



**Your Integrated Solution**



# **CETRA**

# **USER MANUAL**

**Centre for Education & Training Records Application**

CETRA V1.00BETA

UM V1.00

May 2012



## Before you begin...

- Before logging in to CETRA, ensure that the computer is up-to-date with the correct internet browser.
- CETRA will only work with **Internet Explorer 7 or newer**.
  - To check the version, open Internet Explorer, press ALT+H, click About Internet Explorer OR contact your IT Support Specialist.
  - If you are using an older version of Internet Explorer, contact IT Support to upgrade.





## Before you begin... (cont'd)

- To ensure that you can navigate through the system properly, you must enable **Compatibility View Mode** in **Internet Explorer**.
- Follow these instructions to do this yourself or contact your IT Support Specialist for assistance.
  - Click on "**Tools**" (Can't find tools? Press the ALT key on your keyboard to activate the menu)
  - Select "**Compatibility View Settings**"
  - In the "**Add this website**" field, type "**tcet.com**"
  - Click "**Add**"
  - Click "**Close**"
  - Refresh your browser





## Getting started

- To get started, launch **Internet Explorer**
- In the Address Bar, type: **cetra.tcet.com**
  - **TIP: Do not include [www](#) before the address**



- For easy access, add CETRA as a desktop shortcut *OR* Internet Explorer Favorite.
  - **Consult with IT Support about how to do this**



Login

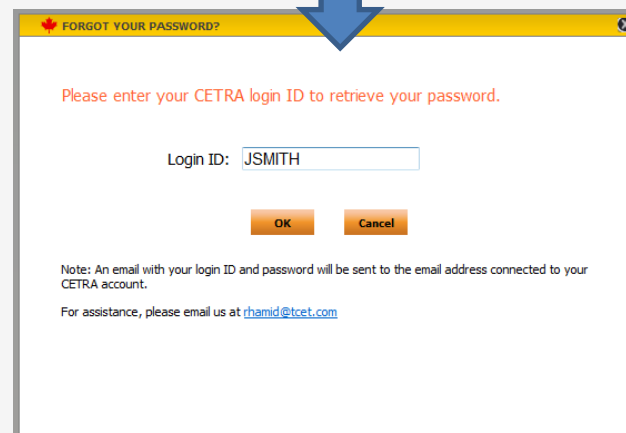
TIP: Does your login button look like this?  
If so, you're not using Internet Explorer.

## Logging in/Password Retrieval

- Logging in
- Use your assigned Login ID and password.
- Login ID: First Name Initial + Last Name.
  - E.g. JOHN SMITH -> **JSMITH**
  - TIP: The Login ID will automatically default to CAPS, ensure that Caps Lock is off.
- Default password: **Welcome00**.
  - For security reasons, the password should be changed often.
- Forgot your Password?
- To recover the password, click on the link below the login screen
- **Forgot your Password?**
- Follow the on-screen instructions, the password will automatically be emailed to the email address on file.



The login screen features the CETRA logo at the top right and a yellow 3D figure on the left. A speech bubble prompts the user to "Enter your Login ID and Password to sign in." Below this is a blue login box with fields for "Login ID:" and "Password:", and buttons for "Clear" and "Login". A small note at the bottom of the box states: "Internet Explorer ONLY! Password is case sensitive. Forgot your Password?"



The "FORGOT YOUR PASSWORD?" screen has a yellow header bar. It prompts the user to "Please enter your CETRA login ID to retrieve your password." There is a text input field for "Login ID:" containing "JSMITH". Below the field are "OK" and "Cancel" buttons. At the bottom, a note states: "Note: An email with your login ID and password will be sent to the email address connected to your CETRA account." and provides contact information: "For assistance, please email us at [rhamid@tcet.com](mailto:rhamid@tcet.com)".





## CETRA Interface

### Main Menu

All functional menus are contained within the buttons seen in this section. Buttons will vary depending on the user account/role.

### User Information

User first + last name  
Log-out button

### Home

Button  
will clear  
all active  
screens



### Shortcut Menu

Shortcuts  
to most  
commonly  
used  
menus

### Footer

Application version/Copyright information

### Lower Toolbar

**Need Help:** Email trigger to CETRA support team for assistance

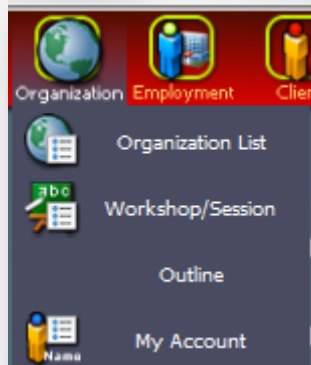
**How Do I:** Quick usage tips

**Feedback:** Email trigger to CETRA support team to provide feedback

**Messages:** Notifications/Visits menu

## CETRA Interface: Main Menu

### Organization



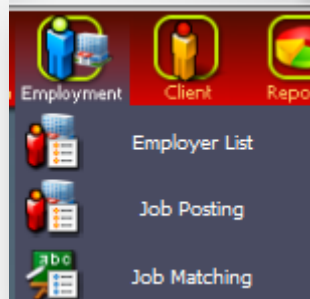
**Organization List:** (TCET)  
Company and Site setup

**Workshop/Session**

**Outline:**  
Setup for  
Workshops/Sessions

**My Account:**  
Password reset, email  
and service verification

### Employment

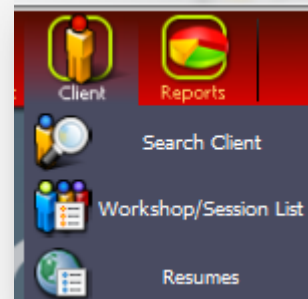


**Employer List:** (ES)  
company/contact setup

**Job Posting:**  
(ES) setup for jobs

**Job Matching:**  
(ES) Client – job  
matching

### Client

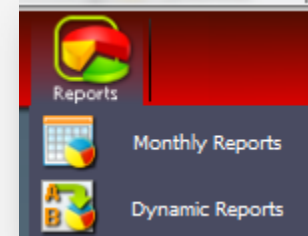


**Search Client:**  
Search find client, edit  
file, create new file.

**Workshop/Session list:**  
Attendance, print list

**Resumes:**  
(ES) Client resume  
management

### Reports



**Monthly Reports:**  
Pre-formatted monthly  
reports

**Dynamic Reports**  
Ad hoc reporting system

*Menu options may vary depending on user roles and accounts*



## CETRA Interface: Lower Toolbar

If assistance is required with a client file or workshop/session, use the **Need Help** section to send an email to the Help Desk.

*Ensure that the **REF#** or **Session Code** is quoted*

For quick tips, reminders and troubleshooting with simple tasks, check the **How Do I** section to find a solution prior to contacting the Help Desk.

To provide feedback or suggestions about the system, use the **Feedback** section to send an email.

**Need help?**

If you need assistance please fill in the information below or call us at:  
1-866-277-5462 or  
905-949-0049 ext. 4000.

To: CETRA Helpdesk

Organization:

Reference No.:

Please assist:

Cancel Send

**How do I ...**

Q: [navigate through CETRA, it seems like the buttons are not working.](#)

Q: [change my password?](#)

Q:

Q:

Q:

Q:

**Feedback**

Organization: Centre for Education & Training

User Name: JOHN SMITH

Feedback:

Cancel Send








## Messages: Notifications/Updates

- The **News** tab of the **Messages** screen (*Lower Toolbar*) will appear by default upon Login.
- Notifications and system updates from the CETRA development team will be posted in this section.
- This window can be opened at any time by clicking the Messages button in the lower toolbar.
  - New/unread messages will be **Bold**.
  - The counter will reflect the number of unread messages.



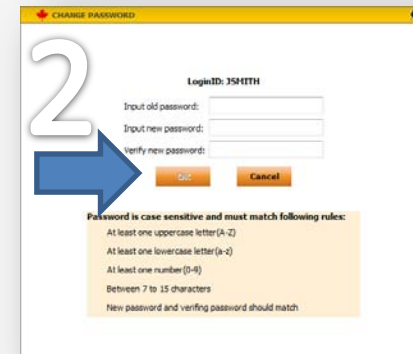
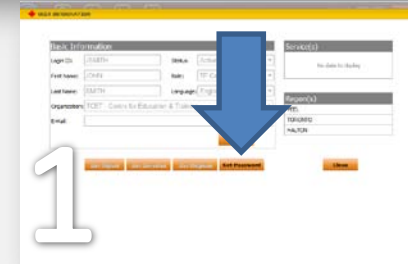


## My Account: User Account Information

Once logged in, click the  button from the shortcut menu, then select your username.

This section will allow you to:

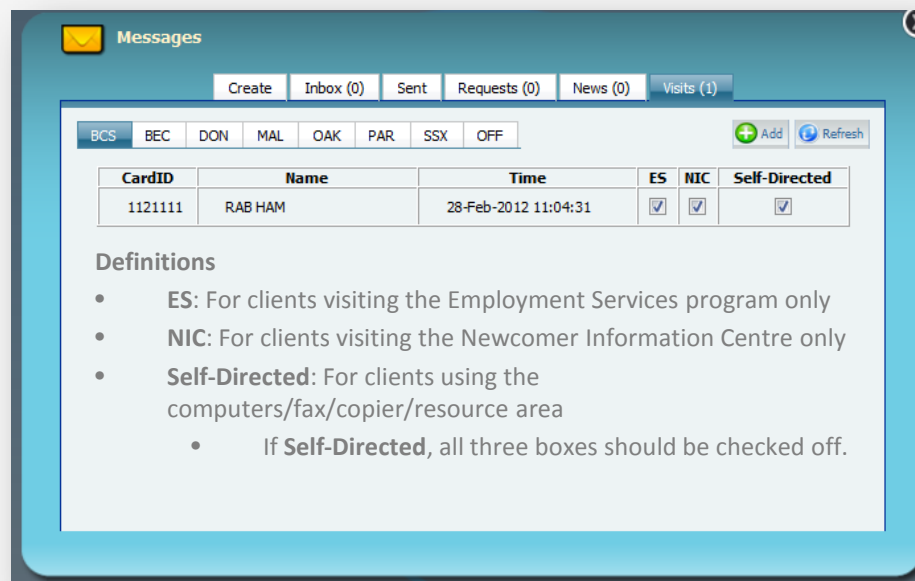
- View the email address on file
  - If there is a typographical error in the email address, contact CETRA staff.
- View your Service(s)
  - Your department will be listed here, if an error is notice, contact CETRA staff.
- Change your password
  1. To do this, click on the “Set Password” Button
  2. Follow the instructions on screen.





## Visits: Client Turnstile

- When a client visits a site, they are required to scan their TCET Client Card at the front desk barcode scanner. The information from their card is sent to CETRA. The information collected here is vital for the reporting process to ensure accuracy.
- The scan record can be viewed in the **Visits** tab. This section is accessed through the **Messages** window (Lower Toolbar)
- Select the abbreviated tab for your site. (i.e. Sussex = **SSX**)
- Check the boxes next to the scan record accordingly
- By default, a scan is recorded as a “**self-directed**” service, giving a count to both ES+NIC.\*
- To amend the scan record, click or unclick the checkbox.



