school you selected, they will be displayed in the Manager filed. Manager is not a required field for this screen.	ACTION: Point to the Manager field
Once all fields on the Create User Profile screen has been filled out, press the “Create” button at the bottom of the screen to save the information. This will now take you to the Professional Standards Training Tracker Tool Home screen.	ACTION: Show with mouse ready to click Create button
This concludes our example for creation of a School Employee user profile. The last section of this video will demonstrate some of the screens you will have access to after your user profile creation. As a reminder, please use the help email at cnpntab@usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen
Create a School Manager User Profile	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be showing an example of how to fill out the profile screen for a School Manager.	SCREEN: Show new Create User Profile
Set the Category to School.	ACTION: Select the School Category
The next field – Role - represents what role you have when using our Tool. If you are expected to directly monitor or manage training progress for a group or are expected to log training for your employees - then Manager is what you should select for the Role.	ACTION: Select Manager role
The Job Title field is limited to the options which match the annual training hour requirements as listed on the Professional Standards Final Rule. This may not have the exact title that you might use on your resume, but it is important to make sure that you have the one that has the correct number of total required annual hours. You will be able to see the number of hours assigned to the Job Title you select here immediately after creating your account.	ACTION: Select Manager Job Title
Once your Job Title is selected, you need to select your State. The State field displays options for all U.S. States, U.S. Territories, Department of Defense areas, and Bureau of Indian Affairs sites. Each user may only select one state option.	ACTION: Select Indiana
Next you will need to select a School District. If the School District you need is missing, please send an email to cnpntab@usda.gov, so the district can be added to the list.	ACTION: Select Adams Central Community Schools

School Manager users will also need to select one or more schools at which they are working. Now that we have selected the School District, the Schools field is populated with all schools in the District.	
Clicking on the “Add New School” button displays a window that allows user to enter school information through six required fields: State or Territory, School District, School Type, School Name, City, and Zip.	ACTION: Click the Add New School Button
There is the ‘School Types Guidance Chart’ information link above the School Type field. It opens a document in a new browser tab which provides information on different school types available.	ACTION: Click the School Type link, and return to form showing data in the screen.
Filling in this screen will add a new school to the State and School District entered. Note that the State and School District default to the ones you selected for your Profile and are not editable.	ACTION: Fill out the fields: School = A Sample School; City = Adams; Zip = 45678. Click the Save button.
Now that the school has been added to the school list, it can be selected from the Schools field.	ACTION: Select the new school.
You can select multiple schools by using the Control or CTRL key and your mouse.	ACTION: Open the Schools list and show how to select two schools in a row, by selecting Shady Lane School and Swiss Valley School.
If you just want to select a single school, you would just use the mouse to make a single click. Notice how now only one school ends up being selected. If you want to select multiple schools, you need to hold down the Control key as you click with the mouse. The mouse will allow you to scroll and select, but the Control key allows you to hold onto the schoolss selected.	ACTION: Click on the value for Winchester Amish School to remove all the other visible selections.
We will go ahead and select two more schools. The first thing I do is to hold down the Control key. This will hold onto the first selected school. Then I will scroll up and select two more schools. Since the Control key was held, it keeps all selections. If we continue to hold the Control key, we can select as many or as few values as we need.	ACTION: Hold CTRL. Add Adams Central Elementary School and Adams Central High School. Then scroll back down to Winchester Amish School and back to the top.
For example, if I clicked the middle school instead of the high school by mistake, I would click the high school value again while I still have that Control key held down.	ACTION: Hold CTRL. Click the Adams Central High School value.
Then I select the Middle School I wanted while holding down the Ctrl key.	ACTION: Add Adams Central Middle School
If the Training Tracker has any Managers set for the schools you selected, they will be displayed in the Manager field. Manager is not a required field for this screen.	ACTION: Point to Manager field
Once all fields on the Create User Profile screen has been filled out, press the “Create” button at the	ACTION: Show with mouse ready to click Create button

bottom of the screen to save the information. This will now take you to the Professional Standards Training Tracker Tool Home screen.	
This concludes our example for creation of a School Manager user profile. The last section of this video will demonstrate some of the screens you will have access to after your user profile creation. As a reminder, please use the help email at cnpntab@usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen
Create a School Director User Profile	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be showing an example of how to fill out the profile screen for a School Director.	SCREEN: Show new Create User Profile
Set the Category to School.	ACTION: Select School in Category
The next field – Role - represents what role you have when using our Tool. If you are expected to monitor or manage training progress for the entire school district - then Director is what you should select for Role.	ACTION: Select Director in Role
The Job Title field is limited to the options which match the annual training hour requirements as listed on the Professional Standards Final Rule. This may not have the exact title that you might use on your resume, but it is important to make sure that you have the one that has the correct number of total required annual hours. You will be able to see the number of hours assigned to the Job Title you select here immediately after creating your account.	ACTION: Select Director in Job Title
Once your Job Title is selected, you need to select your State. The State field displays options for all U.S. States, U.S. Territories, Department of Defense areas, and Bureau of Indian Affairs sites. Each user may only select one state option.	ACTION: Select Indiana from the list for the State value.
Next you will need to select a School District. If the School District you need is missing, please send an email to cnpntab@usda.gov, so the district can be added to the list.	ACTION: Select Adams Central Community Schools
Once all fields on the Create User Profile screen has been filled out, press the "Create" button at the bottom of the screen to save the information. This will now take you to the Professional Standards Training Tracker Tool Home screen.	ACTION: Show with mouse ready to click Create button
This concludes our example for creation of a School Director user profile. The last section of this video will demonstrate some of the screens you will have access to after your user profile creation.	SCREEN: Show Sub Chapter Exit Screen.

