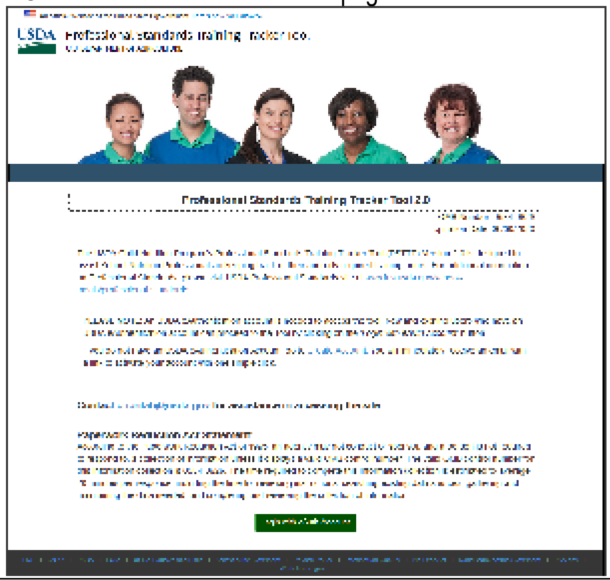
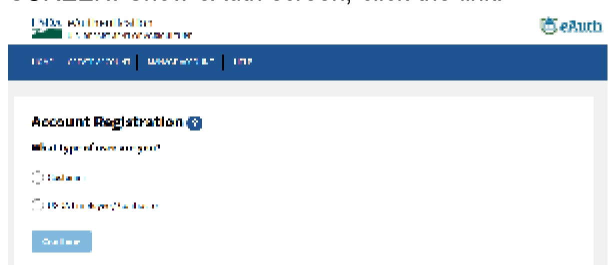
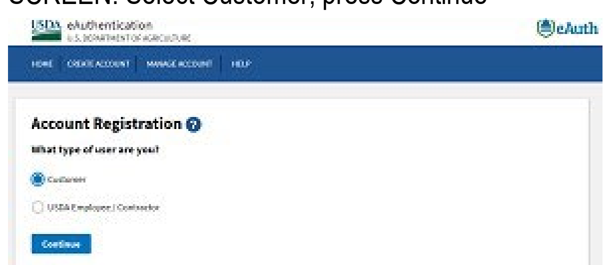
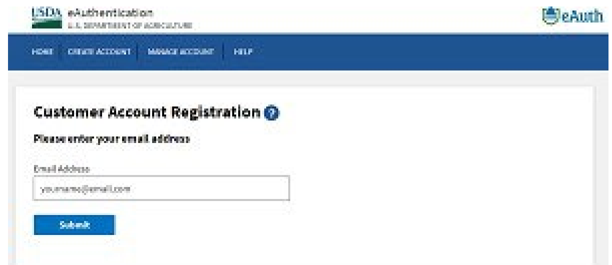
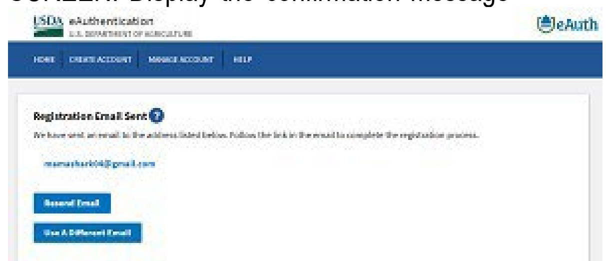
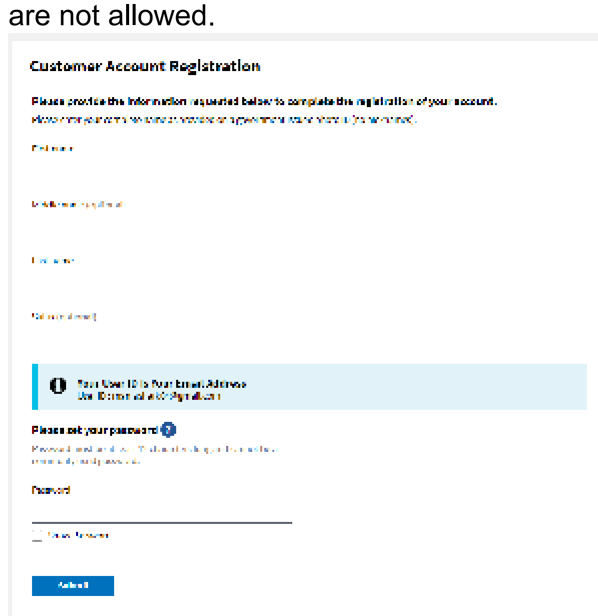
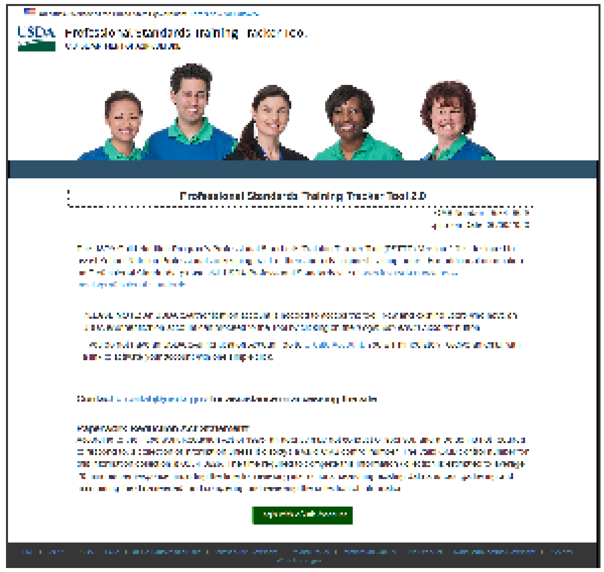
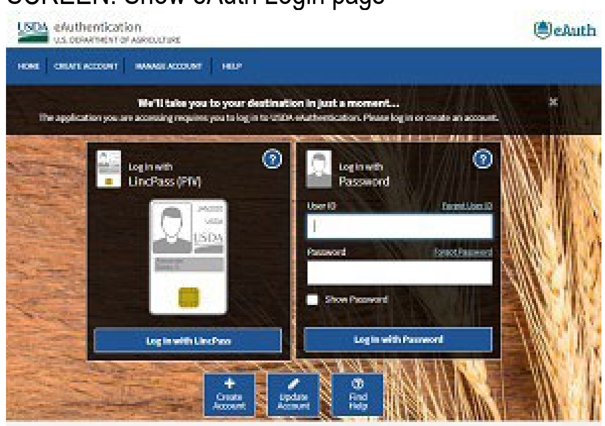
APPENDIX C: Professional Standards Training Tracker Tool (PSTTT) Training Videos Transcripts

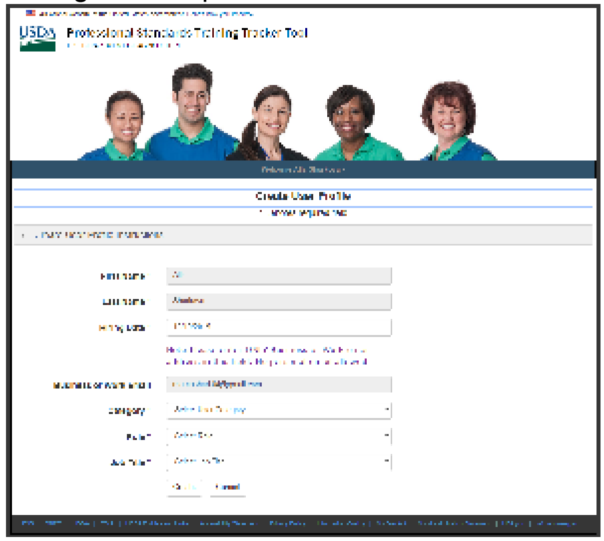
Contents

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 

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. 

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.	SCREEN: Show Customer Account Registration page 
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.	SCREEN: Show About page, press the “Login with eAuth Account” button 
It will redirect you to the eAuthentication Login page. Enter your user id and password to access the Professional Standards Training Tracker Tool.	SCREEN: Show eAuth Login page 