**Messages**

Create | Inbox (0) | Sent | Requests (0) | News (0) | **Visits (1)**

BCS | BEC | DON | MAL | OAK | PAR | **SSX** | OFF

+ Add | Refresh

| CardID  | Name    | Time                 | ES                                  | NIC                                 | Self-Directed                       |
|---------|---------|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 1121111 | RAB HAM | 28-Feb-2012 11:04:31 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

**Definitions**


- **ES:** For clients visiting the Employment Services program only
- **NIC:** For clients visiting the Newcomer Information Centre only
- **Self-Directed:** For clients using the computers/fax/copier/resource area
  - If **Self-Directed**, all three boxes should be checked off.

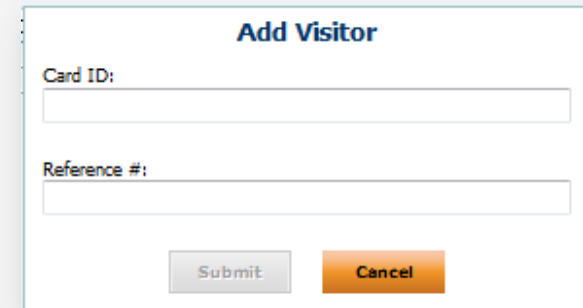
*Note: (NIC Program) If initial daily scan is self-directed, NIC Survey should not include “In House” Services.*

*\*Defaults vary by site.*



## Visits: Client Turnstile (cont'd)

- To log a visit manually, use the  button.
- A dialogue box will appear with 2 fields, enter the **Card ID** – OR – client **REF#** and press submit.
  - Note: Client file must exist in order to log a manual visit.
  - Note: If client is not a card-holder, use REF# to log a manual visit.
- To remove a record from the daily count, simply clear all 3 check boxes next to the record.
  - Note: Scan records can be viewed and amended for 2 days.
  - Note: If a scan has been recorded more than once a day, only the first record of the day will be counted.

A screenshot of a web-based dialog box titled "Add Visitor". It contains two input fields: "Card ID:" and "Reference #:". Below the fields are two buttons: "Submit" and "Cancel".

**Add Visitor**

Card ID:

Reference #:

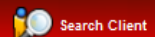
Troubleshooting: If scan records do not appear in CETRA:

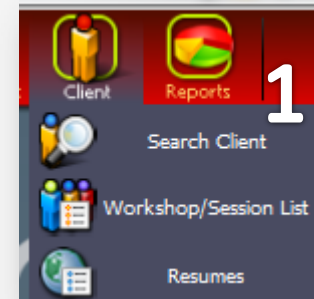
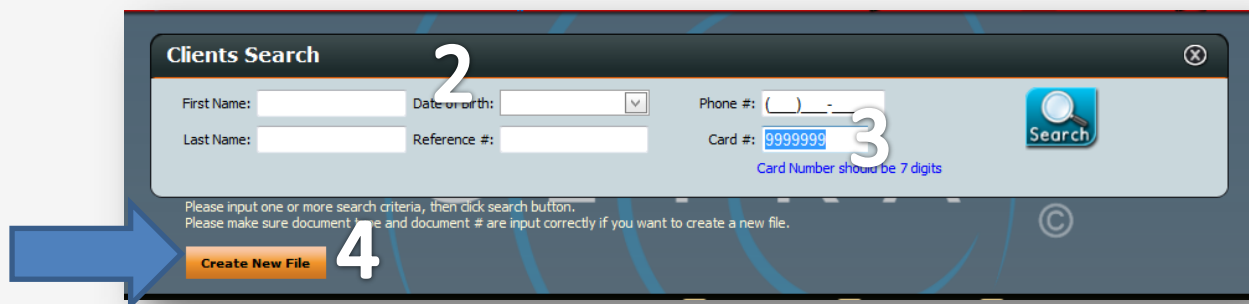
- a) Ensure that **LogVisits** application is running
- b) Restart the **LogVisits** application.



## Search Client: Create New File


If a client is not a card-holder, their file should be searched using the Search Client menu

1. From the **Client** menu (or shortcut), select  **Search Client**
2. Enter search criteria to find file, start with a vague search.
3. If file does not exist, enter a new 7-digit card number in the **Card#** field. (For phone clients, see [Create New File Using Generic Card#](#))
4. Click **Create New File**.

**Clients Search**

First Name:  Date of birth:  Phone #:

Last Name:  Reference #:  Card #:  

Card Number should be 7 digits

Please input one or more search criteria, then click search button.  
Please make sure document name and document # are input correctly if you want to create a new file.

**Create New File**





## Search Client: Create New File Using Generic Card#


- For clients wishing to register over the phone, use generic a **Card #** to create a file
- Based on the site, use one of the following:
- **NIC-Offsite/Itinerant: 0000000**
- **Mississauga: 1111111**
- **Malton: 2222222**
- **Oakville: 3333333**
- **Brampton South: 4444444**
- **Brampton East: 5555555**
- **Parliament: 6666666**
- **Don Mills: 7777777**

### Clients Search

First Name:

Date of Birth:

Phone #:



Last Name:

Reference #:

Card #:

Card Number should be 7 digits

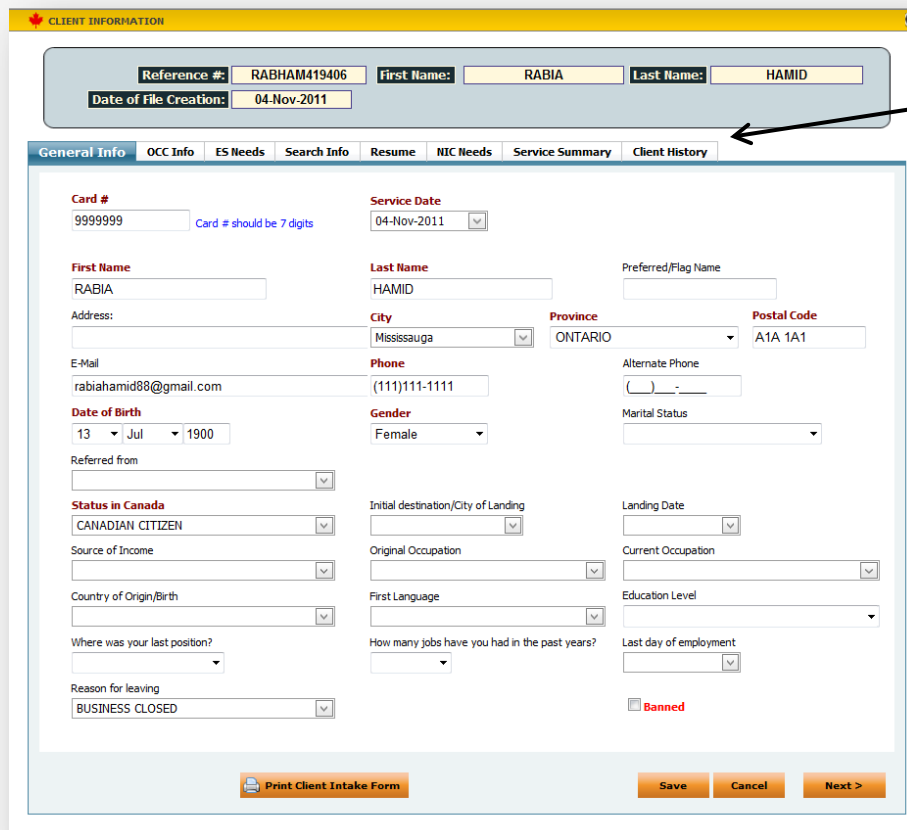
Please input one or more search criteria, then click search button.  
Please make sure document type and document # are input correctly if you want to create a new file.

Create New File



## Create New File (cont'd)

- Begin entering the client's information from the Registration Form into the **General Information** tab
  - NOTE: **Red** fields are mandatory
- Save the file in order to generate a **Reference #**
  - REF#s** are unique to each client file and should be used in combination with the **Card#** to identify the client.
- To print a copy of the registration form, click **Print Client Intake Form**
  - NOTE: Form can only be printed once file is saved

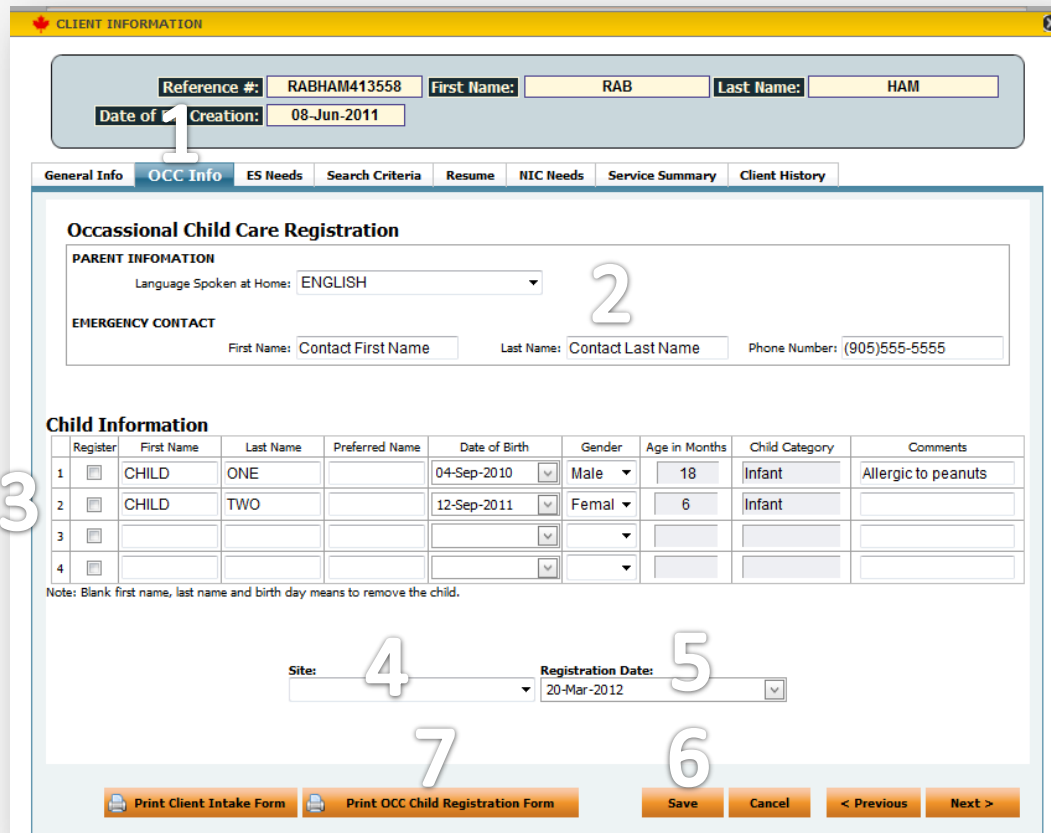


Tabs will vary depending on user account



## Client File: Occasional Child Care (NIC OCC)

1. To register a child for OCC services, click on the **OCC Info** tab of the Client File
2. Input the information (**Parent Info, Emergency Contact, Child Information**)
3. Click check-box next to the child who will be registered
4. Select the OCC site
5. Select the **Registration Date**
6. Press **Save**
7. Print **OCC Child Registration** Form for parent's signature



**CLIENT INFORMATION**

Reference #: RABHAM413558 First Name: RAB Last Name: HAM  
 Date of Creation: 08-Jun-2011

General Info **OCC Info** ES Needs Search Criteria Resume NIC Needs Service Summary Client History

**Occasional Child Care Registration**

**PARENT INFORMATION**  
 Language Spoken at Home: ENGLISH

**EMERGENCY CONTACT**  
 First Name: Contact First Name Last Name: Contact Last Name Phone Number: (905)555-5555

**Child Information**

| Register                   | First Name | Last Name | Preferred Name | Date of Birth | Gender | Age in Months | Child Category | Comments            |
|----------------------------|------------|-----------|----------------|---------------|--------|---------------|----------------|---------------------|
| 1 <input type="checkbox"/> | CHILD      | ONE       |                | 04-Sep-2010   | Male   | 18            | Infant         | Allergic to peanuts |
| 2 <input type="checkbox"/> | CHILD      | TWO       |                | 12-Sep-2011   | Femal  | 6             | Infant         |                     |
| 3 <input type="checkbox"/> |            |           |                |               |        |               |                |                     |
| 4 <input type="checkbox"/> |            |           |                |               |        |               |                |                     |

Note: Blank first name, last name and birth day means to remove the child.