As a reminder, please use the help email at cnpntab@usda.gov for any questions or challenges you have while using our website.	
Create a User Profile for a State User	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be showing an example of how to fill out the profile screen for a State user.	SCREEN: Show new Create User Profile
Set the Category to State.	ACTION: Set State in Category
The next field – Role - represents what role you have when using our Tool. If you anticipate that you will only ever log your own training records, select the Staff role. If you are expected to directly monitor or manage training progress for a group or are expected to log training for your employees - then Manager is what you should select for the Role. If you are expected to monitor or manage training progress for the entire State Agency - then Director is what you should select for Role.	
We are going to tackle the State Agency Staff role first.	ACTION: Select the value for Staff in Role
The Job Title field is limited to the options which match the annual training hour requirements as listed on the Professional Standards Final Rule. This may not have the exact title that you might use on your resume, but it is important to make sure that you have the one that has the correct number of total required annual hours. You will be able to see the number of hours assigned to the Job Title you select here immediately after creating your account.	ACTION: Select Job Title
Once your Job Title is selected, you need to select your State. The State field displays options for all U.S. States, U.S. Territories, Department of Defense areas, and Bureau of Indian Affairs sites. Each user may only select one state option.	ACTION: Select Indiana from list in State
If the Training Tracker has any Managers set for the State you selected, they will be displayed in the Manager field. Manager is not a required field for this screen.	ACTION: Point to the Manager field
Same fields are displayed for the State Agency Manager Role.	ACTION: Select the value for Manager in Role
For the State Agency Director Role the Manager field is hidden.	ACTION: Select the value for Director in Role
Once all fields on the Create User Profile screen has been filled out, press the “Create” button at the bottom of the screen to save the information. This will now take you to the Professional Standards Training Tracker Tool Home screen.	ACTION: Show with mouse ready to click Create button
This concludes our example for creation of a State user profile.	SCREEN: Show Sub Chapter Exit Screen.

The last section of this video will demonstrate some of the screens you will have access to after your user profile creation. As a reminder, please use the help email at cnpntab@usda.gov for any questions or challenges you have while using our website.	
Create a User Profile for a USDA User	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be showing an example of how to fill out the profile screen for a USDA user.	SCREEN: Show new Create User Profile
Set the Category to USDA.	ACTION: Set USDA in Category
The next field – Role - represents what role you have when using our tool. Only one Role – Manager – is available for USDA users.	ACTION: Select Role
The Job Title field is limited to the options which match the annual training hour requirements as listed on the Professional Standards Final Rule. For USDA, there are no required training hours. You'll also note only one Job Title is available- Manager.	ACTION: Select Job Title
Once your Job Title is selected, you need to select your FNS Office.	ACTION: Select FNS Office
If the Training Tracker has any Managers set for the FNS Office you selected, they will be displayed in the Manager field. Manager is not a required field for this screen.	ACTION: Point to the Manager field
Once all field on the Create User Profile screen has been filled out, press the "Create" button at the bottom of the screen to save the information. This will now take you to the Professional Standards Training Tracker Tool Home screen.	ACTION: Show with mouse ready to click Create button
This concludes our example for creation of a USDA user profile. The last section of this video will demonstrate some of the screens you will have access to after your user profile creation. As a reminder, please use the help email at cnpntab@usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen.
After Profile Creation Screens	SCREEN: Show Sub Chapter Intro Screen
In this section, we will show you how to find your profile details once you are logged into the Training Tracker Tool.	SCREEN: Show the Dashboard screen of a school employee profile
You can find your profile information under the 'Profile' option of the 'Welcome...your name' menu. When you click on Profile, you will see the User Profile screen populated with your information.	ACTION: Click on Profile under Welcome
To edit your profile information click the "Edit" button.	ACTION: Click on the Edit button.

When the Edit User Profile screen opens, it will look and act much like the Create User Profile screen that we just used. The set of fields displayed on this page wil depend on Category and Role selected. This is a Edit User Profile page for a School Employee.	SCREEN: Show Edit User Profile page for a School Employee
You can update your Hiring Date, Role, Job Title, and Manager selections. Changes submitted here will take effect immediately.	ACTION: Make an edit to the hiring date
Once we click the “Update” button at the bottom of the screen, the Tool will make the updates. This pop-up message is letting you know that the changes were successful, and that we are being taken back to the your User Profile screen.	ACTION: click update to show the pop screen.
As a reminder, please use the Contact Us menu item under the Help menu to email cnpntab@usda.gov for any questions or challenges you may have while using the Professional Standards Training Tracker Tool. Thank you for viewing!	SCREEN: Show Closing Frame

Chapter 3: Navigation, Help, and Home Page

Conversation	On Screen Action
[Music] Welcome to the Professional Standards Training Tracker Tool, training video series. This is Chapter 3: Navigation, Help, and Home Page. There are three sub-chapters to this video. We recommend this whole video be viewed by all users.	SCREEN: Show Chapter Title Screen Chapter Intro screen shown till the end of the "This is Chapter…." statement.
Navigation Overview	---- Navigation Overview ---- SCREEN: Show Sub Chapter Title Screen Subchapter Intro screen shown till end of statement "Navigation Overview"
This is the Home Page. We will go over this page in more detail later in the video, but let's look at the menu options first. There are six main menus available to all user categories and roles. These are, going from left to right Home, Training, Reports, Online Resources, Help, and Welcome.	SCREEN: Show PSTTT Home Page, logged in to the QA environment, with the richard123 school employee profile
Before we look at each of these in detail, we wanted to mention, for some of our users, that we have a skip navigation feature. If you tab onto the menu bar you will be given an option to skip the menu bar completely. Some users might find this useful. We will go ahead and look at those menu options in more detail now. We have two basic types of menus: those that are direct and those that have sub-menu options.	ACTION: Tab until the Skip to main content link appears. ACTION: Use mouse to point to the Skip Navigation option at the top of the page.

The Home menu option will return you to your Home Page from anywhere in the Tool. This is an example of a direct menu option. Activating this option is done with one click of the mouse, or by using the Enter key.	ACTION: Click on the Home option
The Training menu is next, and this is an example of a menu option with sub-menus. It has 2 sub-menus: Training History and Enter Training.	
With a mouse, you can hover over the menu to see the options.	ACTION: Hover over training with the mouse
With the keyboard controls, each page will bring the focus to the page content. You will use shift + tab to go to the left through the menus, or tab to go to the right. Once you are on the menu item you want use, the Enter key will activate the option selected.	ACTION: Use shift+tab, 3 times to get to Online Resources ACTION: Use tab to go to Help ACTION: Use shift+tab, 3 times to get to Training
You would select a sub-menu title by either clicking with the mouse, or selecting it with the up or down arrow keys and using Enter. All menus with sub-menu options will work in the same way.	ACTION: Click on the Training History link
We have gone ahead and selected the Training History. This page displays the trainings that have been recorded by you, for this current school year. There is a school year dropdown that will allow you to select other school years. Please note, that the school year begins each year on July 1, so, after that point this page will appear empty, until you enter in at least one training for the new school year.	ACTION: show with mouse the school year drop down as talking