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 Sub Chapter Intro Screen
Start Your Profile	SCREEN: Show Title Frame
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 field. Manager is not a required field for this screen.	ACTION: Point to the Manager field
Once all fields on the Create User Profile screen have 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 schools 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 Control 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.
Once You Are Logged In	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
Welcome to the Professional Standards Training Tracker Tool training video series. This is Chapter 3: Navigation, Help and Dashboard Page.	SCREEN: Show the Title Frame
Navigation Overview	SCREEN: Show Sub Chapter Intro Screen
This is the “Dashboard” page. We will go over this page in more detail later in the video. Let’s look at the menu options first. There are five main menus available to all user categories and roles: “Home”, “Training”, “Reports”, “Help”, and “Welcome.”	SCREEN: Show PSTTT “Dashboard” page, logged in with **EmployeeLogin - a school employee profile** ACTION: Highlight the menus as they are named
There are two basic types of menus in PSTTT: direct menus that act like buttons, and those that have sub-menu options.	
The “Home” menu option will return you to the “Dashboard” page from anywhere in the Tool. This is an example of a direct menu, and it acts like a button. The “Reports” menu is also a direct menu option. Activating these options is done with one click of the mouse, or by using the Enter key.	ACTION: Click on the Home option
The “Training” menu has two sub-menus: “Log Training” and “Training Title List.” The corresponding pages allow you to log a new training record, and view and manage training titles. This functionality is described in detail in a separate video titled “Chapter 4: Adding, Editing, and Deleting Training Records and Training Titles.”	ACTION: Click on Training menu to expand, zoom in so options are clearly visible, highlight the sub-menus
The “Reports” menu brings up the “Reports” page which is a form that allows users to configure criteria and run reports on training data that has been entered into the tool. The “Reports” page functionality is described in a separate video titled “Chapter 5: Reports.”	ACTION: Click on Reports menu
The next menu option is “Help.” This menu has its own section in this video. Briefly, this menu has four sub-menu options: “Online Resources”, “User Guide”, “Training Video”, and “Contact Us.” Please see the corresponding section of this video for more details.	ACTION: Show the Help sub-menu options
The last menu option is the “Welcome” menu. The full name of this menu includes the name of the user logged in, or your name.	ACTION: Show the Welcome menu
This menu has four sub-menus: “My Training History”, “Print My Certificates”, “User Profile”, and “Log Out.” These sub-menus allow you to view your training history, print your training certificates, view and edit your user profile, and log out of PSTTT. This functionality is described in a separate video titled “Chapter 2: Login for the First Time.”	ACTION: Show the Welcome sub-menu options
This concludes our review of the five standard menu options.	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.	
Help Menu	SCREEN: Show Sub Chapter Intro Screen
In this section, we will be going over the “Help” menu option.	SCREEN: Show PSTTT Dashboard page, logged in with **EmployeeLogin - a school employee profile**
This menu has four sub-menus: “Online Resources”, “User Guide”, “Training Video”, and “Contact Us.”	ACTION: Hover over the Help menu
“Online Resources” sub-menu opens the “Online Resources” page that displays links to pages outside of the Professional Standards 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 sub-menu, show the Online Resources page
The “User Guide” sub-menu opens an online user manual in PDF format which is available for reading, downloading and printing.	ACTION: Select the User Guide option, show the PDF
The user guide linked in this sub-menu corresponds to the Role you have set in your User Profile.	ACTION: On PDF title page highlight Employee User Guide
The next sub-menu is “Training Video.” The “Training Video” page allows user to view all available PSTTT training videos. The first two videos are also available via links on the Tool’s “About” page.	ACTION: In Help menu, show the Training Video option, then click on it
Each video will play within the “Training Video” page. It might be helpful to resize the browser window to fill your screen using the available Full Screen option at the bottom, far right.	ACTION: Push Play, and then pause. Highlight the Full Screen button
There are additional video controls at the bottom of the video window such as the “Play/Pause” button, volume control, video time display, closed captioning toggle, and settings.	ACTION: Point mouse at each control
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: Click on the Chapter 4 accordion
Clicking on the main chapter link will play all sub-chapters.	ACTION: Point mouse at “4.0: Adding…”
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 to send a message to 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 **Off-screen, edit the Email Address field, so it is not populated with Alla’s email**
The “Title” field 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" field is pre-populated with your name,	ACTION: Point mouse at name
and "Email Address" field contains your email by default. These will be used to contact you and 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 become 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 that should be used if this problem or help request is related to Section 508 or ease of use. Please check this box, if appropriate.	ACTION: Point mouse at Accessibility
Since this is a relatively simple form, we would like to use this page to demonstrate the general idea of our field validation messages. Most fields on this page are required, and their field title ends with an asterisk character.	ACTION: Point out the asterisks
In the page header area, we can find the message that lets us know that this means this field is required.	ACTION: Highlight the message
If we try to press the "Send Message" button without making any changes to the page we will see two field validation messages appear.	ACTION: Click the Send Message button
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." The field name is included so that you can find the exact field which has the problem. Until all validation messages are resolved you will not be able to save, or in this case, transmit the information in the fields.	ACTION: Highlight the message
This concludes our review of the "Help" menu. 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
Manager and Director Menu Options	SCREEN: Show Sub Chapter Intro Screen
Users with the Manager and Director roles have access to a few additional menu options.	SCREEN: Show PSTTT "Dashboard" page, logged in with **DirectorLogin - a school director profile**
The "Training" menu for Managers and Directors includes three additional sub-menus.	ACTION: Click on Training menu to expand, zoom in so options are clearly visible, highlight the sub-menus
"View Logged Trainings" allows Managers and Directors to view and manage existing training records for their employees.	
"Upload Bulk Training Records" allows Managers and Directors to upload bulk training records for their employees.	
"Generate Training Titles List" brings up a list of all training titles available in PSTTT in Microsoft Excel format.	

This functionality is described in a separate video titled “Chapter 7: Manager and Director – Trainings and Other Functionality.”	
The “Help” menu for Managers and Directors includes the additional “Report an Issue” sub-menu that allows the user to report an issue within the PSTTT application.	ACTION: Click on Help menu to expand, zoom in so options are clearly visible, highlight the sub-menu
The “Report an Issue” page is a form with the following fields:	ACTION: Show Report an Issue page
The “Summary” field should be used to summarize the issue you are encountering.	ACTION: Type in a value, for example, “Unable to find my training”
Describe the issue and the steps for USDA to follow in order to recreate the issue in the “Description” field.	ACTION: Type in a value, for example, “The Logged Trainings page for 2019-2020 school year does not list the Knife Skills training I recorded for myself”
The “Name” and “Email Address” fields contains your name and email by default. These will be used to contact you and can be changed if you are sending a message for a different user.	ACTION: Point mouse at Name and Email fields **Off-screen, edit the Email Address field, so it is not populated with Alla’s email**
You can attach files with more details using the “Browse” button.	ACTION: Point mouse at the Browse button
Press the “Create” button when ready to submit your issue for review. Your issue will be logged, and you will see the confirmation dialog.	ACTION: Press Create button, show the dialog.
Back to the menu bar, the “Employees” menu is available to Manager and Director users only. It has the following sub-menus: “View Employee List”, “Search Employees”, “Print Certificates”, “Create User Profile”, “Upload Bulk Employee Profiles”, and “Deactivate Employees.”	ACTION: Click on the Employees menu to expand, zoom in so options are clearly visible, highlight the sub-menus
These sub-menus allow you to view your employee list, search for employees, print employee training certificates, create employee user profiles, and deactivate employees. This functionality is described in a separate video titled “Chapter 6: Manager and Director - Employees Functionality.”	
The other two options under the “Employees” menu – “Manage Schools” and “Generate School List” – are available to School Manager and Director users only.	ACTION: highlight the two sub-menus
Additionally, for School Director users, there is a “Manage School Districts” sub-menu. This functionality is described in a separate video titled “Chapter 8: School Manager and Director Functionality.”	
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
PSTTT Dashboard	SCREEN: Show Sub Chapter Title Screen
The Professional Standards Training Tracker Tool	SCREEN: Show Dashboard page,

"Dashboard" page is your personal training dashboard and is displayed when you log into Training Tracker Tool and also when you click the "Home" menu.	logged in with **DirectorLogin - a school director profile (training hours not completed)** ACTION: Point mouse at Home menu
The "Dashboard" page displays the application Welcome greeting and a small introduction paragraph on the purpose of PSTTT.	ACTION: Highlight the title and top paragraph
In the center of the screen, you will find current date to the left and the training calendar countdown – how many days are left in the school year, and how many training hours you must complete to meet your annual training requirement.	ACTION: Highlight the row
With this profile, we have two trainings logged for the current 2021-2022 school year, that total 8 hours in length. The calendar countdown shows that 4 more hours are needed, because it is subtracting the completed 8 hours from a 12-hour goal. Your goal amount is linked directly to the Job Title in your Profile.	ACTION: highlight to show what is being talked about here
For an employee who has completed their training hours, a Congratulations! Message is displayed. There is also the "Print Certificate" button that prints your training certificate for the current school year. The training certificates are described in a separate video titled "Chapter 2: Login for the First Time."	SCREEN: Show Dashboard page, logged in with **EmployeeLogin - a school employee profile (training hours completed)** ACTION: Highlight the row
Below the calendar countdown there are the training reward badges earned by you in the current school year.	ACTION: Highlight the badges
To earn a badge for a particular Key Area for a school year, the user needs to complete two trainings covering topics from that key area.	ACTION: Zoom in and highlight the two badges to the right
At the same time, a user earns a cumulative achievement badge, which reflects the number of Key Area badges earned: a Bronze badge for one Key Area badge earned, Silver for two, Gold for three, and Platinum for four.	ACTION: Highlight the badge on the left
Finally, at the bottom of the "Dashboard" page, there is an area that displays the most recent 5 training titles that were logged. As training records are added, this table will change to display the five most recent trainings logged.	ACTION: Select/highlight the table in the Recent Trainings section
This concludes our look at the Dashboard functionality in the Professional Standards Training Tracker Tool. 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 Sub Chapter Exit Screen
	SCREEN: Show Closing Frame

Chapter 4: Adding, Editing, or Deleting Training Records

Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is “Chapter 4: Adding, Editing, and Deleting Training Records and Training Titles.”	SCREEN: Show Title Frame.
Your Training Status	SCREEN: Show Sub Chapter Intro Screen
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 their manager. In this section, we will be talking about viewing your training status.	SCREEN: Show Home page with the user logged in
We are logged in as a “School Food Authority - All Other Staff (20 or more hours/week)” employee who has training records in both the current and previous school year.	
The “Home” page is showing up to 5 of the most recent trainings listed by School Year and shown in reverse chronological order by Date Completed.	SCREEN: Highlight the Date Completed Column.
In this example, there is a training record for the 2022-2023 school year, and four records for the previous school year.	SCREEN: Highlight the school year value for the one training, and then for the group of 4 trainings.

7/21/2022

You Have 344 Days To Complete 5.75 Hours of Training.

Recent Trainings (up to 5 latest trainings taken):

Training	School Year	Date Completed	Hours Completed
KNIFE CUTTING TECHNIQUES	2022-2023	7/21/2022	00:15
ANNUAL BACK TO SCHOOL TRAINING - ALL EMPLOYEES	2021-2022	10/21/2021	03:30
KNIFE CUTS FOR THE SCHOOL KITCHEN	2021-2022	10/21/2021	01:00
ALLERGY AND ANAPHYLAXIS	2021-2022	10/6/2021	01:00
CDE NSD COVID 19 UPDATE	2021-2022	10/4/2021	01:00

Conversation	On-screen Action
The status message tells you whether your training hours for the current year have been completed.	SCREEN: Highlight the “You have XX days to complete…” message.
Another way you can view your training status in more detail is from “My Training History” page. You can access it by selecting the “My Training History” option under the “Welcome” menu.	ACTION: Click on the Welcome / My Training History menu. SCREEN: Display My Training History page.
Your “Training History” page displays your job title,	SCREEN: Highlight “School Food Authority - All Other Staff (20 or more hours/week)”
the number of required training hours,	SCREEN: Highlight “6 training hours are required for”
and the “School Year” drop-down that defaults to the current school year.	SCREEN: Highlight the drop-down with 2022-2023 selected.
You can view trainings for each school year by selecting it in the drop-down.	ACTION: Select 2021-2022, show page change to display 4 trainings.