Site: Registration Date: 20-Mar-2012

Print Client Intake Form Print OCC Child Registration Form Save Cancel < Previous Next >

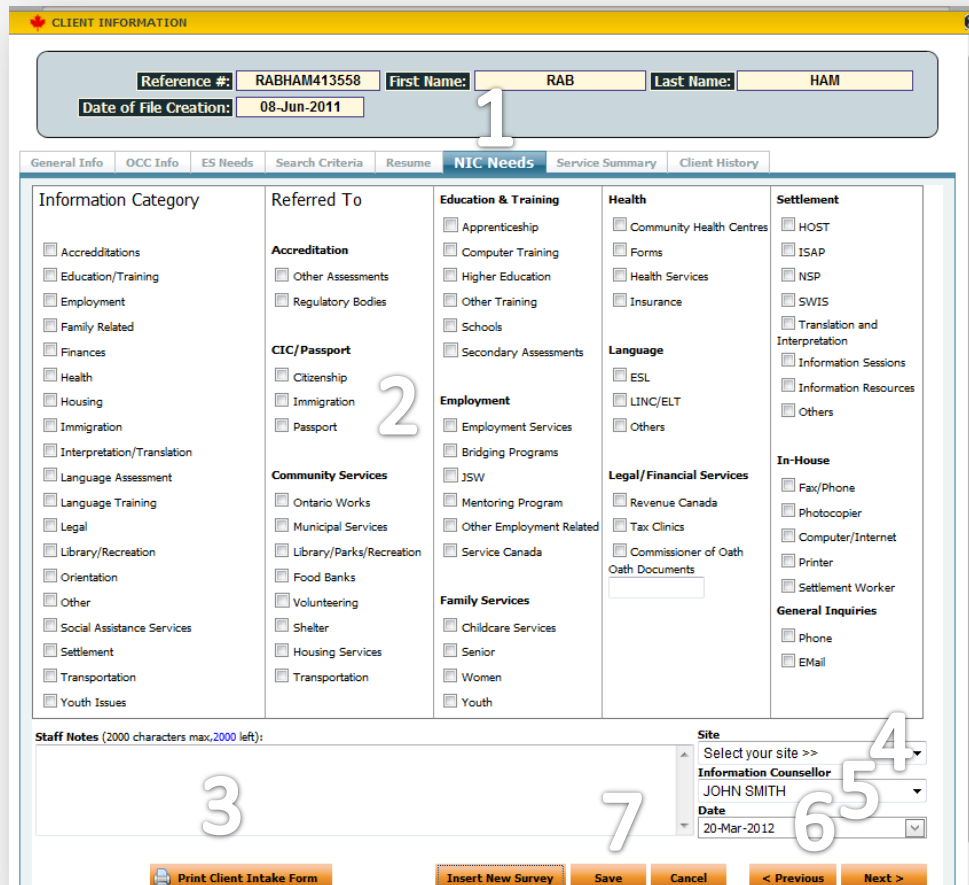
*Children under 19 months cannot be registered for this service*



## Client File: NIC Needs (NIC)

1. To record NIC services using the Survey, click **NIC Needs** tab in Client File
2. Input data from NIC Survey using check-boxes
3. Enter **Staff Notes**
4. Select **Site**
5. Select **Information Counselor** name or *Self-Directed*
6. Select **date** of service
7. Press **Save**

To insert a new survey, click **Insert New Survey** and repeat the process.



**CLIENT INFORMATION**

Reference #: RABHAM413558 First Name: RAB Last Name: HAM  
 Date of File Creation: 08-Jun-2011

General Info | OCC Info | ES Needs | Search Criteria | Resume | **NIC Needs** | Service Summary | Client History

| Information Category   | Referred To   | Education & Training   | Health   | Settlement  |
|--|---|--|--|---|
| <input type="checkbox"/> Accreditations<br><input type="checkbox"/> Education/Training<br><input type="checkbox"/> Employment<br><input type="checkbox"/> Family Related<br><input type="checkbox"/> Finances<br><input type="checkbox"/> Health<br><input type="checkbox"/> Housing<br><input type="checkbox"/> Immigration<br><input type="checkbox"/> Interpretation/Translation<br><input type="checkbox"/> Language Assessment<br><input type="checkbox"/> Language Training<br><input type="checkbox"/> Legal<br><input type="checkbox"/> Library/Recreation<br><input type="checkbox"/> Orientation<br><input type="checkbox"/> Other<br><input type="checkbox"/> Social Assistance Services<br><input type="checkbox"/> Settlement<br><input type="checkbox"/> Transportation<br><input type="checkbox"/> Youth Issues | <b>Accreditation</b><br><input type="checkbox"/> Other Assessments<br><input type="checkbox"/> Regulatory Bodies<br><br><b>CIC/Passport</b><br><input type="checkbox"/> Citizenship<br><input type="checkbox"/> Immigration<br><input type="checkbox"/> Passport<br><br><b>Community Services</b><br><input type="checkbox"/> Ontario Works<br><input type="checkbox"/> Municipal Services<br><input type="checkbox"/> Library/Parks/Recreation<br><input type="checkbox"/> Food Banks<br><input type="checkbox"/> Volunteering<br><input type="checkbox"/> Shelter<br><input type="checkbox"/> Housing Services<br><input type="checkbox"/> Transportation | <input type="checkbox"/> Apprenticeship<br><input type="checkbox"/> Computer Training<br><input type="checkbox"/> Higher Education<br><input type="checkbox"/> Other Training<br><input type="checkbox"/> Schools<br><input type="checkbox"/> Secondary Assessments<br><br><b>Employment</b><br><input type="checkbox"/> Employment Services<br><input type="checkbox"/> Bridging Programs<br><input type="checkbox"/> JSW<br><input type="checkbox"/> Mentoring Program<br><input type="checkbox"/> Other Employment Related<br><input type="checkbox"/> Service Canada<br><br><b>Family Services</b><br><input type="checkbox"/> Childcare Services<br><input type="checkbox"/> Senior<br><input type="checkbox"/> Women<br><input type="checkbox"/> Youth | <input type="checkbox"/> Community Health Centres<br><input type="checkbox"/> Forms<br><input type="checkbox"/> Health Services<br><input type="checkbox"/> Insurance<br><br><b>Language</b><br><input type="checkbox"/> ESL<br><input type="checkbox"/> LINC/ELT<br><input type="checkbox"/> Others<br><br><b>Legal/Financial Services</b><br><input type="checkbox"/> Revenue Canada<br><input type="checkbox"/> Tax Clinics<br><input type="checkbox"/> Commissioner of Oath<br><input type="checkbox"/> Oath Documents | <input type="checkbox"/> HOST<br><input type="checkbox"/> ISAP<br><input type="checkbox"/> NSP<br><input type="checkbox"/> SWIS<br><input type="checkbox"/> Translation and Interpretation<br><input type="checkbox"/> Information Sessions<br><input type="checkbox"/> Information Resources<br><input type="checkbox"/> Others<br><br><b>In-House</b><br><input type="checkbox"/> Fax/Phone<br><input type="checkbox"/> Photocopier<br><input type="checkbox"/> Computer/Internet<br><input type="checkbox"/> Printer<br><input type="checkbox"/> Settlement Worker<br><br><b>General Inquiries</b><br><input type="checkbox"/> Phone<br><input type="checkbox"/> EMail |

Staff Notes (2000 characters max, 2000 left):

Site: Select your site >>  
 Information Counselor: JOHN SMITH  
 Date: 20-Mar-2012

Print Client Intake Form | Insert New Survey | Save | Cancel | < Previous | Next >



## Client File: Employment Services Needs

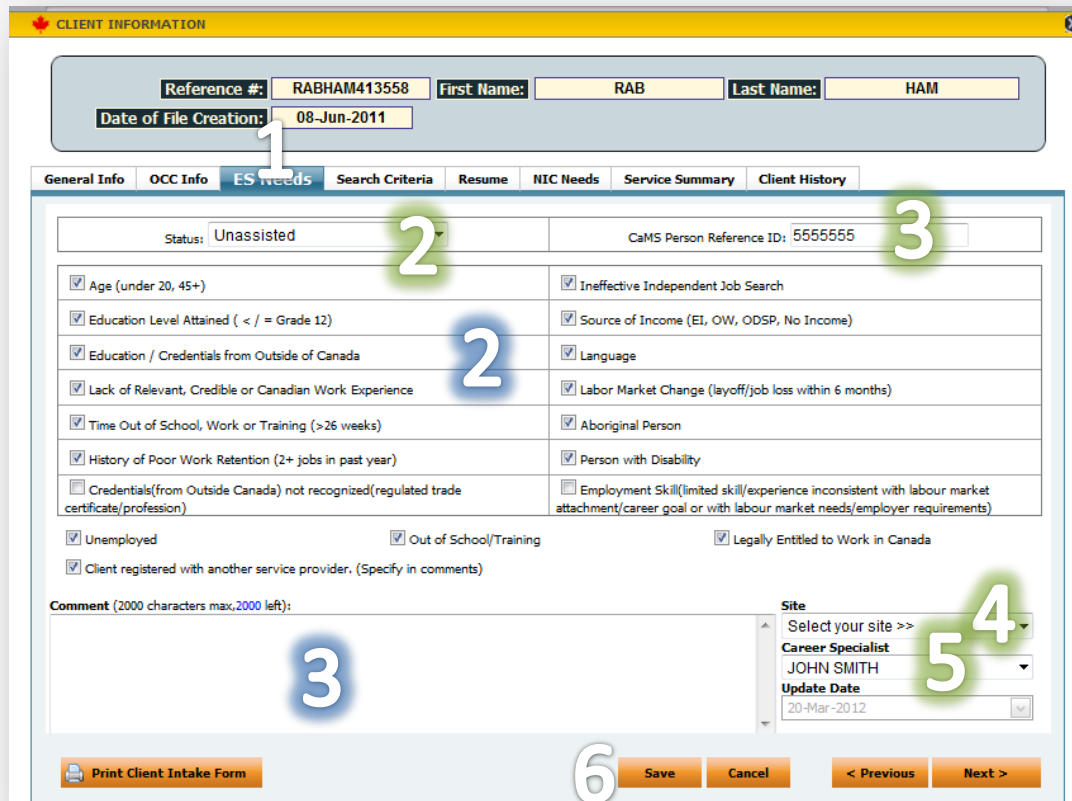
1. Click on the **ES Needs** Tab in the Client File