The Enter Training screen is a form that allows you to log a training. This page is part of the core of our site, so we would invite you to see the video titled ‘Chapter 4.0: Adding, Editing, or Deleting Training Records’ for a more detailed look. At a high level, this page accesses a database of training titles that have been provided by multiple sources.	ACTION: Click on Enter Training
If you start typing in the training field, you will see the training title options available that match what you type. You do not need to type the title exactly. The search will return any titles that contain the word you type, or a similar word anywhere in the title.	ACTION: Type the word “cook” into the training field. Select “Back to Basics: How to Incorporate Scratch Cooking Techniques Into Your School Kitchen”
Enter Training does have some dynamic page elements that only appear once you have selected a training title.	ACTION: Point to the Key Area... elements
There are a number of required fields that need to be filled in for each training. For example, each user must select at least one name from the employee table, even if that is the only name being shown. Managers would see more names here, and would be able to select multiple employees at once. When you enter a training on this screen, you will be returned to your Training History page, where you will see the training added to the page, under the correct school year.	SCREEN: Scroll down to show the bottom of the page
Going back to our menu bar, we will click on the Reports option. This is a direct menu link that opens the Reports page.	ACTION: Click the Reports menu

There are multiple Report Types that can be selected. These are Detailed Report, Summary Report and the four specific summary reports: Summary Report by Key Area, Summary Report by Training Topic, Summary Report by Learning Objectives, and Summary Report by Training Title. The default is the Detailed Report, which provides a single line for each training logged for the people you select to include in the report. The various summary reports will usually provide one line for each person, for each school year.	ACTION: Open the Report Type drop down to show the different reports
At the top of the page area, there is a short summary for each report that will tell you	ACTION: Select the text at the top of the page
what to expect, and what the required fields are for that report.	
Here is the Summary Report.	ACTION: Change to Summary Report
When all required fields for a report are selected, you can use the View Report button to open the report results in a browser tab. Using the controls at the top left of the page, you can review and export the report results. The formats available include PDF, Excel, Word, and other formats.	ACTION: Click the View Report button
When you are done, you will want to click the Close button at the bottom of the report to return to the Report screen in the Professional Standards Training Tracker Tool . Back on the menu bar, our next menu option is Online Resources. Clicking on this option directly opens the Online Resources page.	ACTION: Click the Close button

The Online Resources page displays links to pages outside of the Training Tracker Tool that provide more information on Professional Standards, and other tools provided by the Food and Nutrition Service office.	ACTION: Click the Online Resources menu
The next menu option is Help. This menu has its own section in this video. Briefly, this menu has three sub-menu options: User Guides, Training Videos, and Contact Us. Please see the other section of this video for more details. The last menu option is the Welcome menu. The full name of this includes the logged in user, or your name. As you can see, our menu is 'Welcome, Richard Test Record'. This menu has two sub-options: Profile and Log out.	ACTION: Show the Help sub-menu options
When you click on Profile, you will see the User Profile page that summarizes your information. As you can see, we are using the Richard Test Record as our account for this	ACTION: Click on the Profile option
video. This screen also shows your date of hire, email, and manager information. Since this sample profile is for a School Employee, this screen displays their assigned school. For State or FNS users, this would show your state.	
This screen is read-only, however down at the bottom there is an Edit button. A user who has changed their school or from part-time to full-time might use this to update their profile.	ACTION: Click the Edit button
Only certain fields can be edited while you are logged into the system. These are the fields that are not grayed out.	ACTION: Change the hiring date

Many of the fields may be edited if you send in a request via either the Contact Us page, or the help email. Your First Name, Last Name and Business email are tied to your eAuthentication account and therefore can not be changed on the Professional Standards Training Tracker Tool. Changes submitted on this Edit page will take effect immediately, and will affect who can see you and your training records.	SCREEN: Scroll down slowly to show the page.
Once we click the update button at the bottom of the screen, the system will make the updates. This pop-up screen is letting you know that the changes were successful, and that we are being taken back to the Home page.	ACTION: Click the Update button.
The last menu option available is the ability to Log Out of the system. We are going to skip clicking at this time. If we had clicked that link, the USDA servers are set to try to automatically close your browser window. If you are using Microsoft Internet Explorer as your browser, the window will close. Users of other browsers will see a message, but it will not close your	ACTION: Use the mouse to highlight the Log out link under the Welcome menu
window. Either way, your account will be logged out. That wraps up our review of the six standard menu options. There are a few menus only available to certain roles or user categories that were not covered in this video. These will be covered in other videos in greater detail for those roles.	
As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen Show exit screen till entire statement is read.

Help Menu	---- Help Menu ---- SCREEN: Show Sub Chapter Title Screen. Subchapter Intro screen shown till end of statement “Help Menu”
In this section, we will be going over the Help menu option.	SCREEN: Show Home Page for richard123 in QA
This menu has three sub-menu options: User Guides, Training Videos, and Contact Us.	ACTION: Hover over the Help menu
The User Guide is an online user manual which is available for reading, or downloading as a pdf. You can print out certain pages, chapters or the whole manual if desired. The information in the user guide links to the role setting in your user profile. We have logged in as a sample School Employee, so the User Guide available is the standard Employee user guide. This guide is applicable for any Employee or Staff user. There is a separate User Guide for Managers and Directors that would be automatically available under their profile.	ACTION: Select the User Guide option
The next Help sub-menu is Training Videos. This page allows user to view all of the available training videos. There are multiple videos which cover broad topics for our system. All published videos appear on this	ACTION: Navigate back to PSTTT. Select Training Videos from Help menu.
page. The first two videos are also available via links on the Tool’s About page.	
Each video will play on this page. It might be helpful to resize the video window to fill your screen using the available Full Screen option at the bottom, far right.	ACTION: Push Play, and then pause. Circle the Full Screen button
There are additional video controls at the bottom of the video window such as the play/pause button,	ACTION: Point mouse at play/pause button