The total number of hours for the school year is displayed at the bottom.	SCREEN: Highlight the total.
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.
Viewing Training Record Details	SCREEN: Show Sub Chapter Intro Screen
In this section we will explore how to view your training record details.	SCREEN: Show My Training History page.
You can view details for each training by clicking on its title.	ACTION: Click on “ALLERGY AND ANAPHYLAXIS”.
The “Training Details” page shows all information available for the training:	SCREEN: Show Training Details page.
the Training Title,	SCREEN: Highlight Training Title.
the Learning Objectives covered along with their corresponding Key Areas and Training Topics,	SCREEN: Highlight Training Categories table.
the Training Provider and Training Format,	SCREEN: Highlight Training Provider and Training Format.
and the Completion Date and the School Year this training was logged for.	SCREEN: Highlight Completion Date and School Year.
The Training Length is listed – and this is the number of hours that is added to the tally of your training hours for the school year selected.	SCREEN: Highlight Training Length.
Finally, Comments, if any, and all Employees who participated in this training session are listed.	SCREEN: Highlight Employees.
From the “Training Details” page, based on your permission level, you can: edit the training, upload training documents, and delete the training. We will discuss these topics in detail later in this video.	
You can also use the “Back to List” button to return to the “Training History” page.	ACTION: Click the button. SCREEN: Show My Training History page.
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.
Browsing Available Training Titles	SCREEN: Show Sub Chapter Intro Screen
In this section we will learn to browse all available training titles.	SCREEN: Show Home page.
Each training record is logged by first selecting a training title. To browse available Training Titles, select the “Training Title List” option under the “Training” menu.	ACTION: Click on the menu.
In the Professional Standards Training Tracker Tool, a training title is a particular training, or set of training materials that can be used for a training session. The “Training Title List” page lists all available training titles within the PSTTT.	SCREEN: Show Training Title List page
A training title is defined by the combination of its title, provider, and training format.	SCREEN: Highlight the corresponding column headers.
You can narrow down the training titles displayed by typing in one or more keywords that match the title or provider into the “Search” field.	SCREEN: Highlight the Search field.
For example, if we are trying to locate a Civil	ACTION: Type “civil rights” into the Search

Rights class, we would enter “civil rights” into the “Search” field.	field.
As you type, the page will be refreshed to display only the training titles that match your keywords.	SCREEN: Records displayed in the table change.
You can go through the results displayed using the pagination controls at the bottom of the page,	ACTION: Click on page 3. SCREEN: Show page 3.
or you can further narrow-down your search by typing more keywords. For example, if this class was offered by the Institute of Child Nutrition or ICN, you can type “icn” in the search field.	ACTION: Add “icn” so the Search field now says “civil rights icn”. SCREEN: Records displayed in the table change.
Now you can review the Training Format and Training Length for each of the training titles listed to find a match.	SCREEN: Highlight Training Format and Training Length columns.
If still more information is needed, you can click on the training title to view its full details.	ACTION: Click on a title “CIVIL RIGHTS AND CN PROGRAMS ”.
The “Training Title Details” page shows all information available for the training title:	SCREEN: Show Training Title Details page.
the Training Title, Training Length, Training Format, Training Provider, Additional Information, and Created Date (if available).	
All the Learning Objectives covered along with their corresponding Key Areas and Training Topics are also listed.	SCREEN: Highlight Training Categories table.
From the “Training Details” page, based on your permission level, you can edit and delete the training title – we will discuss these topics in detail later in this video.	SCREEN: Highlight these buttons.
You can also use the “Back to List” button to return to the “Training Title List” page populated according to the search keywords you previously entered.	SCREEN: Highlight the button.
And you can also use the “Log Training” button on the “Training Title Details” page to log a new training record.	SCREEN: Highlight the button.
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.
Adding a Training Record	SCREEN: Show Sub Chapter Intro Screen.
In this section we will learn to add a training record.	NOTE: We are continuing from the CIVIL RIGHTS AND CN PROGRAMS Training Title Details page. SCREEN: Show Training Title Details page.
There are two ways to add a training record. The first is to locate a training title and press the “Log Training” button on the “Training Title Details” page.	ACTION: Click on the Log Training button.
The “Log Training” page is a form that allows you to record a training session. It will be helpful to have the corresponding training materials available to be referred to as needed.	SCREEN: Show Log Training page.
When a training title is already selected, some fields in the form are pre-populated with the training title details and are not editable. These	SCREEN: Highlight the fields.

fields are: “Training Provider”, “Training Format”, and “Training Length”.	
The “Training Categories” section is populated with all Learning Objectives available for the training title selected, listed by Key Area and Training Topic.	SCREEN: Highlight the Training Categories section.
The second way to add a new training record is to select the “Log Training” option under the “Training” menu.	ACTION: Click on the menu.
In this case, none of the fields on “Log Training” page are populated because the training title is not yet selected.	SCREEN: Show Log Training page, then highlight the fields from Training Title to Training Hours.
For this example, we will assume that the training you took already exists in the system. You need to locate it by typing keywords into the “Training Title” field – similar to what we did on the “Training Title List” page.	
For example, if we’re looking for a Civil Rights class, we would type “civil rights” into the “Training Title” field.	ACTION: Type “civil rights” in the training title field.
The matching training titles are displayed in a drop-down. For each match, the Training Title is displayed followed by the Provider name and Training Type in parenthesis.	SCREEN: Show the drop down, zoom in.
We can further narrow down the selection by entering more keywords, for example, “icn” for the provider we are looking for.	ACTION: type “icn” so the Search field now says “civil rights icn”.
You need to click on a training title to select it.	ACTION: Click on the match “CIVIL RIGHTS AND CN PROGRAMS (INSTITUTE OF CHILD NUTRITION (ICN), Webinar/Video/Online Training)”
Once you select the training title, the appropriate fields on the “Log Training” page are populated with its information.	SCREEN: Show Highlight the fields from Training Title to Training Hours.
Now you can select the Training Categories that were covered for that training session. You can select all available options, or only those applicable.	ACTION: Click on some of the checkboxes.
The Completion Date defaults to today’s date, and you can change the value by clicking on it and selecting a date from the calendar.	ACTION: Change the date.
Then you can select the School Year towards which this training should be counted.	ACTION: Click on the drop down to expand, do not change the selection.
You can also enter Comments, if needed.	ACTION: Highlight the Comments box.
Finally, you can select the Employees who attended this training. School Staff and State Employee users only have one option – their own name – in the Employees field, and they need to select it.	ACTION: Click the checkbox.
All fields except the “Comments” field on this form are required.	
Information entered will be confirmed for the employee selected to make sure no duplicate training records are being created. Uniqueness of a training record is determined by checking the combination of Employee, Training Title,	

Completion Date, and School Year. If a duplicate is found, an error message will be displayed – it means that you are recording a training for yourself a second time. You can cancel out or change the information entered.	
Check your information and press the “Log Training” button.	ACTION: Press the button.
A confirmation will be displayed. Press the “Close” button to go to the “Training Details” page populated with all the information for the training you have entered.	SCREEN: Show Training Details page.
If you go to the “Training History” page now and make sure the correct school year is selected, you will see the new training listed.	SCREEN: Show Training History page, highlight the Civil Rights Training.
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.
Managing a Training Record	SCREEN: Show Sub Chapter Intro Screen
In this section, we will talk about editing an existing training record, uploading documents, and deleting a training record.	SCREEN: Show My Training History page as before.
We will start on the “Training History” page and click on the training title to go to the “Training Details” page.	ACTION: Click on the CIVIL RIGHTS AND CN PROGRAMS training. SCREEN: Show Training Details page
Based on your access level, you may be able to edit a training record. In this case, the “Edit Training” button will be available to you. Otherwise, an information message will be displayed on top of the page.	SCREEN: Highlight the button.
Click the “Edit Training” button to access the “Update Training” page.	ACTION: Click the button. SCREEN: Show Update Training page.
Some of the fields, such as the “Training Title”, “Training Provider”, “Training Format”, and “Training Length” will not be editable. However, you will be able to modify the selection of “Training Categories”, the “Completion Date”, “School Year”, and “Comments.”	
The “Employees” selection field is also editable, but for the School Staff and State Employee users, it only has one option – their own name – which must remain selected.	
Let’s see this in action by changing the Completion Date and the School Year; then press “Save”. Click the “Close” button in the dialog box to exit.	ACTION: Change the completion date, change School Year to 21-22, press the Save Training button. Press the Close button on the confirmation dialog.
The changes will be reflected on the “Training Details” page.	SCREEN: Show Training Details page.
Let’s press the “Back to List” button to return to the “Training History” page. The Civil Rights training is now displayed for the school year 2021-22.	ACTION: Press the button. SCREEN: Show Training History page opened at 2021-2022 school year.
Let’s get back to the “Training Details” page.	ACTION: Click on the CIVIL RIGHTS AND CN PROGRAMS training title. SCREEN: Show Training Details page.
Based on your access level, you may be able to	ACTION: Click the button.

upload documents for the training. Use the "Upload Training Documents" button to access the "Upload Training Documents" page.	
On this page, you need to	SCREEN: Upload Training Documents page.
enter the Document Title,	ACTION: Type "Presentation slides".
select the Document Type,	ACTION: Select Other.
and select the Document to be uploaded.	ACTION: Press the Browse button to select a file.
Documents to be uploaded must be in the Adobe PDF, MS Word or MS Excel format, and be less than 2.5 MB in size.	SCREEN: Highlight this rule under the page title.
Press the "Upload" button to upload the document and link it to the training record.	ACTION: Press the Upload button.
All uploaded documents will be displayed in the bottom of the page.	SCREEN: Screen reloads, the document is listed.
Let's add another document. We first enter a Document Title, then select a Document Type, and browse the files to select the Document we want. By clicking "Upload", the document is uploaded and associated with the logged training.	ACTION: Add another document.
Documents can be viewed by clicking on a document title	ACTION: Click on the title link. The document opens.
and deleted by pressing the "Delete" button.	ACTION: Press the button and go through. SCREEN: Screen reloads and only one document is now listed.
We can return to the "Training Details" page by pressing the "Return to Training" button.	ACTION: Press the button.
The documents are listed in the "Training Documents" section of the page	SCREEN: Highlight the Documents section.
and can be viewed by clicking on the title link.	SCREEN: Highlight the link.
Based on your access level, you may be able to completely delete a training record, including the associated documents, if any. In this case, the "Delete" button will be available to you. Otherwise, an information message will be displayed on top of the page.	SCREEN: Highlight the button.
After pressing the "Delete" button a confirmation dialog is displayed	ACTION: Press the button.
twice.	ACTION: Press Yes on the first dialog, then Yes on the second one.
Once deleted, the training is completely gone and not visible anywhere.	SCREEN: Training History page
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.
Adding a Training Title	SCREEN: Show Sub Chapter Intro Screen
In this section we will talk about adding a training title.	SCREEN: Show the Training Title List page
If a training title you are looking for does not exist in the Professional Standards Training Tracker Tool, you can add it.	
You can add a training title by pressing the "Add New Training Title" button on the "Training Title	SCREEN: Highlight the button.