### R&I Staff

2. Complete *Suitability Factors* using check-boxes
3. Input **Comments**

### Career Specialists

2. Assign a **Status**  
(Unassisted, Assisted (Job Search, JMPI, In Placement, Employed, Retention, In Training), Inactive)
3. Input **CaMS Person Reference ID#**
4. Select **Site**
5. Select **Career Specialist** (*Assisted Clients ONLY*)
6. **Save**



**CLIENT INFORMATION**

Reference #: RABHAM413558 First Name: RAB Last Name: HAM  
 Date of File Creation: 08-Jun-2011

General Info OCC Info **ES Needs** Search Criteria Resume NIC Needs Service Summary Client History

Status: Unassisted CaMS Person Reference ID: 5555555

|  |   |
|--|---|
| <input checked="" type="checkbox"/> Age (under 20, 45+)  | <input checked="" type="checkbox"/> Ineffective Independent Job Search  |
| <input checked="" type="checkbox"/> Education Level Attained (< / = Grade 12)                                      | <input checked="" type="checkbox"/> Source of Income (EI, OW, ODSP, No Income)  |
| <input checked="" type="checkbox"/> Education / Credentials from Outside of Canada                                 | <input checked="" type="checkbox"/> Language  |
| <input checked="" type="checkbox"/> Lack of Relevant, Credible or Canadian Work Experience                         | <input checked="" type="checkbox"/> Labor Market Change (layoff/job loss within 6 months)   |
| <input checked="" type="checkbox"/> Time Out of School, Work or Training (>26 weeks)                               | <input checked="" type="checkbox"/> Aboriginal Person   |
| <input checked="" type="checkbox"/> History of Poor Work Retention (2+ jobs in past year)                          | <input checked="" type="checkbox"/> Person with Disability  |
| <input type="checkbox"/> Credentials (from Outside Canada) not recognized (regulated trade certificate/profession) | <input type="checkbox"/> Employment Skill (limited skill/experience inconsistent with labour market attachment/career goal or with labour market needs/employer requirements) |

☒ Unemployed ☒ Out of School/Training ☒ Legally Entitled to Work in Canada  
☒ Client registered with another service provider. (Specify in comments)

Comment (2000 characters max, 2000 left):

Site: Select your site >>  
 Career Specialist: JOHN SMITH  
 Update Date: 20-Mar-2012

Print Client Intake Form Save Cancel < Previous Next >

Note: Contents of this page will only appear on the Client Intake Form once saved





## Client File: Search Criteria - Job Search Profile (ES)

### Career Specialists

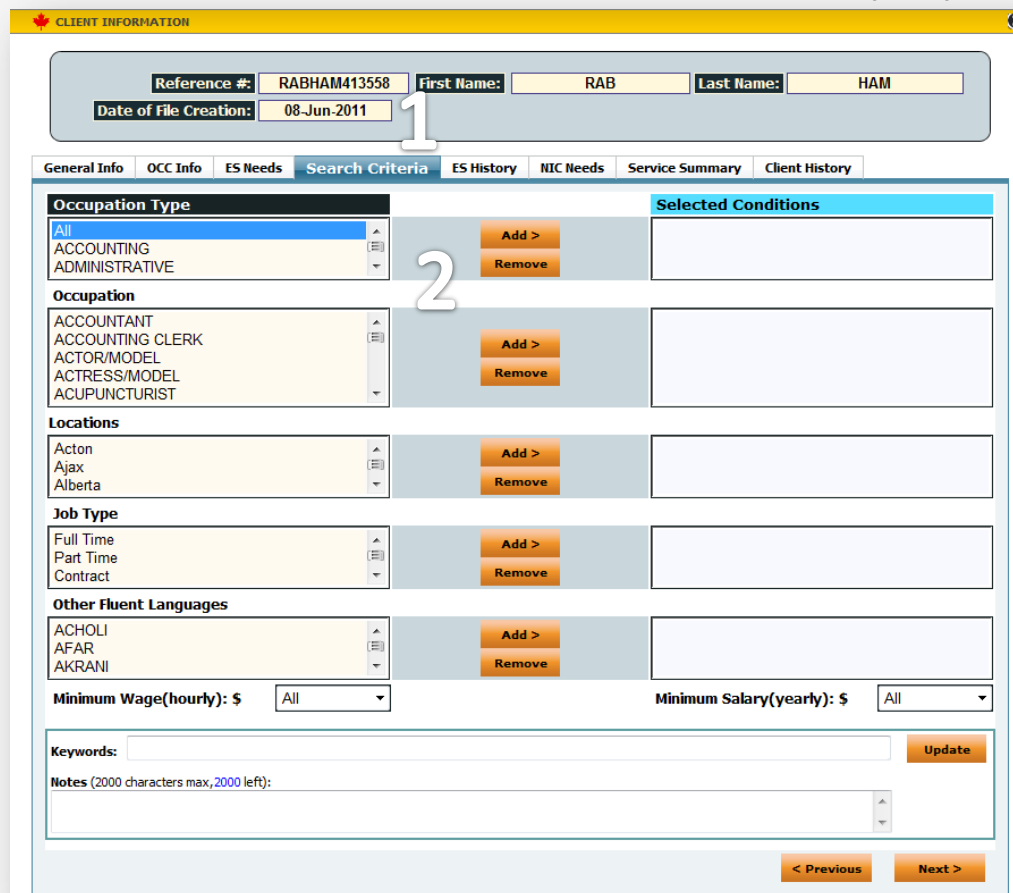
This section must be completed in order for the client to be considered for job matching.

1. Click on the **Search Criteria** Tab in the Client File
2. Select criteria from the left columns, use **Add>** button to bring to right

- To find an **Occupation**, Click on an **Occupation Type** – this will update the list of Occupations

### Tips:

- Occupation Type/Occupation – Select criteria from at least 1 or both of these sections in order for the client to be matched
- Location: Select only if client is restrictive of employment location
- Job Type: Select only if client is restrictive of job type
- Other Fluent Languages: Select all that apply (omit English)
- Wage/Salary: input minimum based on client's requirement
- Keywords: input skills, certificates, etc. Separate with comma



The screenshot shows the 'CLIENT INFORMATION' window with the 'Search Criteria' tab selected. The form contains several sections for selecting search criteria:

- Reference #:** RABHAM413558, **First Name:** RAB, **Last Name:** HAM, **Date of File Creation:** 08-Jun-2011.
- General Info** | **OCC Info** | **ES Needs** | **Search Criteria** | **ES History** | **NIC Needs** | **Service Summary** | **Client History**
- Occupation Type**: A dropdown menu with 'All' selected. To the right are 'Add >' and 'Remove' buttons.
- Occupation**: A list of occupations including ACCOUNTANT, ACCOUNTING CLERK, ACTOR/MODEL, ACTRESS/MODEL, and ACUPUNCTURIST. To the right are 'Add >' and 'Remove' buttons.
- Locations**: A list of locations including Acton, Ajax, and Alberta. To the right are 'Add >' and 'Remove' buttons.
- Job Type**: A list of job types including Full Time, Part Time, and Contract. To the right are 'Add >' and 'Remove' buttons.
- Other Fluent Languages**: A list of languages including ACHOLI, AFAR, and AKRANI. To the right are 'Add >' and 'Remove' buttons.
- Minimum Wage(hourly): \$**: All, **Minimum Salary(yearly): \$**: All.
- Keywords:** A text input field with an 'Update' button.
- Notes** (2000 characters max, 2000 left): A text area.
- Navigation buttons: < Previous, Next >

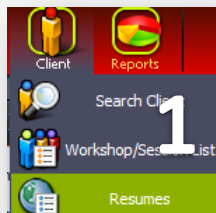
Note: Up to 3 criteria can be selected for each list

Note: Information is saved immediately

Tip: To quickly jump to a criteria, use your keyboard to type the first letter

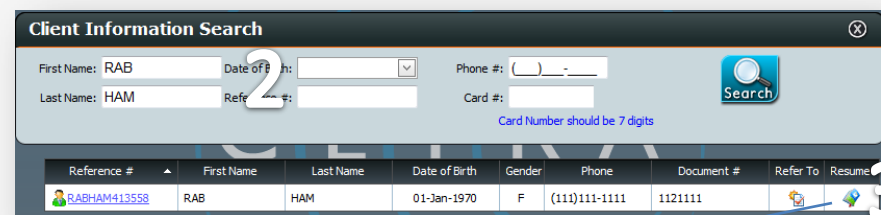
20

## Client File: Resume Management (ES)



### Career Specialists

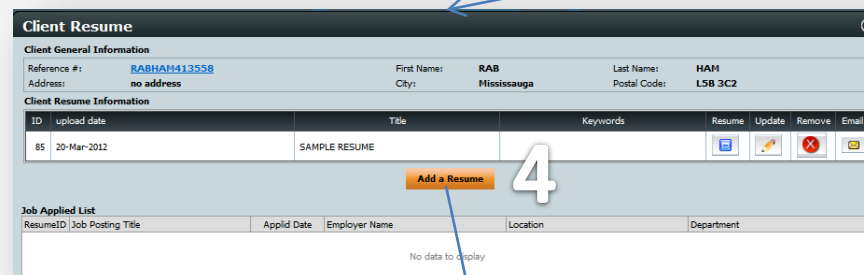
1. From the **Client** menu, select **Resumes**
  2. Search-find the client file
  3. Click the Resume button in the search result
- This section can also be accessed via **ES History**



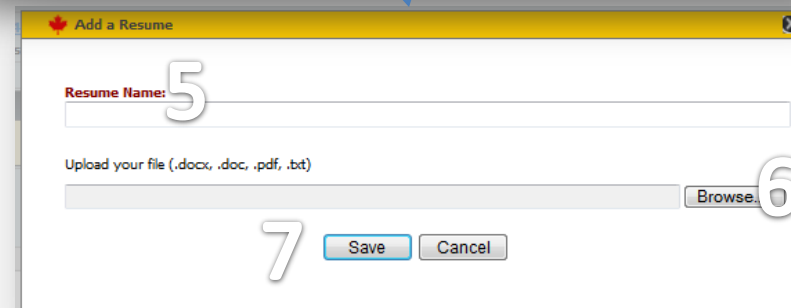
| Reference #  | First Name | Last Name | Date of Birth | Gender | Phone         | Document # | Refer To | Resume |
|--------------|------------|-----------|---------------|--------|---------------|------------|----------|--------|
| RABHAM413558 | RAB        | HAM       | 01-Jan-1970   | F      | (111)111-1111 | 1121111    |          |        |