volume control,	ACTION: Point mouse at volume control
video time display,	ACTION: Point mouse at video timeline
closed captioning toggle,	ACTION: Point mouse at closed captioning
and settings, that may be useful. Your computer's video player software will also affect viewing. If there are any problems that are not fixed with the displayed controls, please request your computer's technical support team to help you.	ACTION: Point mouse at settings
Many of the videos are segmented by Sub-Chapters. You will see these as links under main chapter heading.	ACTION: Select the Chapter 4 video
Clicking on the main chapter link will play all sub-chapters.	ACTION: Point mouse at Chapter 4.0
Clicking on a sub-chapter link will allow you to jump to that section and skip over other sections in the same topic.	ACTION: Move mouse over sub-chapter links
Returning to the Help menu, we have one more sub-menu to go, Contact Us. The Contact Us page allows you send a message into the system administrators, so they can provide you help, or you might make suggestions for new functions or bug fixes. This page is customized to your account by default.	ACTION: Click on the Contact Us option.
The title here, is going to become the Subject line of the email that is sent to the system administrators. It should be a very short summary of the message.	ACTION: Point mouse at Title field
The Name and	ACTION: Point mouse at name
Email Address fields contain your information by default. These may be changed if you are sending a message for a different user.	ACTION: Point mouse at email address
The Phone Number field is optional.	ACTION: Point mouse at phone number field

The Message field will be the body of the email. Please use this field to give us as much detail as possible.	ACTION: Point mouse at message area
At the bottom there is a checkbox to use if this problem or help request is related to Section-508 or ease of use. Please check this box, if appropriate. Since this is a relatively simple form, we want to use this page to show the general idea of our field validation messages. Most fields on this page are required, and their field title ends with an asterisk character. In the page header area, we can find the message that lets us know that this means this field is required.	ACTION: Point mouse at Accessibility
If we try to use the Send Message field without making any changes to the page we will see two field validation messages appear. The first one is for the Title field. The message appears in red text, under or after the field to which it is linked. This one states, “The Title* field is required.” That field name is included so that you can find the exact field which has the problem. Until all screen messages are resolved, you will not be able to save, or in this case, transmit the information in the fields.	ACTION: Click the Send Message button
That wraps up our review of the Help menu.	
As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Exit Sub Chapter Screen Show exit screen screen till end of statement.
Home Page	---- Home Page ---- SCREEN: Show Sub Chapter Title Screen Subchapter screen shown till end of statement “Home Page” is spoken.

The Professional Standards Training Tracker Tool Home Page is your personal training dashboard, and is displayed when you log into Training Tracker Tool and also when you click the Home menu link.	SCREEN: Show Home Page ACTION: Point mouse at Home menu
The top of the page gives a very brief summary of what the site does.	ACTION: Select/highlight the top paragraph
In the center of the screen, is a line showing you the current date, how many days are left in the school year, and how many training hours you must take to meet your annual requirement.	ACTION: Use the mouse to select/highlight all the row
This area has a date countdown from July 1st of a year to the following June 30th. It tracks both the yearly required amount of training and the amount of training you have logged into the system, to give you a remaining amount of hours needed for the current school year.	ACTION: Leave row selected/highlighted
With this profile, we have a single training record completed for the 2018-2019 school year, on August 7, 2018, that was 15 mins or 0.25 hours in length. The screen shows that 9.75 more hours are needed, because it is subtracting that 0.25 hours from a 10 hour full time employee goal. Your goal amount is linked directly to the Job Title in your Profile.	ACTION: Leave row selected/highlighted
At the bottom of the Home Page, there is an area that will display the most recent 5	ACTION: Select/highlight the table in the Recent Training section.
training titles that were logged in. As training records are added, this table will change based upon the training titles logged. The most recent completion date is displayed at the top.	

Currently, this is showing training records completed based on school year. This concludes our review of the Home Page.	ACTION: Select/highlight, just the school year column in the recent training table
As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges you have while using our website. Thank you for viewing! [Music]	SCREEN: Show Exit Sub Chapter Screen Show exit screen till entire statement is read.

Chapter 4: Adding, Editing, or Deleting Training Records

Conversation	On screen Action
[Music] Welcome to the Professional Standards Training Tracker Tool, training video series. This is Chapter 4: Adding, Editing, or Deleting Training Records. Adding a Training Record In this section, we will look at how you would create a training record, and how you can see the impact within the other pages. The Professional Standards Training Tracker Tool's primary purpose is to allow users to create training records for use in annual reviews. These records can be created by the person who took the training, or by his/her manager. We will be using an Employee or Staff level account for this video. For our example, we will be showing the fictional account of Richard Test Record. Richard is a full-time School Employee, who has training records in both the current and previous school year. Here on the Homepage, you can see that there is a training record for the 2018-2019 school year that was 15 mins or 0.25 hours in length. This is the first line in the Recent Training table, and we have selected it here on the screen. If you were to look at the Training History page, this would be the only record showing up for the 2018-2019 school year. His screen shows that he needs 9.75 hours more, because it is subtracting that 0.25	SCREEN: Show Title Screen Chapter Title screen shown till the end of the "This is Chapter…." statement. ------Adding a Training Record------ SCREEN: Show sub-Title Screen Subchapter Intro screen shown till end of statement "Adding a Training Record" SCREEN: Show PSTTT Homepage, logged in to the QA environment, with the richard123 school employee profile ACTION: Use the mouse to highlight the rows in the Recent Training table. ACTION: Use the mouse to highlight the first line. ACTION: Select/highlight the line in the middle of the page.

hours from his 10-hour full-time employee goal. We are going to look more closely at that training record later, but we needed to make sure you were aware of what the Home and Training History pages were showing before we enter in a new record.	
To log in a training, go to the Training menu, select Enter Training. This page is available to all user accounts who have an eAuthentication login.	ACTION: Select Enter Training from the Training menu.
The Enter Training page is a form that allows you to record many of the details for the training. It will be helpful to have any training materials that were handed out, or the registration records available, so you can refer to them if needed.	
The header section lets you know that the required fields will be marked with an asterisk.	ACTION: Select the * line in the header
To enter a training record, you need to start typing a training title or a word that is in the training title, in the training title field.	ACTION: Click on the Training Title field.
The Training Title field will attempt to match what you enter to the ones that are already included in our database. It starts to search when you start typing in the training title.	
The training titles that we have for you to select from are from the Professional Standard Training Database and those added by users, so there is a good chance that our list might be missing a newly created training title. If this happens, you will need to use the Add New Training Title button, located below or after the Training Title field, to create a new training title to add to the Professional Standards Training Tracker Tool database.	ACTION: Point to the Add New Training Title button with the mouse