List" page	
or by pressing the "Add New Training Title" button on the "Log Training" page.	SCREEN: Show the empty Log Training page, highlight the button, then press it.
Both will open the "Create Training Title" page.	SCREEN: Show Create Training Title page.
The "Create Training Title" page is a form that allows you to add a training to the PSTTT. It will be helpful to have the corresponding training materials available to be referred to as needed.	SCREEN: Show Create Training Title page.
You will need to type in a descriptive Training Title,	ACTION: Type in "A Test Training".
enter Training Length in hours and minutes,	ACTION: Enter 2 hours 30 minutes.
select Training Format,	ACTION: Select "Online Training".
and enter the Provider.	ACTION: Enter "ICN".
You can also enter Additional Information, if needed.	
You also need to select all applicable Training Categories.	SCREEN: Highlight the Training Categories section.
Click on each of the top categories to expand it,	ACTION: Click on Nutrition - 1000.
and then click on sub-categories to expand them and select all applicable options.	ACTION: Select 1120 and 1140, then click on General Nutrition – 1300 and select 1320.
The number of selections in each category will be shown.	SCREEN: Highlight where it says (Selected: 3), etc.
Continue as needed.	ACTION: Click to select the 3330 checkbox.
All fields except the "Additional Information" field on this form are required. Check your information and press the "Save Training Title" button.	ACTION: Press the button.
A confirmation dialog will be displayed. From here, you will be taken to the page you came from. If you came from the "Log Training" page, it will be displayed populated with the new training title information.	ACTION: Press OK on confirmation dialog. SCREEN: Log Training page is displayed.
If you came from the "Training Title List" page, you will be taken back to it.	
Note that a training title is defined by the combination of its Title, Training Type and Provider. If the combination you entered already exists in the system, an information message is displayed. To address this problem, you will need to make changes, for example, you could add more words to the Training Title to distinguish it from other trainings that may have a similar title.	
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.
Managing a Training Title	SCREEN: Show Sub Chapter Intro Screen
In this section, we will talk about editing and deleting an existing training title record. We will start on the "Training Title List" page	SCREEN: Training Title List page with "test training" in the Search field and the new training title displayed.
and click on the training title to go to the "Training Title Details" page.	ACTION: Click on the training title. SCREEN: Show Training Title Details page.

As we have discussed already, you can record a training for this training title by pressing the "Log Training" button.	SCREEN: Highlight the button.
Based on your access level, you may be able to edit a training title. In this case, the "Edit" button will be available to you. Otherwise, an information message will be displayed on top of the page.	SCREEN: Highlight the button.
Click the "Edit" button to access the "Edit Training Title" page.	ACTION: Click the button. SCREEN: Show Edit Training Title page.
Most of the fields on "Edit Training Title" page will be editable. The "Training Categories" checkboxes will be editable only if no trainings were recorded for this training title.	ACTION: Expand Training Categories to show the enabled selected checkboxes.
Make the necessary changes and press the "Save Training Title" button.	ACTION: Change Length, press the button.
The confirmation dialog will be displayed, and you will be taken back to the "Training Title Details" page.	ACTION: Press OK On confirmation dialog. SCREEN: Show Training Title Details page.
Based on your access level, and if there were no corresponding trainings recorded, you may be able to completely delete a training title. In this case, the "Delete" button will be available to you. Otherwise, an information message will be displayed on top of the page.	SCREEN: Highlight the button.
After pressing the "Delete" button a confirmation dialog is displayed.	ACTION: Press the button, then OK on confirmation dialog.
Once deleted, the training title is completely gone and not visible anywhere.	SCREEN: Training Title List page search for the title, no results.
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.
This concludes our look at the trainings and training titles functionality in the Professional Standards Training Tracker Tool. 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 Sub Chapter Exit Screen.
	SCREEN: Show Closing Frame.

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.	
Manager and Director users can run reports on trainings logged by their employees. Employees multiple select can be used to select all, one, or several employees. At least one option needs to be selected in the Employees control. For School Managers and Directors, the Schools multiple select can be used to narrow down the list of employees. For School Employee and State Staff users, the reports are run only for the user logged in, so the Employees multiple select will be hidden.	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 so more employees appear. Click on All Employees option in the Employees field.
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 selected. You can click on arrows in table headings to sort the table onscreen by that column's value.	ACTION: Click to sort.
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. Select DIBOLL HIGH SCHOOL, All Employees, School Food Authority – All Other Staff, Nutrition-1000, Key Area = Administration-3000, check the Show Document Uploaded checkbox
The Detailed Report provides a list of all the 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. Select DIBOLL HIGH SCHOOL, All Employees, School Food Authority – All Other Staff, School Year = 2018-2019
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. Select All Employees, Operations-2000

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 and Director - Employees Functionality

Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is "Chapter 6: Manager and Director – Employees Functionality".	SCREEN: Show the Title Frame
The PSTTT provides Managers and Directors with an extensive set of features for managing Employee information. Additional PSTTT features that have been enhanced for use by Managers and Directors are described in detail in a separate video titled "Chapter 7: Manager and Director – Additional Functionality". Functions specific to the School Managers and Directors are described in detail in a separate video titled "Chapter 8: School Manager and Director Functionality".	
In this section, we will be going over the "Employees" menu that is available to Managers and Directors only.	SCREEN: Show PSTTT Dashboard page, logged in with **StateDirectorLogin**
View Employee List	SCREEN: Show Sub Chapter Intro Screen
The "View Employee List" option under the "Employees" menu opens the "View Employees" page which allows Managers and Directors to view the list of employees for the selected school year.	ACTION: Click on the View Employee List menu SCREEN: View Employees page, 2021-2022
An employee is deemed Active for a particular Manager or Director during a particular school year if: 1. At the end of the school year selected employee's assigned organization (state, school district, school) falls under the organization of the manager logged in; AND 2. Employee has at least one activity period during the school year selected.	
The "View Employees" page lists the Name, Employee Number, Job Title, Badges earned (if any), the number of Required training hours, and the number of Completed training hours for each employee.	ACTION: Highlight the columns
The "Generate Employee List" button opens an Excel file listing employee information for the School Year selected.	ACTION: Click the button SCREEN: Show the file
You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.	ACTION: Click on the headers, then go to the second page of results
Use the Search field to narrow down the selection by typing in one or more characters	ACTION: Type in a "lor" into the Search field, fewer employees are displayed

(letters or numbers) of the employee name and/or employee number. The entries in the table will be updated as you type.	
Use the School Year drop-down to view employees for different school years.	ACTION: Click on the SY drop-down, show options, select 2020-2021 – page reloads
Let's discuss which employees are visible to Manager and Director users of the PSTTT.	
PSTTT tracks employee activity periods based on their Hire Date, and any Deactivation and Reactivation dates available. Activity periods are those between the Hire Date and the Deactivation Date (if any), and between Reactivation Date and the next Deactivation Date (if any). If only the Hire Date is available, the employee is deemed active from that date forward.	SCREEN: Show View Employees page with active, Deactivated, and Relocated employees
An employee is deemed Active for a particular Manager or Director during a particular school year if:	SCREEN: show text bullets overlaying the screenshot as you speak
At the end of the school year the selected employee belongs to the Manager's or Director's organization. If an employee was assigned to your organization at some point during a given school year, they will be visible to you for that school year. If an employee has started the school year under your organization but then was moved to another organization, they will not be visible for that school year. If an employee was in your organization at the end of a school year, but was moved to another organization later, they will be visible with the status of "Relocated." If an employee was active for at least one day during a given school year, but was later deactivated, they will be visible with the status of "Deactivated."	SCREEN: 1. At the end of the school year the selected employee belongs to the manager's or director's organization 2. Status of Relocated – employee was moved to another organization later 3. Status of Deactivated – employee was deactivated in the given school year or later
If an employee was deactivated during the selected school year or later, the employee name will not be clickable, and the corresponding status will be listed as "Deactivated."	ACTION: Back on View Employees page, highlight deactivated employees
If an employee was moved to a different location that doesn't fall under the organization of the user logged in after the end of the selected school year, the employee name will not be clickable, and the corresponding status will be listed as "Relocated".	ACTION: Back on View Employees page, highlight relocated employees
Clicking on the employee name will take the Manager and Director to the employee's "User Profile" page which we will discuss	ACTION: click on employee name SCREEN: User Profile page

later in this training.	
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.
Search Employees	SCREEN: Show Sub Chapter Intro Screen
The “Search Employees” option under the “Employees” menu opens the “Employee Search” page which allows Managers and Directors to search for their active employees.	ACTION: Click on the Search Employees menu SCREEN: Employee Search page
This page lists the Name, Employee Number, and the organization the employee belongs to.	ACTION: Highlight the columns
You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.	ACTION: Click on the Name header twice
Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the employee name and/or employee number. The entries in the table will be updated as you type.	ACTION: Type “br” into the Search field, fewer employees are displayed
Clicking on the employee name will take the Manager or Director to the employee’s “User Profile” page.	ACTION: click on employee name (Bristol, Lorna) SCREEN: User Profile page
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.
User Profile Page for an Employee	SCREEN: Show Sub Chapter Intro Screen
Information displayed on employee’s User Profile page is similar to the user’s own profile page that was discussed in a separate video titled “Chapter 2: Login for the First Time”.	SCREEN: Employee’s User Profile page
For Managers and Directors, the “User Profile” page has two extra buttons – “View Training History” and “View User History”.	ACTION: Highlight buttons.
“View Training History” button opens the “Training History” page for the selected employee.	ACTION: Press View Training History button SCREEN: Employee’s Training History page
This page is similar to the “My Training History” page that was discussed in a separate video titled “Chapter 2: Login for the First Time”. It lists Course Title, Completion Date, and Training Length for all trainings the employee logged during the school year selected in the drop-down.	ACTION: Highlight columns and the drop-down.
The “View User History” button on “User Profile” page opens the “User History” page which allows the Manager or Director to view and change the employee’s role and job title for any given year within their organization.	SCREEN: Employee’s User Profile page ACTION: Press the View User History button
The table on “User History” page contains a	SCREEN: User History page

row per every school year an employee was active and lists the role, job title, and location.	ACTION: Zoom in to show different roles and job titles
If an employee held multiple positions in multiple organizations during a given school year, only the last organization and position combination is displayed, since the last position during a school year is used to calculate the number of required hours.	
Manager and Director users can update employee's role and job title retroactively for each school year by pressing the corresponding "Update" button that opens the "Edit Historical User Profile" page.	ACTION: Press Update button for 2019-2020 SCREEN: Edit Historical User History page
The "Edit Historical User Profile" page is similar to the "Edit User Profile" page, however, it only applies to one school year, and allows editing of only the Role and Job Title. Select new values and press the "Update" button to save, or "Cancel" button to return to the "Edit Historical User Profile" page without saving your changes.	ACTION: Select a different role and job title, save.
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.
Print Certificates	SCREEN: Show Sub Chapter Intro Screen
The "Print Certificates" option under the "Employees" menu opens the "Print Certificates" page which allows Managers and Directors to view and print certificates of completion for any employee who has met or exceeded their annual required training hours for the school year selected.	ACTION: Click on the Print Certificates menu SCREEN: Print Certificates page
This page lists the Name, Employee Number, Job Title, Badges earned (if any), the number of Required training hours, and the number of Completed training hours for each employee.	ACTION: Highlight the columns
You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.	ACTION: Click on the headers, then go to the second page of results
Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the employee name and/or employee number. The entries in the table will be updated as you type.	ACTION: Type in "ros" into the Search field, fewer employees are displayed
Use the School Year drop-down to view employees for different school years.	ACTION: Click on the SY drop-down, show options, select 2017-2018 – page reloads
The checkboxes next to the employee names allow the Manager or Director to select one or multiple names. Clicking the "Print Certificate" button will generate the certificates for all selected employees in a single PDF file.	ACTION: select a couple of checkboxes, press the Print Certificates button SCREEN: PDF opens
Each employee's certificate will be on a separate page in the PDF output.	ACTION: scroll through the PDF