4. To upload a resume, click **Add a Resume**
5. Enter a name in the **Resume Name** field  
(Usually resume type or occupation)
6. Click **Browse** and navigate to the file on your local computer
7. Press **Save**

- To view/update/remove use the toolbar
- Email function to send resume to employer is also available in this section.

| ID | upload date | Title         | Keywords | Resume | Update | Remove | Email |
|----|-------------|---------------|----------|--------|--------|--------|-------|
| 65 | 20-Mar-2012 | SAMPLE RESUME |          |        |        |        |       |






## Client File: Service Summary

- The **Service Summary** tab is a view-only list of Workshops/Sessions that a client is currently enrolled in. (upcoming only)

- To refer the client to a workshop/session, click

**Refer to**

(See **Workshop/Session: Referral** for complete referral instructions)


**CLIENT INFORMATION**

**Reference #:** RABHAM413558
 **First Name:** RAB
 **Last Name:** HAM

**Date of File Creation:** 08-Jun-2011

**General Info**
**OCC Info**
**ES Needs**
**Search Criteria**
**Resume**
**NIC Needs**
**Service Summary**
**Client History**

**Referred to Workshops**

| Date of Referral | Program | Status   | Workshop Code             | Service Provider Site                 | Start Date  | Workshop Days |
|------------------|---------|----------|---------------------------|---------------------------------------|-------------|---------------|
| 08-Jun-2011      |         | Referral |                           | TCET-SSX - 50 Burnhamthorpe Road West | 08-Jun-2011 | We, Th        |
| 11-Jul-2011      |         | Referral |                           | TCET-BCS - 601-7700 Hurontario Street | 22-Jul-2011 | Fr            |
| 09-Feb-2012      | LD      | Referral | LD-TCETBCS11002(L test 1) | TCET-BCS - 601-7700 Hurontario Street | 17-Jan-2012 | Tu            |

**Appointment with Staff**

| Date of Referral   | Placement Category | Program | Service Provider Site | Reason |
|--------------------|--------------------|---------|-----------------------|--------|
| No data to display |                    |         |                       |        |

**Referred to other EO or Community Service**

| Date               | Program Name |
|--------------------|--------------|
| No data to display |              |

Refer to


< Previous

Next >



## Client File: Client History

- The Client History tab is a view-only list of all actions taken in this client file.
- The following items can be viewed in this tab:
  - Client's file creation date
  - Workshop Referral
  - Workshop Attendance



Reference #: **RABHAM413558**

First Name: **RAB**

Last Name: **HAM**


Date of File Creation: **08-Jun-2011**


General Info
OCC Info
ES Needs
Search Criteria
Resume
NIC Needs
Service Summary
Client History

| Event History |        |                      |                       |                                       |   |
|---------------|--------|----------------------|-----------------------|---------------------------------------|---|
| Date          | Progra | Event                | Course                | Site                                  | Comments                                  |
| 09-Feb-2012   | LD     | Referral             | LD-TCETBCS11002(L ... | TCET-BCS - 601-7700 Hurontario Street | Enroll in class LD-TCETBCS11002(L test 1) |
| 09-Feb-2012   | LD     | Not Attending        | LD-TCETBCS11002(L ... | TCET-BCS - 601-7700 Hurontario Street |   |
| 09-Feb-2012   | LD     | Referral             | LD-TCETBCS11002(L ... | TCET-BCS - 601-7700 Hurontario Street | Enroll in class LD-TCETBCS11002(L test 1) |
| 09-Feb-2012   | ES     | Withdraw             | EO-TCETMAL11017(L...  | TCET-MAL - 3233 Brandon Gate Drive    | Class No Longer Exists                    |
| 09-Feb-2012   | LD     | Not Attending        | LD-TCETBCS11001(L ... | TCET-BCS - 601-7700 Hurontario Street |   |
| 09-Feb-2012   | LD     | Referral             | LD-TCETBCS11001(L ... | TCET-BCS - 601-7700 Hurontario Street | Enroll in class LD-TCETBCS11001(L test 1) |
| 16-Jan-2012   | ES     | Not Attending        | EO-TCETSSX11023(L ... | TCET-SSX - 50 Burnhamthorpe Road West |   |
| 16-Jan-2012   | ES     | Referral             | EO-TCETSSX11023(L ... | TCET-SSX - 50 Burnhamthorpe Road West | Enroll in class EO-TCETSSX11023(L Asb...  |
| 16-Jan-2012   | ES     | Not Attending        | EO-TCETSSX11023(L ... | TCET-SSX - 50 Burnhamthorpe Road West |   |
| 16-Jan-2012   | ES     | Referral             | EO-TCETSSX11023(L ... | TCET-SSX - 50 Burnhamthorpe Road West | Enroll in class EO-TCETSSX11023(L Asb...  |
| 16-Jan-2012   | ES     | Remove from Waitlist |                       | TCET-SSX - 50 Burnhamthorpe Road West | Refer to class                            |
| 16-Jan-2012   | ES     | Withdraw             | EO-TCETDON11022(L...  | TCET-DON - 1090 Don Mills Road        | Out of Country/Vacation                   |
| 25-Oct-2011   | ES     | Put on Waitlist      |                       | TCET-SSX - 50 Burnhamthorpe Road West | Transfer(Update)                          |
| 25-Oct-2011   | ES     | Referral             | EO-TCETDON11022(L...  | TCET-DON - 1090 Don Mills Road        | Enroll in class EO-TCETDON11022(L)        |
| 20-Oct-2011   | ES     | Attending            | EO-TCETDON11022(L...  | TCET-DON - 1090 Don Mills Road        | Attending in class                        |
| 05-Oct-2011   | ES     | Put on Waitlist      |                       | TCET-SSX - 50 Burnhamthorpe Road West | Transfer: Class Full                      |

Page 1 of 2 (23 items)

<
1
>

 Attendance History

 Print Client History

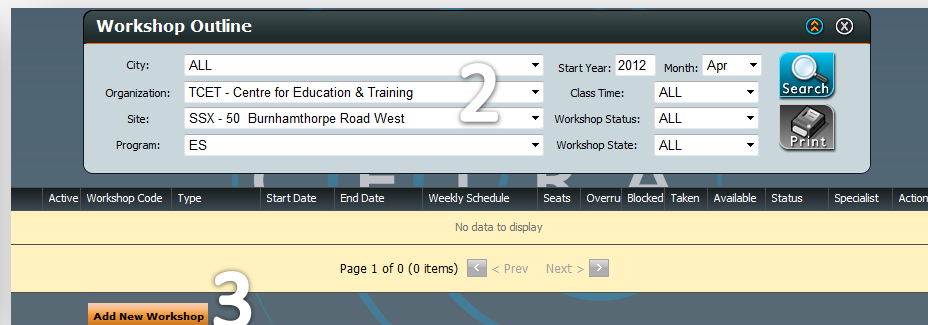
< Previous



## Workshop/Session: Setup

In order to refer a client to a workshop/session, it must first be setup.

1. From the **Organization** menu, click on **Workshop Outline**.
2. Using the search criteria, find your workshop to avoid duplication.
3. If it does not exist, click



**Add New Workshop**

4. Input all basic information.

NOTE: **Red** fields are mandatory

5. Input Weekly Schedule

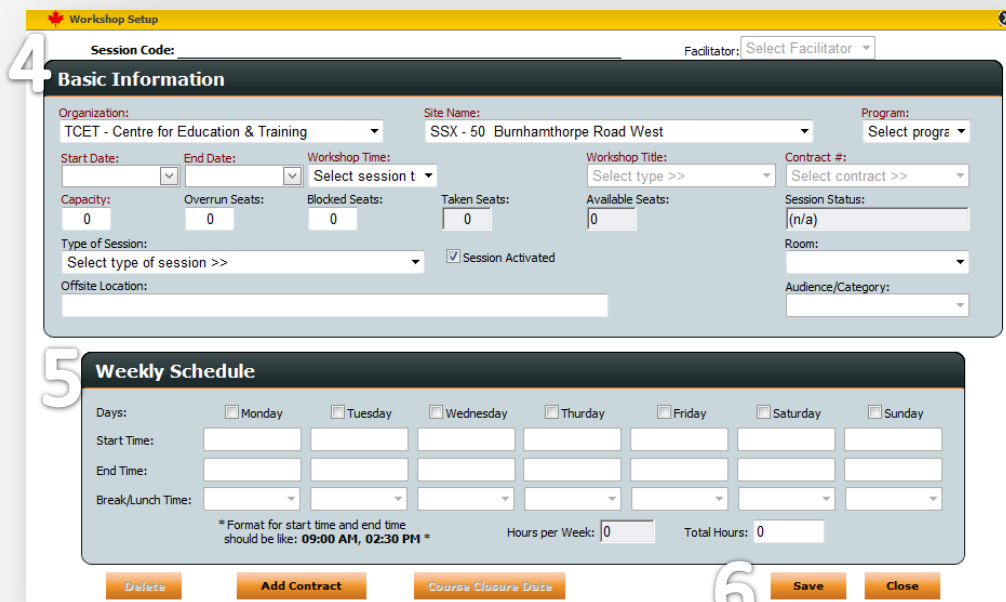
6. Save

Tip: Use the [Copy to](#) action to easily duplicate a workshop/session.

Tip: If a workshop/session is tentative, clear the box for Session Activated until confirmed.


Tip: If a drop-down menu variable is missing, a request must be submitted to the CETRA team to add.

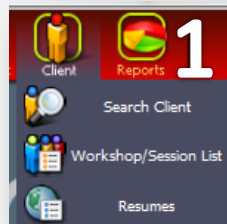
ES: If you are unclear about the type of session/audience, consult with your coordinator.





## Workshop/Session: Referral

- To refer a client to a workshop/session, go to **Search Client** from the **Client** menu or Shortcut menu
- Search-find the client
- From the search results, click the  (Refer to) icon  
This section can also be accessed via **Service Summary**
- From the **Client Referral** page, use the search criteria to find the workshop/session
- Select the workshop/session by clicking the check-box
- Click **Refer the client to the selected course**
- Confirm the information and click **Apply**



**Client Information Search**

First Name: RAB Date of Birth: [dropdown] Phone #: [ ]-[ ]-[ ]  
 Last Name: HAM Reference #: [ ] Card #: [ ]  
Card Number should be 7 digits

**Banned Client**

| Reference #  | First Name | Last Name | Date of Birth | Gender | Phone         | Document # | Refer To |
|--------------|------------|-----------|---------------|--------|---------------|------------|----------|
| RABHAM413558 | RAB        | HAM       | 01-Jan-1970   | F      | (111)111-1111 | 1121111    |          |

A large number '2' is overlaid on the search fields, and a large number '3' is overlaid on the 'Refer To' column.