Please see the 'Creating a new training title' subchapter at the end of this video for more details on how to create a new training title. For now, let's go ahead and finish this page using an existing title. For our example, we are trying to record a training session for the"Fresh Fruit and Vegetable Program Webinar". So we will start by typing the word 'fresh' in the field'. The system found quite a lot of training titles with the word fresh in their title. We need to select the one that matches our materials. It is the 12th entry in this list. We can arrow down, or use the mouse to select the correct title. Selecting a title will add the full title to the field. It also has added some training details to several fields on the screen. The training titles are represented by combinations between Key Areas, Training Topics, and Learning Objectives. Once you select the Training Title, it adds a table to the screen where you may select one or more of the combinations shown. These are linked to the Training Title, and if you change or adjust the Training Title, this table will refresh and all selections will be lost. We will use the select checkbox that is just above the table, to select all available combinations. Scrolling down, the Training Provider, Training Hours, Training Minutes fields were filled in, when the training title was selected. If there is a discrepancy in the training hours/minutes in our system and how many hours/minutes your training provider said the training would	ACTION: Type the word fresh in the training title field. ACTION: Scroll down so the whole results field can be seen on the screen. ACTION: Circle around the new table ACTION: Check the 'Select all combinations in the table below' checkbox

fulfill, please add a new training title so that you have the correct time credit for the training you attended.	
The next field we need to work with is the Completion Date. This is the date on which the training was completed. This will default to the current date but can be changed.	ACTION: change training date to A few days in the past
The school year is a critical value. This will dictate where this is counted for the annual training goal. It is possible to add Training records retroactively for a school year.	ACTION: Select a school year value
At the bottom of the page, you must select at least one employee. Employee or staff level users will only see their name, however, managers or directors would be able to see multiple names in this table.	ACTION: select employee name
Once all of the required fields for the training have been filled out, you may press the save button at the bottom of the screen. The system will bring up a few confirmations and then it will redirect you to your training history page.	ACTION: Click the save button ACTION: Complete the dialog screens
The training history page will show you your training records by school year. The main part of the page will show you the Training Title, Completion date, and the length of training. As you can see the new training that we added now appears on this page for the current school year. This has been an example of entering a new training record. As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges you have while using our website.	
	SCREEN: Show Sub Chapter Exit Screen Show exit screen till the end of the statement.

Editing a Training Record	-------Editing a Training Record--------- SCREEN: Show sub-title Screen Subchapter title screen should be shown till end of statement “Editing a Training Record”
In this section, we will talk about editing an existing training record. We are starting on the Training History page. You can open the Training History page under the Training menu.	SCREEN: Resume showing Training History screen.
The training history page will show you your training records by school year. The training part of the page will show you the Training Title, Completion date, and the length of training.	ACTION: click on the training title for the newly added training
By clicking on a training title, you will be able to open the training details.	
The Training Details page allows you a summary view of the training information. Most of the information displayed is read-only, however there are some very useful buttons at the bottom of this page.	
The edit training button allows you to make small changes to the training record such as correcting a training completion date.	
The upload training documents button, allows you to attach electronic copies of documents or files that relate to the training.	ACTION: Point to the edit button
The delete training button, allows you to delete this training if it was entered in error. We will look at the delete button in another sub-chapter.	ACTION: Point to the upload docs button
We will now look at Editing a training record.	
The Edit Training page contains the same fields as the Enter Training page, however many of these are locked against changes. If	ACTION: Point to the delete button ACTION: click on the edit button

you need to adjust something that is locked, delete the training record and add a new training title with the correct information. Adding a new training title is discussed further in another sub-chapter. We will not be making any changes to this page so instead, we will use the cancel button at the bottom to return to the training details. You may have additional supporting documents to attach with the training you have recorded. Once you have electronic copies of the documents, you may use this upload document page to attach it. The document title field is a free text field that allows you to create a document name that will be displayed within the Professional Standards Training Tracker Tool. The document type drop-down allows you to select a category for this document. The browse button on the right-hand side allows you to search through your computer's files to find the document you want to attach. You can see the document that was attached show up on this page. This page allows you either add or delete documents attached to this training. Once we are done uploading documents we can return to the training details page. Now that we return to the training details you will also see that the uploaded documents can be viewed on this page as well. This has been an example of editing a new training record.	ACTION: scroll down on the page ACTION: Click the Cancel button ACTION: from the training detail page click the upload training documents button ACTION: Type in a value in the document title field ACTION: Select a value in the doc type drop down ACTION: Click browse and select a document. Click the upload button. ACTION: Point to the uploaded document. ACTION: Point to the document delete link ACTION: Click the return to training button ACTION: Point to the uploaded documents area

As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen Show exit screen till the end of the statement.
Deleting a Training Record	--------Deleting a Training Record--------- SCREEN: Show sub-title Screen Subchapter intro screen shown till the end of statement "Deleting a Training Record" is spoken.
In this section, we will discuss the steps and guidelines for deleting a training record. You may only delete a training record where you have 100 % ownership. When there is a clear ownership, this Training Details page will provide a delete button. If there is no clear ownership, this page will hide the delete button. Using this delete button will delete the entire training record as if it never happened, and it will be removed from the training history of every training participant. An example of when it might be appropriate to delete the training record is if the training was logged with a similar, but incorrect Training Title. Since the Training Title is a value that may not be edited, you would delete and then re-log the training with the correct Training Title.	SCREEN: Show the training details page ACTION: Point to the delete button
If a training record needs to be deleted for a one or more employee, a manager or director user will be able to work with the Edit button to remove the employee from the training record. This has been a discussion of deleting a training record.	ACTION: Point to the list of employees
As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges you have while using our website.	SCREEN: Show Sub Chapter Exit Screen Show exit screen till end of the statement.