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 User Profile	SCREEN: Show Sub Chapter Intro Screen
The “Create User Profile” option under the “Employees” menu opens the “Create User Profile” page which allows Managers and Directors to create profiles for employees who will not be logging into PSTTT, so that the Manager and Director can track training hours for them.	ACTION: Click on the Create User Profile menu SCREEN: Create User Profile page
The functionality of the “Create User Profile” page used by Managers and Directors to create employee profiles is the same as the “Create User Profile” page that is described in a separate video titled “Chapter 2: Login for the First Time”.	
You need to enter employee information including name, employee number, if available, hiring date, and email, if available.	ACTION: Enter Anna, Atest, 12345, 8/23/2019.
User Category field is already set to your User Category and cannot be edited. This is also true for the other fields describing the organization you belong to - State, School District, or FNS Office.	ACTION: Highlight disabled fields
Select the employee’s Role and Job Title.	ACTION: Select Staff, then any job title
Press the “Create” button to save your changes or press the “Cancel” button to return to the “Home” page without saving your changes.	ACTION: click Create SCREEN: User Profile page for the new employee
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.
Upload Bulk Employee Profiles	SCREEN: Show Sub Chapter Intro Screen
The “Upload Bulk Employee Profiles” option under the “Employees” menu is available to Managers and Directors. It opens the “Upload Bulk Employee Profiles” page which allows Managers and Directors perform a bulk upload of employee profiles.	ACTION: Click on the Employees menu and highlight Upload Bulk Employee Profiles sub-menu
Instructions can be accessed at the top of the page by clicking the gray heading bar to expand or collapse the text.	ACTION: Click to expand and collapse
This page provides controls to select and upload an Excel file with employee records data. The file must mirror the template spreadsheet linked from the page. Click on the “template” link, shown in blue, and save the template file to your computer.	ACTION: click on Template link, then SCREEN: Show the template file
The template contains the following columns:	SCREEN: Zoom in to the template column headings as you talk about them
First Name, which is a required field; enter employee’s first name.	

Last Name also required; enter employee's last name.	
Hiring Date – required; enter employee's hiring date in the MM/DD/YYYY format.	
Email Address – enter employee's email address.	
Employee Number – enter the employee number.	
User Type ID, which is required; enter one of the numeric values listed.	
User Role ID – required; enter one of the numeric values listed.	
Job Title ID – required; enter one of the numeric values listed.	
State Code – required for School and State Agency users only; enter a 2-letter state code.	
School ID/IDs – required for School Manager and School Employee users only; enter one or more numeric school IDs separated by commas.	
Please refer to the Generate Schools List (available under the Employee tab) to look up the School ID.	
District ID – required for School users only; enter a numeric district ID.	
Please refer to the Generate Schools List (available under the Employee tab) to look up the District ID.	
USDA FNS Office ID – required for USDA FNS users only; enter one of the numeric values listed.	
The file also contains a sample row. Use this row as a sample, then delete it from the spreadsheet.	SCREEN: Zoom in to the sample row
Fill out and save the spreadsheet to your computer.	SCREEN: Show a filled out spreadsheet - UserProfileBulkUpload_template_State_DE.xlsx
Click "Browse" to locate the spreadsheet you just saved, then use the "Upload File" button on "Upload Bulk Employee Profiles" page to upload the file.	ACTION: click, etc.
The "Review Uploaded Employee Profiles" page is displayed once the file is uploaded. The page displays a block of data entry controls for each employee profile imported from the Microsoft Excel file.	SCREEN: Show the "Review Uploaded Training Titles" page, scroll to show the blocks
The data entry fields are: First Name, Last Name, Business or Work Email, Employee Number, Hiring Date, Role, Job Title, and State. For School Managers and Directors, District and Schools fields will be also present. Required fields are denoted by the asterisk (*).	SCREEN: Zoom into a single block.

Blocks for employee profiles that were flagged by the import data validation as having errors, will be displayed in red. Error messages will be displayed for each field that has invalid or missing values in it.	SCREEN: Highlight a red block with errors
You can edit information in the fields on “Review Uploaded Employee Profiles” page if you want to change any values before being saved.	ACTION: Edit a block that is not red, change Employee Number
Edit the fields to correct the errors, and as you do so, the error messages will disappear. Once there are no validation errors detected for a particular employee profile, its block will become blue.	ACTION: Edit information in the 1st block that is red – set Hiring Date to 07/22/2021
You can also delete any employee profile block by pressing the “Remove Employee Profile” button. A confirmation dialog will be displayed. Once removed, this action cannot be undone.	ACTION: Remove the 2nd red block
Once you are done correcting and modifying the employee profile data, use the “Import Employee Profiles” button to save the employee profiles.	ACTION: Press the button
A confirmation dialog will be displayed listing the number of employee profiles that were successfully imported.	SCREEN: Show the dialog
Data entered will be checked to make sure no duplicate employee records are being created. Uniqueness of an employee record is determined by checking the combination of First Name, Last Name, Email Address and Employee Number. If any of the employee profile records caused further errors while being saved, an error message will be displayed.	ACTION: Press OK on the dialog SCREEN: Show message dialog
The employee profiles that did not have any errors will be saved at this point and will be accessible through the PSTTT screens. Any records with errors will be listed on “Review Uploaded Employee Profiles” page with the appropriate error messages.	SCREEN: Review Uploaded Employee Profiles page, highlight the error message
You can edit the data for employee profiles with errors or use the “Remove Employee Profile” button for each employee profile block. Once you are done correcting and modifying the data, use the “Import Employee Profiles” button again to save.	ACTION: Correct the data, highlight the Import Employee Profiles button.
You can also cancel the process of importing the employee profile records at any point by pressing the “Cancel” button on “Review Uploaded Employee Profiles” page. If some of the employee profile records were already saved, they will remain in the system, but the	ACTION: Press the Cancel button

records still displayed on "Review Uploaded Employee Profiles" page will not be saved.	
A confirmation dialog will be displayed since this action cannot be undone.	SCREEN: Show the confirmation dialog
Press "Leave page" button to cancel, or press "Stay on page" button to stay on page and continue editing data in the employee profile blocks.	ACTION: Press Leave Page button
Once import process is complete, a success dialog is displayed, and the user is taken to the "View Employees" page.	SCREEN: Show the View Employees page
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.
Deactivate Employees	SCREEN: Show Sub Chapter Intro Screen
The "Deactivate Employees" option under the "Employees" menu opens the "Deactivate Employees" page which allows the Manager or Director to select one or more active employees to deactivate. Controls on this page allow the Manager or Director to select one or more employees. Required fields are denoted by the asterisk (*).	ACTION: Click on the Deactivate Employees menu SCREEN: Deactivate Employees page
Select one or more employees in the "Employees" field,	ACTION: Select two employees we just imported (names in all caps)
enter the Deactivation Date,	ACTION: Change Date to 11/11/2021
and press the "Deactivate Selected Employees" button. A confirmation dialog listing the selected employees will be displayed.	ACTION: press button SCREEN: Confirmation dialog, press Deactivate
Press the "Deactivate" button to deactivate the selected employees. Press the "Cancel" button to cancel.	ACTION: Press Deactivate SCREEN: Dialog with the failed user
The confirmation dialog displayed after the deactivations are performed lists all employees who could not be deactivated with the corresponding reasons, if any.	ACTION: Zoom into the dialog
This concludes our review of the "Employees" menu. 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 Sub Chapter Exit Screen
	SCREEN: Show Closing Frame

Chapter 7: Manager and Director – Additional Functionality

Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is “Chapter 7: Manager and Director – Additional Functionality”.	SCREEN: Show the Title Frame
The PSTTT provides Managers and Directors with an extensive set of features for managing Employee information. This functionality is covered in a separate video titled “Chapter 6: Manager and Director – Employees Functionality”. Functions specific to the School Managers and Directors are described in detail in a separate video titled “Chapter 8: School Manager and Director Functionality”.	
In this video, we will be going over other PSTTT features that have been enhanced for use by Managers and Directors.	SCREEN: Show PSTTT Dashboard page, logged in with **StateDirectorLogin**
Log Training	SCREEN: Show Sub Chapter Intro Screen
The “Log Training” functionality was enhanced to allow Managers and Directors to select multiple participants for each training session.	ACTION: Click on the Training / Log Training menu, Log Training page opens
The Employee selection field allows the Manager or Director user to select one or more names of their employees (including their own name), via checkboxes, for the training to be documented.	SCREEN: Scroll down so that School Year control is on top of the screen and most of the Employees field is visible
The list of employees in the Employee selection field is based on the School Year selected for the training.	ACTION: Change the school year to 2018 - 2019
If you select some employees	ACTION: Select Almond, Bristol, Buck
and then change the School Year value,	ACTION: Change the school year to 2019 - 2020
the list of Employee selection field will be updated and your selections will be cleared out.	SCREEN: contents of the Employee control change (Bayley and Buck are selected).
Employee Name, Employee Number, and Role are listed for each employee.	SCREEN: Highlight
You can re-sort the values by clicking on the table headers.	ACTION: Click to re-sort
Use the Search field to narrow down the selection by typing in one or more characters of the employee name and/or employee number. The entries in the table will be updated as you type.	ACTION: Type “ol” fragment keyword into the Search field, fewer employees are displayed Select Roswoll
You can view all available and selected Employees by clearing out the Search field.	ACTION: clear Search field (Bayley, Buck, Roswoll selected).
After entering all the required information,	SCREEN: Select training title, one or more Training Categories, Completion Date = today’s date, School Year 2019-2020, Bayley, Buck, Roswoll). **NOTE: if you need to re-shoot this, just select a different training title**
press the “Log Training” button to save a new	ACTION: Press Log Training button