**Client Referral**

**Client General Information**

Reference #: RABHAM413558 Child(ren) #: 2  
 First Name: RAB  
 Last Name: HAM  
 Address: no address  
 City: Mississauga Postal Code: L5B 3C2  
 Doc.Type: Card Number

**Client Session Information**

| Date        | Program | Status   | Course  |
|-------------|---------|----------|---|
| 27-Apr-2012 | ES      | Referral | EO-TCETSSX12001(L Create your Professional Brand) |
| 09-Feb-2012 | LD      | Referral | LD-TCETBCS11002(L test 1)                         |

**Select Course Search Criteria**

City: All Cities  
 Organization: TCET - Centre for Education & Training  
 Site: SSX - 50 Burnhamthorpe Road West  
 Program: ES

**Advance Search Options**

☐ Childminding Available ☒ Only Include Course Time: Any Time  
☐ Transportation Assistance Available ☒ Must Include Course Day: Any Day  
☒ Seats Available ☐ Include Time Conflicting Courses

**Available Course(s) for the Client**

| Program                                | Service Provider Site      | Session Type                 | Start Date  | End Date    | Weekly Schedule                        | Seats | CM                       |
|--|----------------------------|------------------------------|-------------|-------------|--|-------|--------------------------|
| <input checked="" type="checkbox"/> ES | 50 Burnhamthorpe Road West | Asbestos Removal Training    | Jan/18/2012 | Jan/31/2013 | Sa: 10:00AM-10:01AM                    | 1     | <input type="checkbox"/> |
| <input type="checkbox"/> ES            | 50 Burnhamthorpe Road West | Electronic Job Search        | Mar/01/2012 | Mar/29/2012 | We: 9:09AM-10:10AM Th: 9:09AM-12:10PM  | 28    | <input type="checkbox"/> |
| <input type="checkbox"/> ES            | 50 Burnhamthorpe Road West | Access the Hidden Job Market | Mar/30/2012 | May/31/2012 | Tu: 8:00AM-11:00AM Fr: 10:00AM-12:00PM | 48    | <input type="checkbox"/> |

**Legend:** \* Course in Blue: Seats available and no time conflict \* Black: Seats not available \* Red: Time conflicting

Selected Course: EO-TCETSSX11023

**Refer the client to the selected course**

A large number '4' is overlaid on the search criteria, a large number '5' is overlaid on the course list, and a large number '6' is overlaid on the 'Refer the client to the selected course' button.

**REFER TO CLASS**

Organization: Centre for Education & Training Program: ES  
 Site: 50 Burnhamthorpe Road West Class Time: Morning  
 Session Code: EO-TCETSSX11023(L Asbestos Removal Training) Weekly Schedule: Sat: 10:00AM-10:01AM

**< Previous** **Apply**

A large number '7' is overlaid on the 'Apply' button.



## Workshop/Session: Referral (cont'd)

### Troubleshooting:

- If you are unable to find a workshop in the search results, the client maybe registered for a session during that time period.
- Click the checkbox for **Include Time Conflicting Courses** under **Advance Search Options**
- This will cause all conflicting sessions to appear in **red**
- Sessions where seats have filled up will appear in **black**

### Client Referral

| Client General Information |                              | Client Session Information |   |
|----------------------------|------------------------------|----------------------------|---|
| Reference #:               | <a href="#">RABHAM413558</a> | Child(ren) #:              | 2   |
| First Name:                | RAB                          | Date:                      | 27-Apr-2012                                       |
| Last Name:                 | HAM                          | Program:                   | ES  |
| Address:                   | no address                   | Status:                    | Referral  |
| City:                      | Mississauga                  | Course:                    | EO-TCETSSX12001(L Create your Professional Brand) |
| Postal Code:               | L5B 3C2                      | Date:                      | 27-Apr-2012                                       |
| Doc.Type:                  | Card Number                  | Program:                   | ES  |
|                            |                              | Status:                    | Referral  |
|                            |                              | Course:                    | EO-TCETSSX11023(L Asbestos Removal Training)      |
|                            |                              | Date:                      | 09-Feb-2012                                       |
|                            |                              | Program:                   | LD  |
|                            |                              | Status:                    | Referral  |
|                            |                              | Course:                    | LD-TCETBCS11002(L test 1)                         |

### Select Course Search Criteria

|               |  |
|---------------|--|
| City          | All Cities                             |
| Organization: | TCET - Centre for Education & Training |
| Site:         | SSX - 50 Burnhamthorpe Road West       |
| Program:      | ES                                     |

### Advance Search Options

|  |  |
|--|--|
| <input type="checkbox"/> Childminding Available    | <input checked="" type="checkbox"/> Only Include Course Time: Any Time |
| <input type="checkbox"/> Transportation Assistance | <input checked="" type="checkbox"/> Must Include Course Day: Any Day   |
| <input type="checkbox"/> Seats Available           | <input checked="" type="checkbox"/> Include Time Conflicting Courses   |

### Available Course(s) for the Client

|                          | Program | Service Provider Site      | Session Type                   | Start Date  | End Date    | Weekly Schedule                                | Seats | CM                       |
|--------------------------|---------|----------------------------|--------------------------------|-------------|-------------|--|-------|--------------------------|
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West |                                | Jan/13/2012 | Feb/29/2012 | Fr: 4:00PM-4:05PM                              | 0     | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Asbestos Removal Training      | Jan/18/2012 | Jan/31/2013 | Sa: 10:00AM-10:01AM                            | 0     | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Job Search Strategies          | Feb/15/2012 | Jun/29/2012 | Mo: 11:09AM-9:10PM                             | 4     | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Access the Hidden Job Market   | Feb/08/2012 | May/18/2012 | Mo: 9:09PM-10:10PM                             | 12    | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Electronic Job Search          | Mar/01/2012 | Mar/29/2012 | We: 9:09AM-10:10AM Th: 9:09AM-12:10PM          | 28    | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Access the Hidden Job Market   | Mar/20/2012 | May/20/2012 | Mo: 9:09AM-11:11AM Tu,We,Th,Fr: 8:08AM-11:12AM | 59    | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Access the Hidden Job Market   | Mar/30/2012 | May/31/2012 | Tu: 8:00AM-11:00AM Fr: 10:00AM-12:00PM         | 48    | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Create your Professional Brand | Apr/28/2012 | May/31/2012 | Mo: 9:09AM-11:10PM                             | 49    | <input type="checkbox"/> |
| <input type="checkbox"/> | ES      | 50 Burnhamthorpe Road West | Access the Hidden Job Market   | Apr/30/2012 | Apr/30/2012 | Mo: 9:00AM-10:00AM                             | 15    | <input type="checkbox"/> |


**Legend:** \* Course in Blue: Seats available and no time conflict \* Black: Seats not available \* Red: Time conflicting

Selected Course: (None)

Refer the client to the selected course

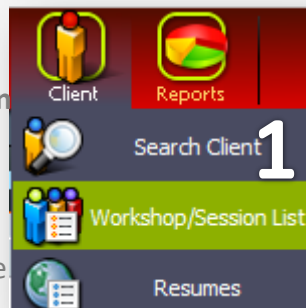
## Workshop/Session: Attendance

### Session Facilitator

1. From the **Client** Menu, click **Workshop/Session List**
2. Use the search criteria to view the list of registered clients
3. Click the check-box next to all clients who have attended
4. Click the  icon then **Attending**

(Repeat steps for clients not attending, click **Not-Attending** instead of Attending)

Note: To print a sign-in sheet, click the Print button after step 2.



City

All

Organization

TCET - Centre for Education & Training

Organization Site

SSX - 50 Burnhamthorpe Road West

Program

ES

Course Code

11028 - Access the Hidden Job Market (Mar 30,

Course Summary

Session Date:

30-Mar-2012 --- 31-May-2012

Contracted Seats:

50

Session Code:

E0-TCETSSX11028

Overrun Seats:

0

Class Time:

Morning

Registered Clients:

2

Class days:

Tue,Fri

Available Seats:

48

Blocked Seats:

0

Input Evaluation

Print

Legend:

Client Information

Action

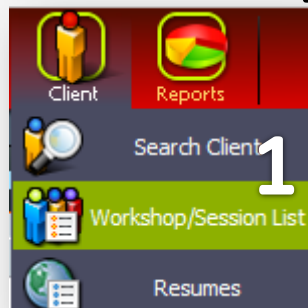
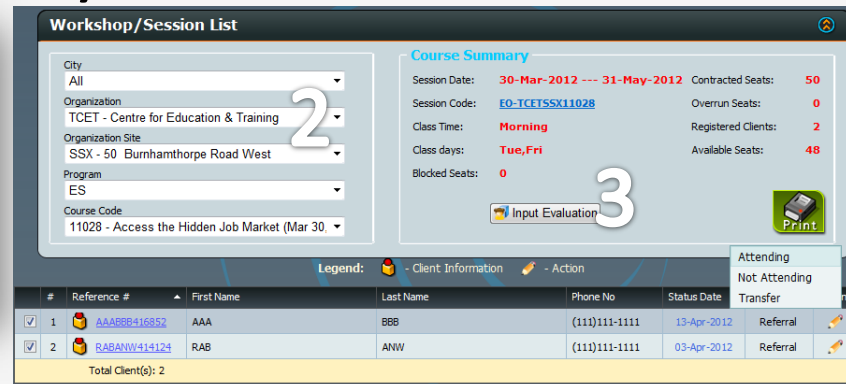
Total Client(s): 2





## Workshop: Evaluation (ES)

1. From the **Client** menu, select **Workshop/Session List**
2. Use the search criteria to view the list of registered clients
3. Click the **Input Evaluation** button
4. Input evaluation results by response. For each response, click the **Add >** button
5. Close

**Workshop/Session List**

City: All  
 Organization: TCET - Centre for Education & Training  
 Organization Site: SSX - 50 Burnhamthorpe Road West  
 Program: ES  
 Course Code: 11028 - Access the Hidden Job Market (Mar 30)

**Course Summary**

Session Date: 30-Mar-2012 --- 31-May-2012 Contracted Seats: 50  
 Session Code: EO-TCETSSX11028 Overrun Seats: 0  
 Class Time: Morning Registered Clients: 2  
 Class days: Tue, Fri Available Seats: 48  
 Blocked Seats: 0

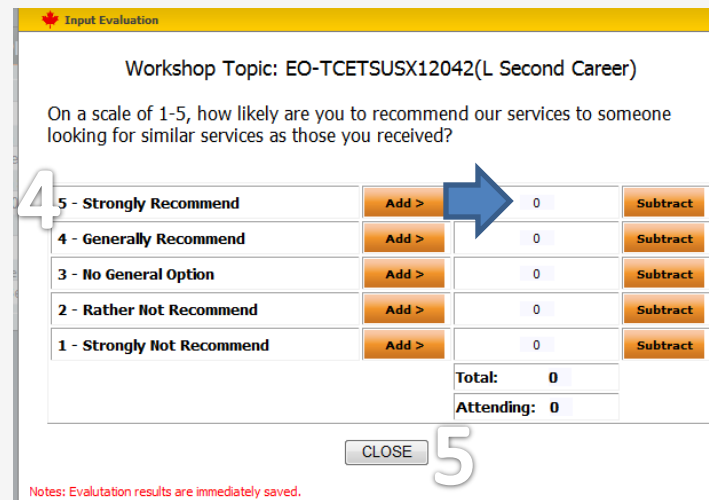
**Legend:** Client Information Action

| # | Reference #  | First Name | Last Name | Phone No      | Status Date | Referral |
|---|--------------|------------|-----------|---------------|-------------|----------|
| 1 | AAABBB416852 | AAA        | BBB       | (111)111-1111 | 13-Apr-2012 | Referral |
| 2 | RABANW414124 | RAB        | ANW       | (111)111-1111 | 03-Apr-2012 | Referral |

Total Client(s): 2

Note: Results cannot exceed the # of clients in "Attending" status

Note: Results are saved instantly



**Input Evaluation**

Workshop Topic: EO-TCETSUSX12042(L Second Career)

On a scale of 1-5, how likely are you to recommend our services to someone looking for similar services as those you received?