Adding a New Training Title	-------Adding a New Training Title--------- SCREEN: Show sub-title Screen Subchapter screen shown till end of statement “Adding a New Training Title”
In this section, we will look at how to add a new Training Title. Earlier in this video, we referenced that it is possible that a training might be missing from the Training Title drop-down field. In order to add a new training title, you will need to have all the details of the training. Then, go to the Enter Training page.	SCREEN: Show the Enter Training Screen
Below the Training Title field, is a button that is labeled ‘Add New Training Title.’ Clicking this button, opens a series of pages that allow us to enter in the details needed to create a new training title.	ACTION: Click the Add New Training Title button
On the Enter Training Title Details page you will need to record the Training Title,	SCREEN: Show Enter Training Details screen ACTION: Fill in a training title
length of training, Training Provider, and the Training Format. The title used here will be displayed in the Training Title drop down field, on the Enter Training page.	ACTION: Fill in a length of training ACTION: Fill in a training provider ACTION: Fill in a training format
All fields on this page are required except for Training Format. Click on the ‘Proceed to key area selection’ button to continue.	ACTION: Click on the Proceed................ button
On the Select Key Areas page, you will need to click as many key areas as are covered by the training.	
You must select at least one Key Area, and click the ‘Proceed to training topic selection’ button to continue.. For our example, we are selecting all four options.	ACTION: Click on Key Areas ACTION: Click the Proceed......................................button

Each key area is divided into training topics. On the Select Training Topics page, you will need to select at least one training topic for each key area that you indicated on the last page.	ACTION: Click on one training topic for each key area
Once this page is complete, click on the 'Proceed to learning objective selection' button to continue.	ACTION: Click the Proceed... button
Each training topic is further subdivided into learning objectives. On the Select Learning Objectives page, you will need to select at least one learning objective for each training topic that you indicated on the last page.	ACTION: Click one learning objective for each group on the page
Once you are done, click the 'Proceed to preview all selections' button to continue.	ACTION: Click the Proceed... button
The Preview Training Title Details page will provide you a chance to see all of the information you have entered for this new training. This page allows you to review the data, and either go back and edit it, or you can click the Save button and save the information into the training title database.	ACTION: Click the Save button
Once we return to the Enter Training page, we can search for and find the new training title This has been an example of adding a new Training Title.	ACTION: Show the new training title in the list
As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges, you have while using our website.	SCREEN: Show sub-chapter exit screen Show exit screen till end of the statement.
Thank you for viewing! [Music]	SCREEN: Show Exit Screen

Chapter 5: Reports

Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is Chapter 5: Reports.	SCREEN: Show Title Frame.
The button to access the report feature in the Professional Standards Training Tracker Tool is located on the main menu bar. Clicking the Reports button opens a form that allows users to run reports on training data that has been entered into the tool.	SCREEN: Show Home page with the school employee test account logged in (Alla will set up). ACTION: Click on reports link.
You can select the report to be run from the Report Type drop-down. The default selection is the Detailed Report.	ACTION - Point to the Type of Report field.
A description for the report selected is displayed on the top of the screen. The description changes as you change Report Type selection.	ACTION: Change the report type to Summary Report so the description changes.
You can enter the search criteria into the set of fields that is different for each report. Most of the search criteria fields are not required, but those that are required are marked with an asterisk.	
No matter which report is selected, you will need to select one or more employees. Every user needs to select at least their own name in the Employees field to run a report.	ACTION: Select yourself in the Employees multiple select.
State and USDA users will be logged in to their state or FNS Region respectively. All active users in the state or region will be displayed in the Employees field.	ACTION: Zoom into Employees multiple select.
School users will be logged in to their District, which is filled in and not editable. Their schools will be listed in the Schools field.	ACTION: Zoom out, so School District, Schools, and Employees fields are visible.
School users can narrow down the employees listed in the Employees field by selecting one or more Schools.	ACTION: Click on one school, then press ctrl+click on another.
Click the Generate Report button to run the report. The results will be shown in the separate browser tab.	ACTION: Press Generate Report button.
Report Type is shown on the top of the report results page.	ACTION: Show the results page.
At the top left of the report's output are buttons that allow you to: Close the report browser tab,	ACTION: Show Close Report button, but do not click on it.
print the report,	ACTION: Click on Print Report button so Print dialog opens, then close the print dialog.
export report in CSV or Excel format,	ACTION: Click on Export Excel button, so Excel opens, then close it.
or view it as a PDF.	ACTION: Click on Export PDF button, so PDF opens, then close it.
Report results will be displayed in a table. The information displayed depends on the report type	ACTION: Click to sort.

selected. You can click on arrows in table headings to sort the table onscreen by that column's value.	
There are six different report types in the Tracker Tool.	SCREEN: Reports page with Detailed Report selected and no other search criteria entered.
The Detailed Report is the most extensive one, it allows the user to specify the most search options and returns the most detailed search results.	
Besides selecting the Employees, the search criteria fields include the Job Title, the Training Title, Key Area, Training Topic, Learning Objective, School Year, Date Completed, Training Hours, and Training Minutes. Checking the Show Document Uploaded checkbox will list the documents uploaded with every training found.	ACTION: Enter search criteria – Alla will provide the details once the account and test data is set up. Then press Generate Report button.
The Detailed Report provides a list of all Training Titles that have been entered into the Professional Standards Training Tracker Tool for each selected employee matching other search criteria selected.	SCREEN: results screen. Zoom in to the left, so 3-4 rows are visible, then pan slowly to the right to show all columns.
The Summary Report is the most concise one, it allows the user to specify the least search options and returns less detailed search results.	SCREEN: Reports page with Summary Report selected and no other search criteria entered.
Besides selecting the Employees, the search criteria fields include only the Job Title, School Year, Training Hours, and Training Minutes.	ACTION: Enter search criteria – Alla will provide the details once the account and test data is set up. Then press Generate Report button.
The Summary Report provides summary training information for each selected employee matching other search criteria selected.	SCREEN: results screen. Zoom in to the left, so 3-4 rows are visible, then pan slowly to the right to show all columns.
Summary Report by Key Area, Summary Report by Training Topic, Summary Report by Learning Objective, and Summary Report by Training Title are very similar to the Summary report.	SCREEN: Reports page with Summary Report by Key Area selected and no other search criteria entered.
Each of these reports extends the Summary Report by one "extra" search criteria field. For example, Summary Report by Key Area allows you to select a Key Area value.	ACTION: select a value, click on All Employees, press Generate Report button.
The report will list the "extra" search criteria value	SCREEN: results screen. Zoom in to the title and the value in parentheses below it.
and display the same set of information as the Summary Report.	SCREEN: Zoom in to the left, so 3-4 rows are visible, then pan slowly to the right to show all columns.
This concludes our look at the Tracking Tool's reports.	
As a reminder, please use the Contact Us menu item under the Help menu to email cnpntab@usda.gov for any questions or challenges you may have while using the Professional Standards Training Tracker Tool. Thank you for viewing!	SCREEN: Show Closing Frame.