training record.	
Employees selected for this training have to be active both during the School Year and on Completion Date selected. If Completion Date does not fall into a period when employee's PSTTT account was active, training is not saved and an error message is displayed.	SCREEN: Error dialog for Bayley
Press the "Close" button on the dialog, and then correct the data and press the "Log Training" button again.	ACTION: Close the dialog, uncheck Bayley, press the Log Training Button to save
Once the training is successfully saved, user is notified by a confirmation dialog.	SCREEN: Confirmation dialog ACTION: Press Close
To add employees to an existing training record or remove employees from an existing training record, use the "Edit" button on the "Training Detail" page to edit the training.	SCREEN: Training Details page ACTION: Press Edit button
On the "Update Training" page, to remove employees uncheck their checkboxes,	SCREEN: Update Training page ACTION: Deselect Roswoll
and to add employees, check their checkboxes and save.	ACTION: Select the 2 Shee employees, save, Close on dialog
The list of employees assigned to the training will be updated accordingly.	SCREEN: Training Detail page with the updated list of employees
View Logged Trainings	SCREEN: Show Sub Chapter Intro Screen
The "View Logged Trainings" option under the "Training" menu is available to Managers and Directors only.	ACTION: Click on the Training menu and highlight View Logged Trainings sub-menu
It opens the "View Logged Trainings" page which allows Managers and Directors to view the list of trainings that have been logged for their employees.	SCREEN: View Logged Trainings page
This page lists the Course Title, Employee Name(s), Training Length, and Completion Date for the employees visible to the user logged in (based on their permissions) that were active during the School Year selected in the drop-down.	ACTION: Click on the SY drop-down, show options, select 2020-2021 – page reloads
You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.	ACTION: Click on the headers, then go to the second page of results
Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the training title. The entries in the table will be updated as you type.	ACTION: Type in "basic" keyword into the Search field, fewer employees are displayed
Clicking on the Training Title for a training record shown on the "View Logged Training" page will take the Manager and Director to the "Training Details" page for that training record.	ACTION: Click on BASIC CULINARY MATH: CONVERSIONS titles for SCREEN: Training Details page
Manager and Director users may edit, upload documents for, or delete training records for which they have proper authority over all the training attendees.	
If you have proper authority over all training attendees, the "Edit Training" button will be	

available allowing you to edit the training record. In addition to that, if all employees selected for the training were active during the selected School Year, the "Delete" button will be available allowing you to delete the training record.	
Any employees no longer valid for the training will be listed in the Invalid Employees section.	SCREEN: Training Details page for a training with Invalid Employees (20-21 RRISD COVID SAFETY TRAINING)
An employee can become invalid for an existing training if they were deactivated with a Deactivation Date that is before the School Year selected for the training.	
Upload Bulk Training Records	SCREEN: Show Sub Chapter Intro Screen
Managers and Directors have the ability to perform a bulk upload of trainings for their employees using the "Upload Bulk Training Records" sub-menu under the "Training" menu.	ACTION: Highlight the menu
The "Upload Bulk Training Records" sub-menu takes you to the "Upload Bulk Training Records" page.	ACTION: Click on the menu SCREE: Show "Upload Bulk Training Records" page
Instructions can be accessed at the top of the page by clicking the gray heading bar to expand or collapse the text.	ACTION: Click to expand and collapse
This page provides options to select and upload an Excel file with training data. The file must mirror the template spreadsheet linked from the page. Click on the "template" link, shown in blue, and save the template file to your computer.	ACTION: click on Template link, then SCREEN: Show the template file
The template contains the following fields:	SCREEN: Zoom in to the template column headings as you talk about them
Training Title ID – required; enter a training title ID.	SCREEN: Highlight the column heading
You can use the "Generate Training Title List" option available under "Training" menu to add the requested training title information to the template.	SCREEN: Show Generate Training Title List on the Training menu
This menu generates a spreadsheet containing the following information for each training title: ID, Title, Provider, Type, Length, Note, Created On date, and Number of Trainings recorded for the training title.	SCREEN: Show the training titles spreadsheet
Other template fields are: Learning Objectives (separated by commas) – required; enter numeric values for training objectives, separated by commas.	SCREEN: Show the template spreadsheet, highlight the column headings
Completion Date – also required; a completion date.	
School Year – required; enter a school year.	
Comments – enter comments.	
PSTTT Employee IDs (comma-separated) – required; enter the PSTTT Employee IDs separated by commas.	
You can look up PSTTT Employee IDs from the "View Employee List" page available under the	SCREEN: View Employee List on the Training menu

"Employees" menu.	
Select a School Year and press the "Generate Employee List" button	SCREEN: Show the button
to generate a spreadsheet containing the employee information including PSTTT Employee IDs.	SCREEN: Show the employees spreadsheet
Back to the Upload Bulk Training Records template, the template file also contains a sample row. Use this row as a sample, then delete it from the spreadsheet.	SCREEN: Zoom in to the sample row
Fill out and save the spreadsheet to your computer.	SCREEN: Show a filled out spreadsheet TrainingsBulkUpload_DE.xlsx
Click "Browse" to locate the spreadsheet you just saved, then use the "Upload File" button on "Upload Bulk Training Titles" page to upload the file.	ACTION: click, etc.
The "Review Uploaded Training Records" page is displayed once the file is uploaded. The page displays a block of data entry controls for each training record imported from the Microsoft Excel file.	SCREEN: Show the "Review Uploaded Training Records" page, scroll to show the blocks
The data entry fields are: Training Title, Training Provider, Training Format, Training Length (Hours and Minutes) – derived from the Training Title ID, Completion Date, School Year, Comments, Training Categories, and Selected Employees. Required fields are denoted by the asterisk (*).	SCREEN: Zoom into a single block.
The "Show List" button in the "Selected Employees" section expands the list of employees that were active during the School Year and on Completion Date selected.	ACTION: Click the button on a blue block SCREEN: Section expands
If you change the School Year value, the list of employees available for this training will change.	ACTION: Change the school year to 2020-2021 SCREEN: List of employees changes
You can edit information in the fields on "Review Uploaded Training Records" page if you want to change any values before being saved.	ACTION: Edit Completion Date in blue block to 07/15/2021, then check one more employee
Blocks for training records that were flagged by the import data validation as having errors, will be displayed in red. Error messages will be displayed for each field that has invalid or missing values in it.	SCREEN: Highlight the first red block with errors
The "Selected Employees" control may have up to three sections, as applicable. The "Invalid Employees" section lists employee IDs imported from your spreadsheet that are not valid for the School Year selected.	SCREEN: Highlight sections as you speak
"Selected Employees" section displays employees, whose IDs were successfully	ACTION: Uncheck one employee (not Bristol)

imported from your spreadsheet; you can uncheck them if necessary.	
“Additional Eligible Employees” section lists additional employees who were valid for the School Year selected; you can select them if necessary.	ACTION: Press Show List button, select one more employee
Use the “Remove Invalid Selection(s)” buttons in the Training Categories and Invalid Employees sections to remove invalid selections, if any.	ACTION: Press the button SCREEN: section disappears
Edit the fields to correct the errors, and as you do so, the error messages will disappear. Once there are no validation errors detected for a particular training record, its block will become blue.	ACTION: Check one or more Training Categories – block is now blue
You can also delete any training record block by pressing the “Remove Training Record” button. A confirmation dialog will be displayed. Once removed, this action cannot be undone.	ACTION: Remove the last red block
Once you are done correcting and modifying the training records data, use the “Import Training Records” button to save the trainings.	ACTION: Press the button **NOTE: If you need to repeat the steps beyond this point, first delete the two trainings we just created: “A GUIDE TO TASTE TESTING LOCAL FOODS IN SCHOOLS” and “ANNUAL TRAINING MODULE: CIVIL RIGHTS – PENNSYLVANIA” for 2021-2022**
A confirmation dialog will be displayed listing the number of training records that were successfully imported.	SCREEN: Show the dialog
Data entered will be checked to make sure no duplicate training records are being created. Uniqueness of a training record is determined by checking the combination of Employee, Training Title, Completion Date, and School Year.	ACTION: Press OK on the dialog
If any of the training records caused further errors while being saved, an error message will be displayed.	SCREEN: Show error message
The training records that did not have any errors will be saved at this point and will be accessible through the PSTTT screens. Any records with errors will be listed on “Review Uploaded Training Records” page with the appropriate error messages.	SCREEN: Review Uploaded Training Records page, highlight the error message for Bristol
You can edit the data for training records with errors or use the “Remove Training Records” button for each training record block. Once you are done correcting and modifying the data, use the “Import Training Record” button again to save.	ACTION: Uncheck Bristol, highlight the Import Training Records button.
You can also cancel the process of importing the training records at any point by pressing the “Cancel” button on “Review Uploaded Training Records” page. If some of the training records were already saved, they will remain in the	ACTION: Press the Cancel button

system, but the records still displayed on "Review Uploaded Training Records" page will not be saved.	
A confirmation dialog will be displayed since this action cannot be undone.	SCREEN: Show the confirmation dialog
Press "Leave page" button to cancel, or press "Stay on page" button to stay on page and continue editing data in the training record blocks.	ACTION: Press Leave Page button
Once import process is complete, a success dialog is displayed, and the user is taken to the "View Logged Trainings" page.	SCREEN: Show the View Logged Trainings page
This concludes our review of the additional trainings functionality for Managers and Directors. 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
Managing Training Titles	SCREEN: Show Sub Chapter Intro Screen
The training titles functionality was enhanced for Manager and Director users to allow them to generate a list of all training titles in Excel file format by clicking on "Generate Training Title List" sub-menu under the "Trainings" menu.	ACTION: Click to expand the Trainings menu, highlight the sub-menu
The list of training titles can also be generated by pressing the "Generate Training Titles List" button on "Training Title List" page.	SCREEN: Training Title List page ACTION: Click the button
The following information is included for each training title: ID, Title, Provider, Type, Length, Note, Created On date, and Number of Trainings recorded for the training title.	SCREEN: Show the spreadsheet
The training titles functionality was also enhanced for the Director users to allow them to manage training titles created by their employees. Managers can only manage training titles that they created.	SCREEN: Training Title List page
This functionality is accessible through the "Training Title Details" page.	ACTION: Click on a training title
Directors can use the "Edit" button to edit training title information and the "Delete" button to delete a training title. This functionality is described in detail in "Chapter 4": Adding, Editing, and Deleting Training Records and Training Titles" training video.	SCREEN: Training Title Details page opens, highlight the buttons
Upload Bulk Training Titles	SCREEN: Show Sub Chapter Intro Screen
The "Training Title List" option under the "Training" menu opens the "Training Title List" page which allows users to view and search the list of training titles available in PSTTT. This functionality is described in detail in "Chapter 4": Adding, Editing, and Deleting Training Records and Training Titles" training video.	ACTION: Click on the Training menu and highlight the Training Title List sub-menu
Managers and Directors have the ability to perform a bulk upload of training titles using the "Upload Bulk Training Titles" button on the	ACTION: Highlight the button