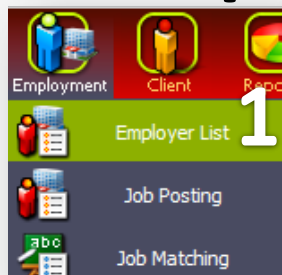
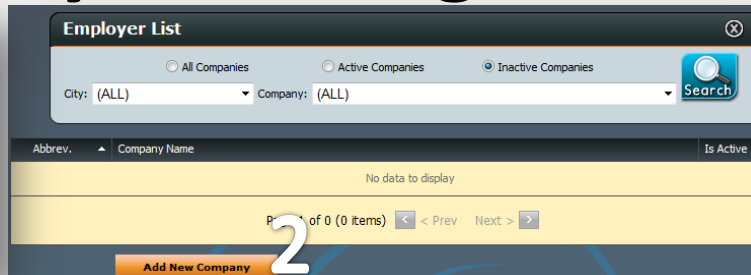
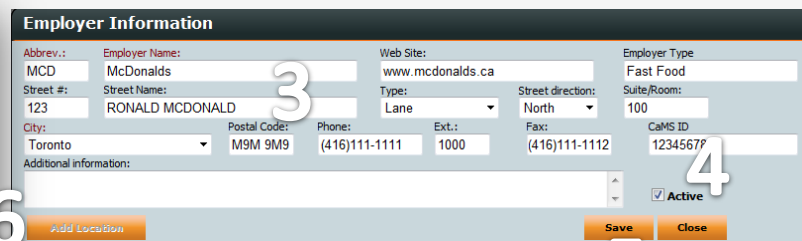
|                            |       |   |          |
|----------------------------|-------|---|----------|
| 5 - Strongly Recommend     | Add > | 0 | Subtract |
| 4 - Generally Recommend    | Add > | 0 | Subtract |
| 3 - No General Option      | Add > | 0 | Subtract |
| 2 - Rather Not Recommend   | Add > | 0 | Subtract |
| 1 - Strongly Not Recommend | Add > | 0 | Subtract |
| <b>Total:</b>              |       | 0 |          |
| <b>Attending:</b>          |       | 0 |          |

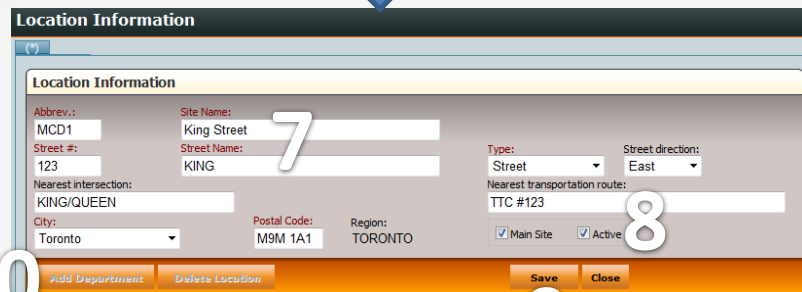
**CLOSE**

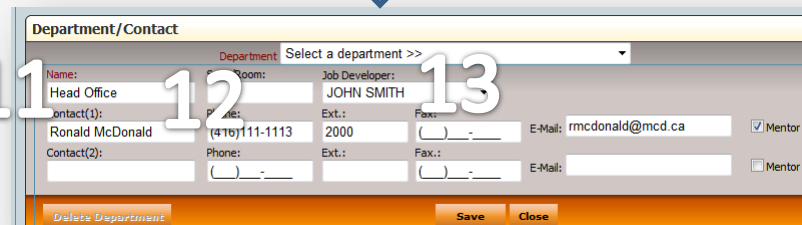
Notes: Evaluation results are immediately saved.



## Employer Management: Setup (ES)



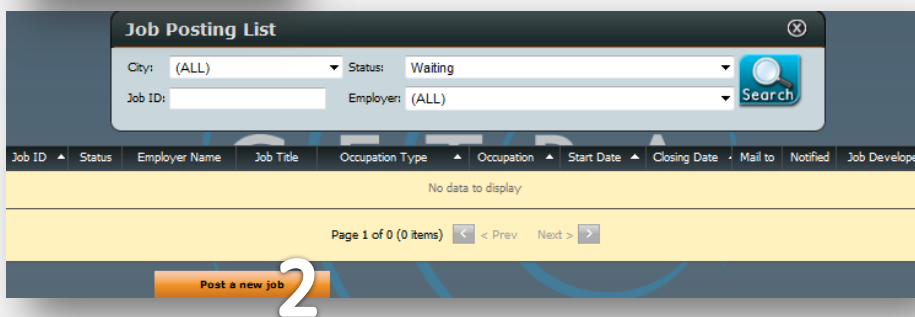
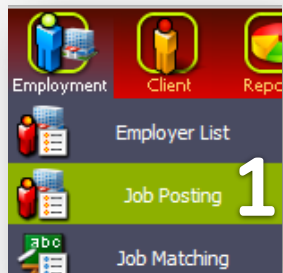
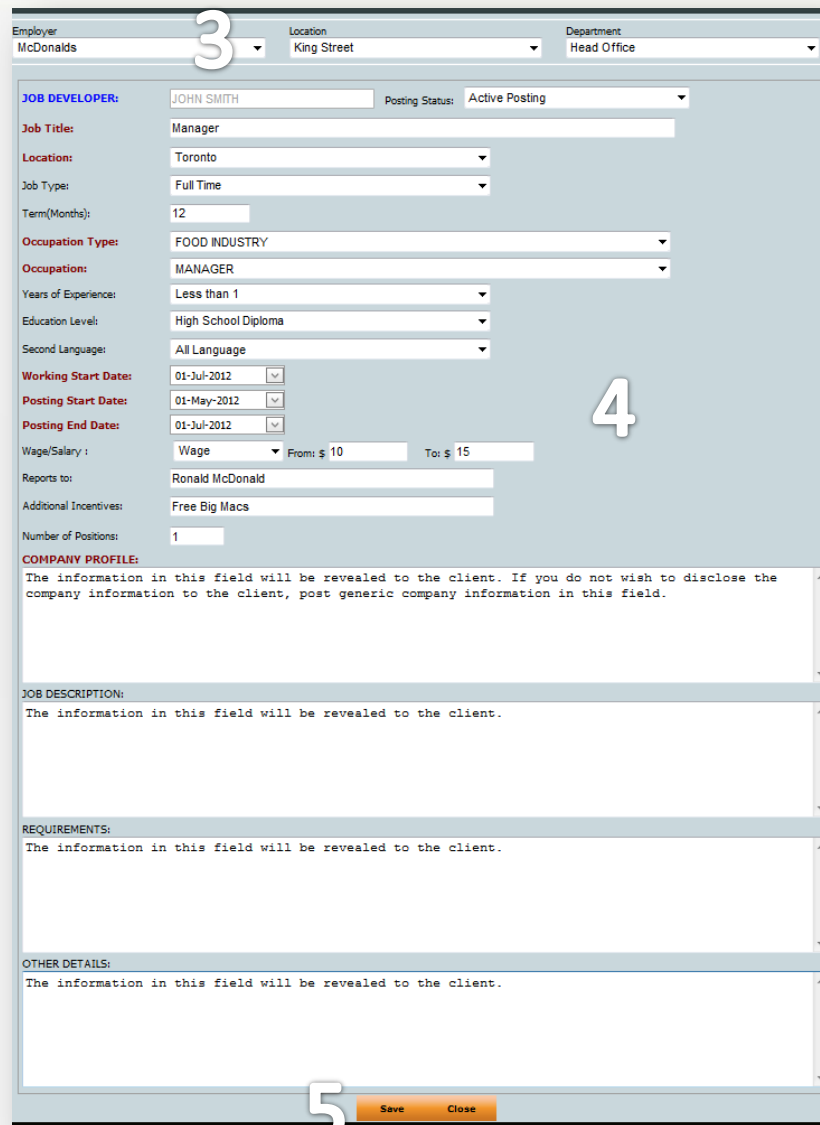


### Job Developer

- From the **Employment** menu, select **Employer List**
- To add new employer, click **Add New Company**
- Input employer data
- Activate by selecting the Active check-box
- Save
- Click **Add Location**
- Input location/site data
- Activate by selecting the Active check-box
- Save
- Click **Add Department**
- In **Name** field, input department name
- Input contact data
- Select **Job Developer** name
- Save

Note: Employer must be set up *before* posting a job

## Job Posting: Setup (ES)

### Job Developer



1. From the **Employment** menu, select **Job Posting**
2. To post a new job, click **Post a new job**
3. Select employer/location/department from drop-down menus
4. Input job posting information
5. Save

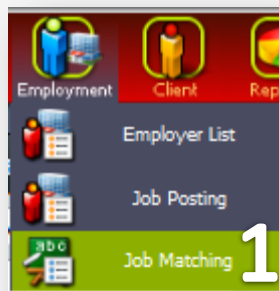
Note: To make a job posting inactive, use the Posting Status drop-down menu.