Chapter 6: Manager/Director Function: Employee List and View Logged Training

Conversation	On screen Action
[Music] Welcome to the Professional Standards Training Tracker Tool, training video series. This is Chapter 6: Manager/Director Function: Employee List and View Logged Training. The manager and director roles in the Professional Standards Training Tracker Tool have access to additional functions not available to the standard employee or staff users. Most of these functions are available in the Employees menu that will be visible when a manager or director logs into the Training Tracker Tool. Setting up a manager or director profile in the the Training Tracker Tool allows the system to automatically find those employees or staff that match up to your own. In this way, a new manager or director would be able to inherit all of the employees in a school or organization when they start their new job without having to manually move all the records. If we take a moment to review the profile for this manager that has been used for this video, we see that this is a school manager assigned to multiple schools. State director or FNS manager level users would be able to see their state or office on this same profile page. The School Director role has the unique ability to see all school employees that are in their assigned school	SCREEN: Show Title Screen Title screen shown till end of the statement "This is Chapter….." SCREEN: PSTTT homepage with school manager account, paula123, logged in ACTION: Point to the Employee menu ACTION: click on welcome user menu, and then on profile

district, for them this page will show just the school district name. Managers and directors are not able to see employees who are outside of their own school, district, or organization listed in profile. By clicking on the Employees menu you will see a listing of five sub menus. The sub menus are Employee List, Print Certificates, Create User Profile, Search Employees, and View Logged Training. This video will look into the employees menu specifically at the Employee List and View Logged Training pages. For a manager or director, selecting the Employee List option will open a screen dedicated to showing a listing of employees. As a manager or director, you will be able to edit profile details, record training, and print reports and certificates, for all employees listed on this page. The information provided on this screen is provided based on a school year. At the top of the page, you can see this school year control defaults to the current school year but may be changed to the prior and next school year. The information grid on the page provides one line for each employee name. These rows show some employee profile information and the employee training goal progress for this school year. As mentioned before the employees shown on this page are automatically placed here because of their connection to the key	ACTION: click on the employees menu ACTION: click on Employee List SCREEN: Show Employee List page ACTION: click on school year field and show values ACTION: Point to a name in the grid

elements in the manager's or director's profile. This includes seeing other managers at the same schools or directors in the same district. The system will show you all people who are equal to your authority or lower on this screen. By clicking on an employee name you will drill into that employees record. This user profile screen showing the employee information would allow the manager or director to edit the employee profile details or to click through into this employee's individual training record. This screen looks and acts just like your own personal training history but it is set up to show you a single employee. To look at a bigger picture we would look at the view logged training page. The View Logged Training page provides a high-level view of all the training that has been reported in the Professional Standards Training Tracker Tool that relates to the employees you see in your Employee List. This page is governed by the school year. If we were to change the school year to the previous value it will change what is shown on the screen. The data grid on this page is set up by training title and completion date and lists all employees who are selected for that training record. By clicking on the name of the training you'll be taken to the training summary page which	ACTION: click on employee name SCREEN: Show employee User Profile ACTION: Point to the Edit button ACTION: Click the training history button SCREEN: Show employee Training History ACTION: Select the View Logged Training option in the Employees menu SCREEN: Show View Logged Training ACTION: change school year to 2017 option SCREEN: Show Training Details ACTION: click on a training title

would allow the manager or director to further drill in and edit the training record, upload training documentation for the training record, or to delete the training record. There is one important difference between how a manager or director creates or edits a training record versus an employee. Lets click the edit button on this training. The differences that we will show you on this page also appears on the enter training page. At the bottom of the page, you will see an Employee selection grid. This grid displays all of the names that would appear on your Employee List page. In contrast, an employee would only see their own name here. By selecting and deselecting the checkboxes you are adding to or removing the employees from the training. Any changes saved to this training record would take place immediately and would affect other screens within the Training Tracker Tool. Because school managers can have multiple schools in their profile, they show up in this selection list multiple times - but should only be selected once. School Managers and Directors also have a school filter box. This allows them to narrow the Employee List down below by specific schools. This has been a walkthrough of the View Employee List and View Logged Training pages for managers and directors. As a reminder, please use the help email at	ACTION: click the edit button SCREEN: Show employee Edit Training ACTION: Scroll down on the page ACTION: Select a checkbox next to Paula ACTION: Show with mouse where Paula shows up multiple times, and then make sure the name is selected only once ACTION: Use the Filter box to only show "Frost" school SCREEN: Show Exit Screen
cnpntab@fns.usda.gov for any questions or challenges, you have while using our website. Thank you for viewing! [Music]	Exit screen remains till the end of the statement.

Chapter 7: Manager Function: User Profiles

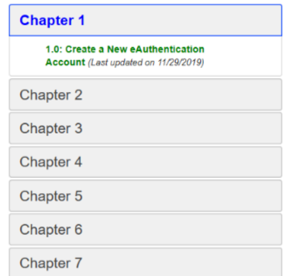
Conversation	On screen Action
[Music] Welcome to the Professional Standards Training Tracker Tool training video series. This is Chapter 7: Manager Function: User Profiles.	SCREEN: Show Title Screen Title screen shown till end of the statement " This is Chapter….."
The manager and director roles in the Professional Standards Training Tracker Tool have access to additional functions not available to the standard employee or staff users.	SCREEN: PSTTT homepage with school manager account, paula123 logged in the QA environment
Most of these functions are available in the employees menu that will be visible when a manager or director are logged into the Training Tracker Tool.	ACTION: Point/ circle to the Employee menu
Setting up a manager or director profile in the Professional Standards Training Tracker Tool allows the system to automatically find those employees or staff profiles that match up to the manager or director profiles. In this way, a new manager or director would be able to inherit all of the employees in a school or organization when they start their new job without having to manually move all the records.	
The search employees page provides a way of looking for employees within your profile's organization or school group. This can be useful if the list of employees you might oversee is quite long.	
The page allows you to type in Profile elements - either the name or the school or organization name - and match with those existing records. The results of each search will display in the table on the page. Each name returned is hyperlinked to allow you to go directly to the user profile.	ACTION: click on the search employees SCREEN: Show Search Employees page ACTION: Type in a search for one of the names shown, and click the search button.