“Training Title List” page.	
The “Upload Bulk Training Titles” button opens the “Upload Bulk Training Titles” page.	ACTION: Click the button SCREE: Show “Upload Bulk Training Titles” page
Instructions can be accessed at the top of the page by clicking the gray heading bar to expand or collapse the text.	ACTION: Click to expand and collapse
This page provides controls to select and upload an Excel file with training titles data. The file must mirror the template spreadsheet linked from the page. Click on the “template” link, shown in blue, and save the template file to your computer.	ACTION: click on Template link, then SCREEN: Show the template file
The template contains the following columns: Training Title Name – required; enter a descriptive training title.	SCREEN: Zoom in to the template column headings as you talk about them
Training Hours – required; enter a numeric value for Hours (whole number, 0 or greater).	
Training Minutes – required; enter a numeric value for Minutes (whole number, from 0 to 55 in increments of 5).	
Training Format – required; enter one of the following values: Face-to-Face, Webinar/Video/Online Training, Print Materials/Training Materials, Other.	
Training Provider – required; enter the instructor name or the provider organization or person.	
Additional Information – enter additional information and/or comments, if any.	
Training Categories – required; enter Learning Objectives separated by commas.	
The file also contains a sample row. Use this row as a sample, then delete it from the spreadsheet.	SCREEN: Zoom in to the sample row
Fill out and save the spreadsheet to your computer.	SCREEN: Show a filled out spreadsheet TrainingTitlesBulkUpload_DE.xlsx
Click “Browse” to locate the spreadsheet you just saved, then use the “Upload File” button on “Upload Bulk Training Titles” page to upload the file.	ACTION: click, etc.
The “Review Uploaded Training Titles” page is displayed once the file is uploaded. The page displays a block of data entry controls for each training title imported from the Microsoft Excel file.	SCREEN: Show the “Review Uploaded Training Titles” page, scroll to show the blocks
The data entry fields are: Training Title, Training Provider, Training Format, Training Length (Hours and Minutes), Additional Information, and Training Categories. Required fields are denoted by the asterisk (*).	SCREEN: Zoom into a single block.
The Training Categories control functions the same as on “Create Training Title” page. Click to expand each of the training categories to view	ACTION: Click, select one more

sub-categories and the selected values, if any.	
Blocks for training titles that were flagged by the import data validation as having errors, will be displayed in red. Error messages will be displayed for each field that has invalid or missing values in it.	SCREEN: Highlight a red block with errors
You can edit information in the fields on “Review Uploaded Training Titles” page if you want to change any values before being saved.	ACTION: Edit a block that is not red
Edit the fields to correct the errors, and as you do so, the error messages will disappear. Once there are no validation errors detected for a particular training title, its block will become blue.	ACTION: Edit information in the first red block – enter Provider name KITCHEN LEAD
You can also delete any training title block by pressing the “Remove Training Title” button. A confirmation dialog will be displayed. Once removed, this action cannot be undone.	ACTION: Remove the second red block
Once you are done correcting and modifying the training titles data, use the “Import Training Titles” button to save the trainings.	ACTION: Press the button **NOTE: If you need to repeat the steps beyond this point change the names of trainings in the spreadsheet**
A confirmation dialog will be displayed listing the number of training titles that were successfully imported.	SCREEN: Show the dialog
Data entered will be checked to make sure no duplicate training title records are being created. Uniqueness of a training title record is determined by checking the combination of Training Title, Training Provider, and Training Format. If any of the training title records caused further errors while being saved, an error message will be displayed.	SCREEN: Error for COMBI OVEN CLEANING PROCESS ACTION: Press OK on the dialog
The training titles that did not have any errors will be saved at this point and will be accessible through the PSTTT screens. Any records with errors will be listed on “Review Uploaded Training Titles” page with the appropriate error messages.	SCREEN: Review Uploaded Training Titles page, highlight the error message
You can edit the data for training titles with errors or use the “Remove Training Title” button for each training title block. Once you are done correcting and modifying the data, use the “Import Training Titles” button again to save.	ACTION: Correct the data by changing the Training Type, highlight the Import Training Titles button.
You can also cancel the process of importing the training title records at any point by pressing the “Cancel” button on “Review Uploaded Training Titles” page. If some of the training title records were already saved, they will remain in the system, but the records still displayed on “Review Uploaded Training Titles” page will not be saved.	ACTION: Press the Cancel button
A confirmation dialog will be displayed since this action cannot be undone.	SCREEN: Show the confirmation dialog
Press “Leave page” button to cancel, or “Stay on	ACTION: Press Leave Page button

page" button to stay on page and continue editing data in the training title blocks.	
Once import process is complete, a success dialog is displayed, and the user is taken to the "Training Titles List" page.	SCREEN: Show the Training Titles List page
This concludes our review of the additional trainings functionality for Managers and Directors. 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
Additional Reports Functionality	SCREEN: Show Sub Chapter Intro Screen
All reports require the user to select the set of employees the report is generated for.	SCREEN: Reports page
Manager and Director users can run reports for their employees' training hours as well as their own training hours.	SCREEN: Highlight the Employees controls/table
The set of employees available for selection depends on the School Year selected – all employees active during this year are listed.	ACTION: Change School Year to 2019-2020, the list of Employees changes
State Directors and Managers can generate reports on State users in their state or on School users in their state – the selection is driven by the Category drop-down.	ACTION: Highlight and open the Category drop-down
When STATE is selected as the Category, the State drop-down is set to the Manager's or Director's state and is not editable.	ACTION: Highlight the State drop-down
The Employees field is populated with the state employees.	ACTION: Highlight the Employees control
When SCHOOL is selected as the Category, the State drop-down is set to the Manager's or Director's state and is not editable, and "School District" and "Schools" fields are displayed.	ACTION: Change Category to SCHOOL SCREEN: School controls are displayed
The Manager and Director can select a School District and one or more schools to narrow down the selection of records in the "Employees" field.	ACTION: Select a district - APPOQUINIMINK, then school - CEDAR LANE EARLY CHILDHOOD CENTER SCREEN: Contents of the Employees control change.
For School Directors and Managers, the State and School District fields will default to their state and school district. The Schools field can be used to narrow down the selection of employees.	
For Managers and Directors, all reports have an additional option – the "Include Deactivated Employees" checkbox.	ACTION: Highlight the checkbox
When the "Include Deactivated Employees" checkbox is not selected, employees who are currently inactive will not be included in the report output.	ACTION: De-select the checkbox
For Managers and Directors, the Summary report has another additional option – the "Include Employees Without Trainings" checkbox.	ACTION: Change Report Type to Summary Report, highlight the checkbox

Summary report is run for employees selected in the Employees field. When the “Include Employees Without Trainings” checkbox is not selected, employees who do not have any trainings logged for that School Year will not be included in the Summary report output.	ACTION: Click on All Employees, check the checkbox, press Generate Report
When the “Include Employees Without Trainings” checkbox is selected, employees without any trainings logged for that School Year will be included in the Summary report output.	SCREEN: Summary Report output ACTION: Highlight employee(s) with 0 completed hours
This concludes our review of the additional reports functionality for Managers and Directors. 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
Additional Help Menu Functionality	SCREEN: Show Sub Chapter Intro Screen
The “Help” dropdown menu for Managers and Directors has one additional option – “Report an Issue” which is used to submit an issue report or a data change request.	SCREEN: Show PSTTT “Dashboard” page ACTION: Click on the Help / Report an Issue menu
The “Report an Issue” form page displays data entry fields for the user to allow them to submit an issue report or a data change request.	SCREEN: Report an Issue page **Off-screen, edit the Email Address field, so it is not populated with Alla’s email**
The asterisks mark the required fields. The User Name and Email from the logged in user are populated by default but may be changed by the user.	SCREEN: Highlight fields
Press the “Create” button to submit your issue. A confirmation dialog will be displayed with the buttons representing two choices.	ACTION: Press Create SCREEN: Dialog
Press the “Return to Dashboard” button to return to the “Home” page. Press the “Report New Issue” button to return to the “Report an Issue” page and report another issue.	ACTION: Press Return to Dashboard.
This concludes our look at the additional Manager and Director functionality in the Professional Standards Training Tracker Tool. 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 Sub Chapter Exit Screen
	SCREEN: Show Closing Frame

Chapter 8: School Manager and Director Functionality

Conversation	On-screen Action
Welcome to the Professional Standards Training Tracker Tool training video series. This is “Chapter 8: School Manager and Director Functionality”.	SCREEN: Show the Title Frame
Functions specific to Managers and Directors in general are described in detail in two separate videos titled “Chapter 6: Manager and Director - Employees Functionality” and “Chapter 7: Manager and Director – Additional Functionality”. This video details additional functionality specific to School Managers and Directors.	
Employee Selection Options	SCREEN: Show Sub Chapter Intro Screen
To make it easier for School Managers and Directors to select Employees on various screens, they can filter to select one or more schools to narrow down the selection of Employees.	SCREEN: Show PSTTT “Dashboard” page, logged in with ManagerLogin
For example, on “Log Training” page you can use the “Filter Employees By Schools” option to narrow down the list of Employees. School Managers can select from a list of Schools they are assigned to, while School Directors can choose from all schools in the District.	SCREEN: Log Training page (go to Training / Log Training menu) ACTION: Select ROCK CREEK HIGH SCHOOL, fewer employees are displayed
On “Deactivate Employees” page you can select one or more school in the “School(s)” field.	SCREEN: Deactivate Employees page (go to Employees / Deactivate Employees menu) ACTION: Select SILVER SPRING ELEMENTARY SCHOOL, fewer employees are displayed
On “Reports” page you can select one or more school in the “School(s)” field as well.	SCREEN: Reports page ACTION: Select SILVER SPRING ELEMENTARY SCHOOL, fewer employees are displayed
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.
Manage Schools	SCREEN: Show Sub Chapter Intro Screen
The “Manage Schools” option under the “Employees” menu is available to School Managers and Directors only. It opens the “Manage Schools” page which allows School Managers and Directors to view and manage the list of schools in their school district.	ACTION: Click on the Manage Schools menu SCREEN: Manage Schools page
School Name, Type, City, State, and Zip are listed for each school.	
Click the “Edit” link for a school to open the “Edit School” page.	ACTION: Click Edit SCREEN: Edit School page opens

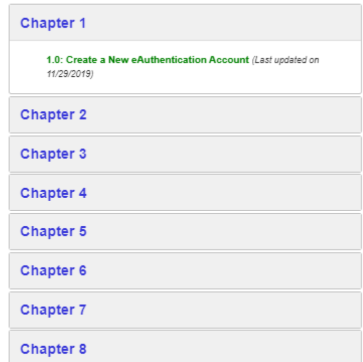
Some of the fields on “Edit School” page are prepopulated with the data for your school district and are not editable: State, County, and District.	ACTION: Highlight the fields
The rest of the fields contain the school information: School Name, School Type, Address, City, and Zip. Required fields are denoted by an asterisk.	ACTION: Highlight the fields
Click on the “School Types Guidance Chart” link to view a PDF document listing the available school types.	ACTION: Click on the link SCREEN: PDF opens
Use “Back to List” button to return to the “Manage Schools” page without saving the changes or use the “Update” button to save.	ACTION: Click Back to List
School Managers and Directors can create new schools within their district. Press the “Add New School” button on “Manage Schools” page to open the “Create New School” page.	SCREEN: Manage Schools page ACTION: Press the button
The fields on the “Create New School” page are the same as on the “Edit School” page. State, County and District fields are populated with the values for your school district and are not editable.	ACTION: Highlight the fields
Enter the School Name, School Type, Address, City, and Zip. Required fields are denoted by an asterisk.	ACTION: Enter – The Best School, Regular School, 123 Main Street, Baltimore, 11112
The combination of the School Name and Zip is required to be unique.	
Use “Back to List” button to return to the “Manage Schools” page without saving the changes or use the “Create” button to create a new school record.	ACTION: Press Create
A confirmation dialog will be displayed, and then “Manage Schools” page will be displayed with the new school listed. Once the new school has been added to the school list, it can be selected from the Schools field when creating or editing user profiles.	ACTION: Press Close on confirmation dialog
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.
Generate School List	SCREEN: Show Sub Chapter Intro Screen
The “Generate School List” option under the “Employees” menu is available to School Managers and Directors only.	ACTION: Click on the Employees menu and highlight Generate School List sub-menu
It produces an Excel file containing information for all schools in your district.	ACTION: Click on the menu, spreadsheet opens
The following information is included for each school: School ID, School Name, District ID, District Name, State, County Name, City, Zip, Created On date, and Number of Employees currently assigned to the school.	SCREEN: Zoom in to show the values
As a reminder, please use the help email	SCREEN: Show Sub Chapter Exit