## Job Matching: Search (ES)

### Job Developer OR Career Specialist

1. From the **Employment** menu, select **Job Matching**
2. Find the job you want to match clients for (use search to filter)
3. Click the  (Match) button for that job
4. Amend the search criteria based on your preference
5. Click Search
6. From the search results, click the  (apply) icon to view/select client resumes



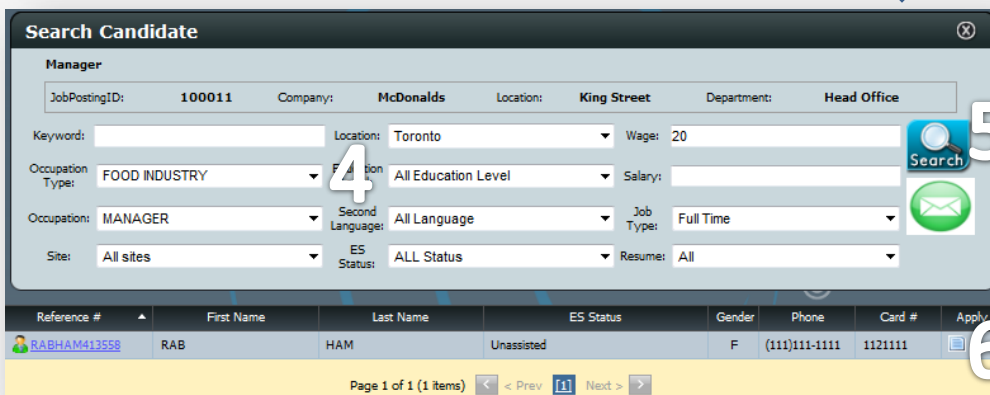

**Job Matching**

City: (ALL) Columns: (ALL) Search

Job ID: Status: ☐ All ☒ Active ☐ Inactive

| Job ID | Occupation Type | Occupation             | Employer Name                                 | Job Title                                  | Start Date  | Closing Date | Match | Submitted |
|--------|-----------------|------------------------|---|--|-------------|--------------|-------|-----------|
| 100006 | ACCOUNTING      | ACCOUNTING CLERK       | <a href="#">I.T. Accounting Services Inc.</a> | <a href="#">Accounting Clerk</a>           | Nov/01/2011 | Dec/06/2012  |       | 6         |
| 100007 | RETAIL          | CASHIER                | <a href="#">Globe Wholesale Meats, Inc.</a>   | <a href="#">Cashier</a>                    | Nov/15/2011 | Dec/28/2012  |       | 0         |
| 100010 | ADMINISTR...    | BUSINESS ADMINISTRATOR | <a href="#">Debt Freedom Canada</a>           | <a href="#">Debt Freedom Administrator</a> | May/31/2012 | May/31/2012  |       | 0         |
| 100003 | MECHANICS       | AIR COND. MECHANIC     | <a href="#">Critical Air Mechanical Inc.</a>  | <a href="#">HVAC Apprentice</a>            | Nov/26/2011 | Nov/30/2012  |       | 0         |
| 100011 | FOOD INDUSTRY   | MANAGER                | <a href="#">McDonalds</a>                     | <a href="#">Manager</a>                    | May/01/2012 | Jun/01/2012  |       | 0         |

Page 1 of 1 (5 items) < Prev 11 Next >



**Search Candidate**

**Manager**

JobPostingID: 100011 Company: McDonalds Location: King Street Department: Head Office

Keyword: Location: Toronto Wage: 20

Occupation Type: FOOD INDUSTRY All Education Level Salary:

Occupation: MANAGER Second Language: All Language Job Type: Full Time

Site: All sites ES Status: ALL Status Resume: All

Search

| Reference #  | First Name | Last Name | ES Status  | Gender | Phone         | Card #  | Apply |
|--------------|------------|-----------|------------|--------|---------------|---------|-------|
| RABHAM413558 | RAB        | HAM       | Unassisted | F      | (111)111-1111 | 1121111 |       |


Page 1 of 1 (1 items) < Prev 11 Next >

(Cont'd on next)





## Job Matching: Search (Cont'd)


(cont'd from previous)

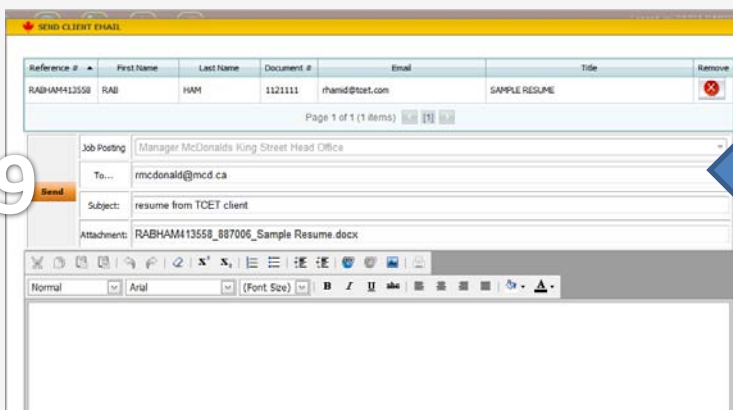
- To select a resume to send to the employer, click the  (add to list) icon.

Repeat for multiple clients as needed

- To send resumes to employer, click the  (send) icon.

- Type email body as needed and click  Send

To remove client resume from attachment list, use the  (remove) icon






### Client Resume List

**Client General Information**

|              |                              |             |                    |              |                |
|--------------|------------------------------|-------------|--------------------|--------------|----------------|
| Reference #: | <a href="#">RABHAM413558</a> | First Name: | <b>RAB</b>         | Last Name:   | <b>HAM</b>     |
| Address:     | no address                   | City:       | <b>Mississauga</b> | Postal Code: | <b>L5B 3C2</b> |

**Client Resume Information**

| ID | upload date | Title         | Keywords | Resume  | Email   | Add to list   |
|----|-------------|---------------|----------|---|---|---|
| 85 | 20-Mar-2012 | SAMPLE RESUME |          |  |  |  |

**Job Posting Submitted List**

| ResumeID | Employer   | Job Title  | Submitted Date | Sender |
|----------|--|--|----------------|--------|
| 85       | I.T. Accounting Services Inc. - Skymark - Accounting | ACCOUNTING - ACCOUNTING CLERK - Accounting Clerk | 23-Apr-2012    | GRACE  |

### Search Candidate

**Manager**



JobPostingID: **100011** Company: **McDonalds** Location: **King Street** Department: **Head Office**


Keyword:  Location: **Toronto** Wage:



Occupation Type: **FOOD INDUSTRY** Education Level: **All Education Level** Salary:

Occupation: **MANAGER** Second Language: **All Language** Job Type: **Full Time**

Site: **All sites** ES Status: **ALL Status** Resume: **All**

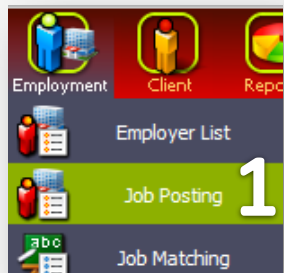
| Reference #                  | First Name | Last Name | ES Status  | Gender | Phone         | Card #  | Apply   |
|------------------------------|------------|-----------|------------|--------|---------------|---------|---|
| <a href="#">RABHAM413558</a> | RAB        | HAM       | Unassisted | F      | (111)111-1111 | 1121111 |  |

Page 1 of 1 (1 items)  


Note: Email history can be viewed via **Submitted** column in **Job Posting** or **ES History (Client File)**

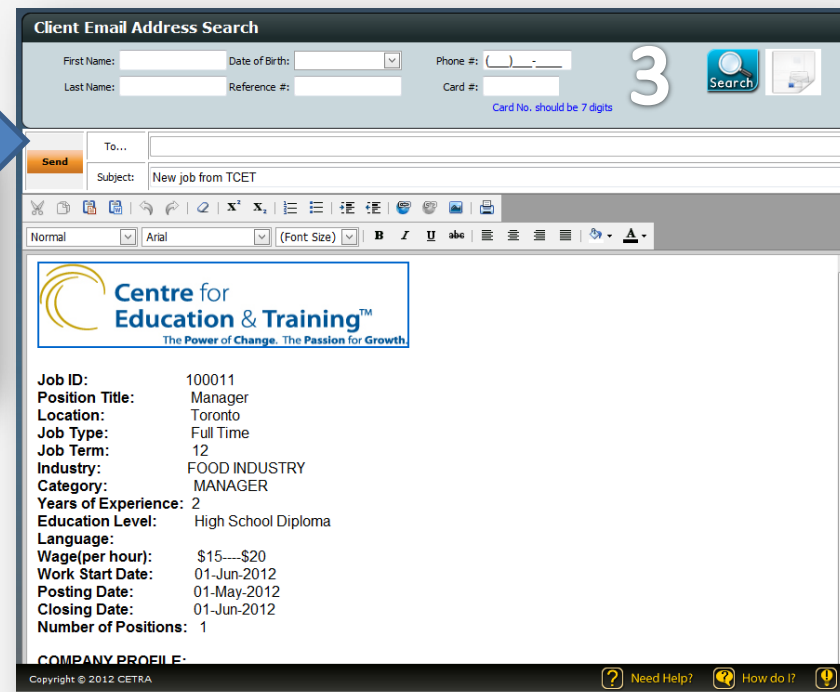


## Job Posting: Send to client (ES)



### Career Specialist or Job Developer

1. From the **Employment** menu, select **Job Posting**
2. Click the  (email) icon for the selected job
3. Use the search to find the client
4. Edit the email body as needed
5. Send
6. Search next client as needed – or – close



**Client Email Address Search**

First Name:  Date of Birth:  Phone #:   
 Last Name:  Reference #:  Card #:  **3**

Card No. should be 7 digits

**Send** To:

Subject: New job from TCET

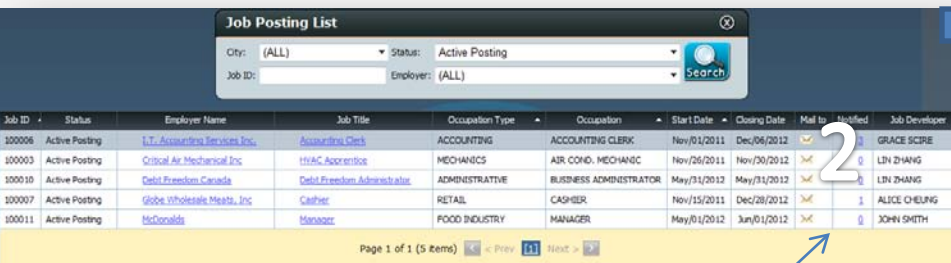
Normal Arial (Font Size) B I U abc






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**Job ID:** 100011  
**Position Title:** Manager  
**Location:** Toronto  
**Job Type:** Full Time  
**Job Term:** 12  
**Industry:** FOOD INDUSTRY  
**Category:** MANAGER  
**Years of Experience:** 2  
**Education Level:** High School Diploma  
**Language:**  
**Wage(per hour):** \$15-20  
**Work Start Date:** 01-Jun-2012  
**Posting Date:** 01-May-2012  
**Closing Date:** 01-Jun-2012  
**Number of Positions:** 1

**COMPANY PROFILE-**

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| Job ID | Status         | Employer Name                 | Job Title                      | Occupation Type | Occupation             | Start Date  | Closing Date | Mail To   | Job Developer |
|--------|----------------|-------------------------------|--------------------------------|-----------------|------------------------|-------------|--------------|---|---------------|
| 100006 | Active Posting | U.T. Accounting Services Inc. | Accounting Clerk               | ACCOUNTING      | ACCOUNTING CLERK       | Nov/01/2011 | Dec/06/2012  |  | GRACE SCIRE   |
| 100003 | Active Posting | Critical Air Mechanical Inc.  | HVAC Apprentice                | MECHANICS       | AIR COND. MECHANIC     | Nov/26/2011 | Nov/30/2012  |  | LIN ZHANG     |
| 100010 | Active Posting | Deloitte Freedom Canada       | Deloitte Freedom Administrator | ADMINISTRATIVE  | BUSINESS ADMINISTRATOR | May/31/2012 | May/31/2012  |  | LIN ZHANG     |
| 100007 | Active Posting | Globe Wholesale Meats, Inc.   | Cashier                        | RETAIL          | CASHER                 | Nov/15/2011 | Dec/28/2012  |  | ALICE CHEUNG  |
| 100011 | Active Posting | McDonalds                     | Manager                        | FOOD INDUSTRY   | MANAGER                | May/01/2012 | Jun/01/2012  |  | JOHN SMITH    |

Page 1 of 1 (5 items) [Prev](#) [Next](#)

Note: Email history can be viewed via **Notified** column or **ES History (Client File)**