The print certificates page allows you to find those employees that have already attained the minimum required training hours for the school year. At the start of each new school year, this page will be empty. When an employee has met their required training hours, their name will appear on this page. Once their name appears you have the option of printing a completed certificate for them. You may use the school year selection box at the top of the page to print certificates for each school year. To print certificates, select one or more employees by clicking the checkbox next to the name. We will be looking at the Create User Profile page next. Before we go through this page we need to talk about the differences between a login user and a non-login user. Any school nutrition professional is welcome to create a new eAuthentication account for the Professional Standards Training Tracker Tool. By creating a login account, they will provide themselves with a way for their logged trainings to follow them from one position to another or from one school, district, or organization to another throughout their career. As a manager or director, you will find there's no difference in the entering training or reporting functions between a login account employee and a non-login account employee. There is a small difference in the amount of information you're able to edit on the employee's profile. To create a non-login account, use the Create User Profile page under the employees menu. It is important to remember that	ACTION: click on print certificates SCREEN: Show Print Certificate page ACTION: Show with mouse where you would select year ACTION: show couple of users with checkbox clicked ACTION: click on create user profile SCREEN: Show Create User Profile pag

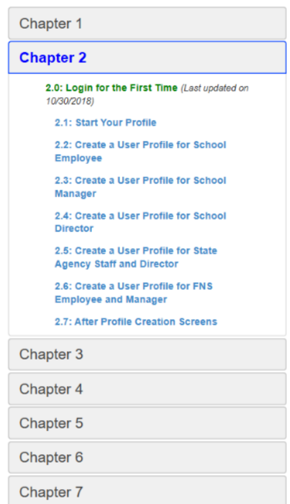
these accounts are not able to be converted to login accounts. Any training information added to these accounts is only available to the managers or directors of the organization and is not available to the individual employee. Looking at the Create User Profile page you will be able to set many of the same fields that you set for your own profile, as well as the first name, last name, and email address for the user. The non-login user accounts created in this fashion must match manager's or director's m profile. For example, a school manager may only create school employees for the same schools in their profile, and the state agency manager would only be able to create staff for their own state agency. For this reason, some of the fields have been pre-selected with values that may not be changed. By clicking the Create button at the bottom of the page you will be taken back to your Employee List page, where you will be able to see the new profile. As a reminder, please use the help email at cnpntab@fns.usda.gov for any questions or challenges, you have while using our website. Thank you for viewing! [Music]	

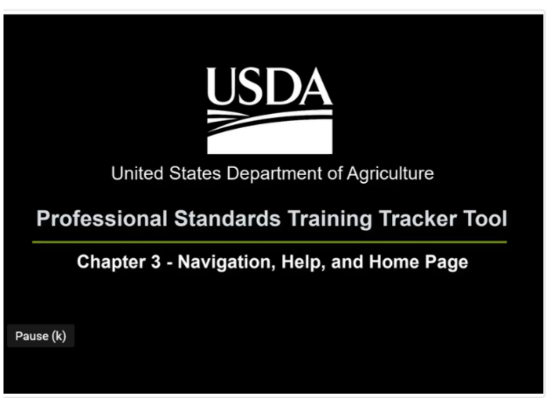
Training Video Screenshots

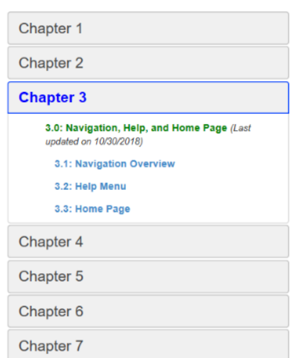
Training Video

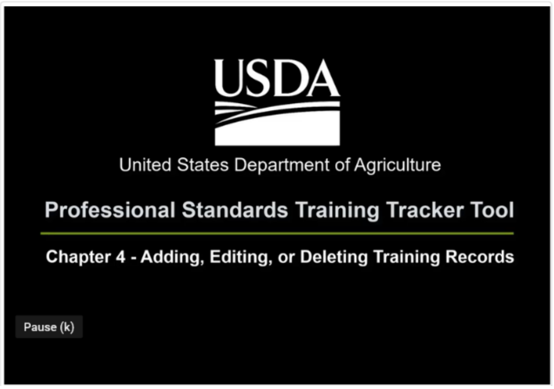


Training Video









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- **Chapter 4**
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    - 4.1: Adding a Training Record
    - 4.2: Editing a Training Record
    - 4.3: Deleting a Training Record
    - 4.4: Adding a New Training Title
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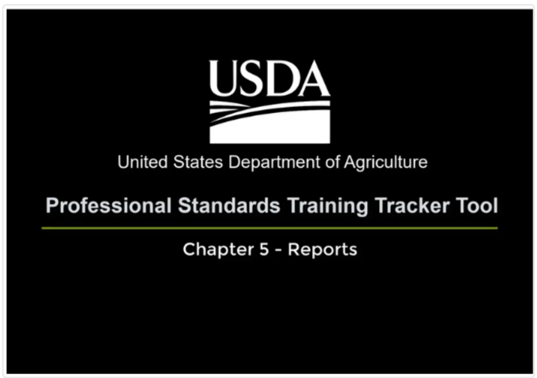
Training Video



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  - **6.0: Manager/Director Function: Employee List and View Logged Training** *(Last updated on 10/30/2018)*
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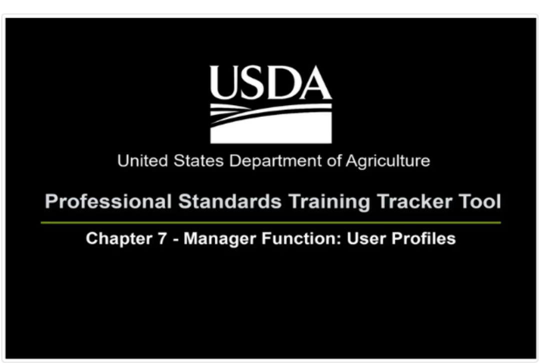
Training Video



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- **Chapter 7**
  - **7.0: Manager Function: User Profiles** *(Last updated on 10/30/2018)*