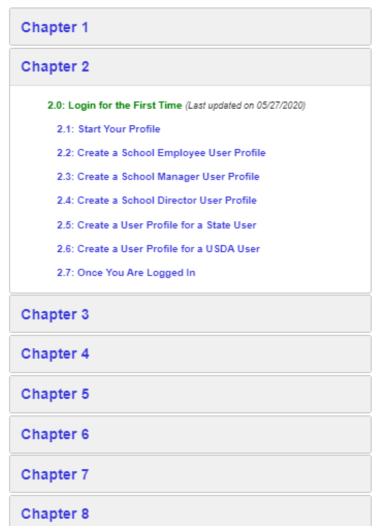
cnpntab@usda.gov for any questions or challenges you have while using our website.	Screen.
Manage School Districts	SCREEN: Show Sub Chapter Intro Screen
The “Manage School Districts” option under the “Employees” menu is available to School Directors only. It opens the “Manage School Districts” page which allows School Directors to view and manage the list of school districts in their state.	ACTION: Click on the Manage School Districts menu, logged in with DirectorLogin SCREEN: Manage School Districts page
Your district will be selected in the “School District” drop-down, but you can select any district in your state.	ACTION: Expand the drop-down, show all the districts
Select a district and press the “Edit School District” button to open the “Edit School District” page for the selected district.	ACTION: Select ANDALUSIA CITY, press the button
“State/Territory” and “County” fields on “Edit School District” page are prepopulated with the data for the selected school district and are not editable.	ACTION: Highlight the fields
The District Name and Zip fields contain the district information. Required fields are denoted by an asterisk.	ACTION: Highlight the fields
Use “Back to List” button to return to the “Manage School Districts” page without saving the changes or use the “Update” button to save.	ACTION: Click Back to List
School Directors can create new school districts within their state. Press the “Add New School District” button on “Manage School Districts” page to open the “Create New School District” page.	ACTION: Press the button
The fields on “Create New School District” page are the same as on the “Edit School District” page. The State field is populated with the value for your state and is not editable.	
Select the County and enter the District Name and Zip. Required fields are denoted by an asterisk.	ACTION: Select CLARKE COUNTY, enter Large District, 20002
The combination of the District Name and County is required to be unique.	
Use “Back to List” button to return to the “Manage School Districts” page without saving the changes or use the “Create” button to create a new school district record.	ACTION: Press Create
A confirmation dialog will be displayed,	ACTION: Press Close on confirmation dialog
and then “Manage School Districts” page will be displayed with the new school district listed in the drop-down.	SCREEN: Show the new district in the drop-down
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.
Training Director (Multiple School Districts) Functionality	SCREEN: Show Sub Chapter Intro Screen
Training Director users function as School Directors in multiple school districts. To receive a Training	***Contact Alla to change the DirectorLogin account into a Training***

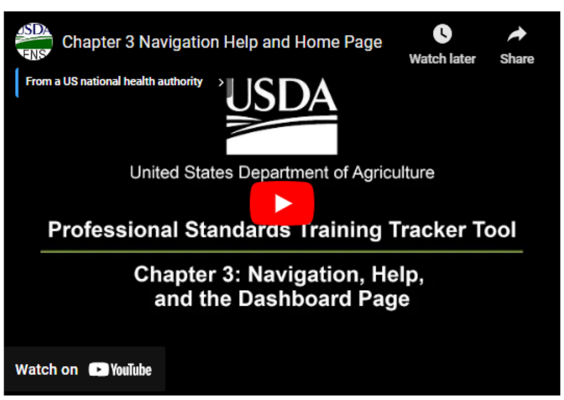
Director permission, you need to create a School Director account and contact FNS staff at cnpntab@usda.gov with the request to grant the Training Director (Multiple Districts) role.	***Director first*** SCREEN: Home page while logged in with DirectorLogin
Training Directors are not visible to any users except Administrators on any application pages or in reports.	
Training Directors are not included in the employee lists, and, therefore, it is not possible to log trainings for a Training Director.	
As a Training Director, if you need to log trainings for yourself, create a non-eAuthenticated employee profile in one of your school districts and use it to log trainings and print certificate of completion.	
The “Welcome” menu for the Training Director role only has two options: “User Profile” and “Log out”. The “Print My Certificate” option is not available since there are no logged training for this role.	ACTION: Click on the menu
Training Directors can manage multiple school districts, but they may only work within one school district at a time. The active school district – or School District in Use – is visible at all times in the banner below the main PSTTT menus.	SCREEN: Highlight the green strip under the menus where the district is listed
The “Switch District” button opens the “Switch School District” page which allows Training Directors to select one of their school districts. This page lists the District Name, State, County, and Zip code for all selected school districts assigned to the Training Director.	ACTION: Press the button SCREEN: Switch School District page
Change the radio button selection in the “Select” column and press the “Select District” button to change from one school district to another.	ACTION: Change the radio button selection, then the Select District button
The school district selected will immediately display below the main PSTTT menus as the School District in Use.	SCREEN: Dashboard page, highlight the district selected
Training Director’s districts are listed on their “User Profile” page.	ACTION: Click on Welcome / User Profile menu SCREEN: User Profile page
The assigned school district selection can be changed from the “School Districts” section of the “Edit User Profile” page, which is accessible by pressing the “Edit” button on “User Profile” page.	ACTION: Press the Edit button SCREEEN: Edit User Profile page
The first school district is assigned to a user when the initial School Director account is created, and other school districts can be assigned and removed on the “Edit User Profile” page.	ACTION: Scroll down to the Districts
Press the “Remove” button to remove the corresponding school district from your list.	ACTION: Press the button
Press the “Add Additional School District” button to add additional school districts using “Add Additional School District” pop-up dialog.	ACTION: Press the button
The following fields are available on Add Additional School District pop-up dialog. Required fields are denoted by the asterisk.	SCREEN: Pop-up dialog
State – required; select a state.	ACTION: Select Maryland

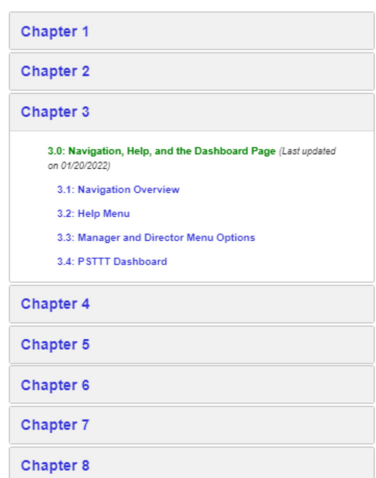
School District – required; select a district.	ACTION: Select a district
Press the Save button to add the selected school district or Cancel button to cancel.	ACTION: Press Save
Repeat these steps as needed to remove and/or select multiple school districts.	SCREEN: Dialog closes, DYRS is in the table
Press the "Update" button on "Edit User Profile" page to save your selections.	ACTION: Press the button SCREEN: Confirmation dialog – press Close, User Profile Page is displayed
This concludes our review of the School Manager and Director functionality. 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 Sub Chapter Exit Screen
	SCREEN: Show Closing Frame

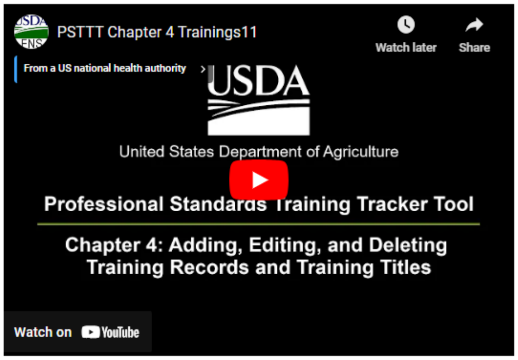
Training Video Screenshots







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Chapter 4: Adding, Editing, and Deleting Training Records and Training Titles
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Chapter 5 Reports
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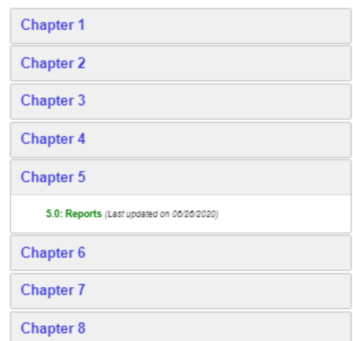
Chapter 5: Reports
Watch on YouTube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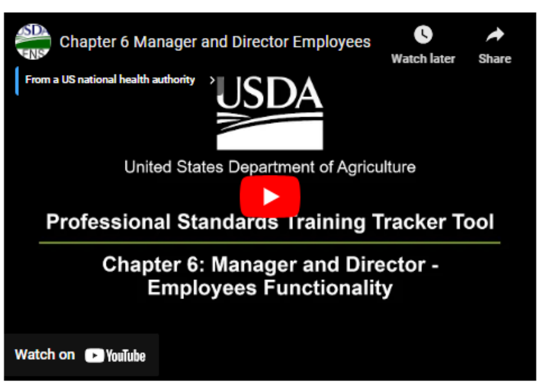
Chapter 6 Manager and Director Employees
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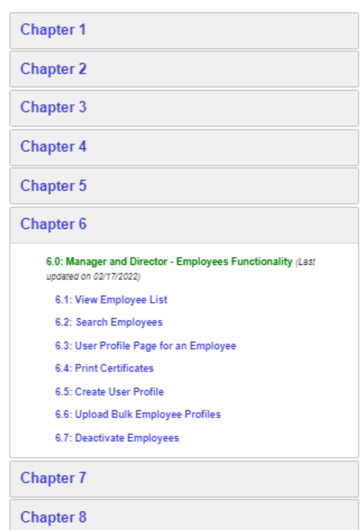
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8.0: School Manager and Director Functionality *(Last updated on 05/26/2022)*

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- 8.2 Manage Schools
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