

# Users' Guide

## For

# Course Administration System (CAS)

## Software Application

Version: 2.3  
Date: 10/14/2021



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## Introduction

The purpose of this document is to describe the list all functionality available in the Course Administration System (CAS) web-based solution.

The web-based Course Administration System was custom designed and built by Penn State Facilities Engineering Institute manage client's training needs. It was designed to be intuitive and easy to navigate for the users. The execution of each function is similar so to minimize the learning curve.

The solution is supported and maintained by PSFEI.

It resides on Penn State servers.

## 1. Functional Summary

### 1.1 User Roles

This section summarizes each defined role and the associated capabilities.

#### 1.1.1 Students

Student role will be able to:

- view their courses (previous and upcoming)
- view upcoming available courses for their region
- contact instructors
- download course material
- complete surveys
- generate course Certificate

#### 1.1.2 GSA Headquarter Personnel

GSA Headquarter Personnel role will be able to

- view courses
- view surveys

#### 1.1.3 GSA Regional Administrators

GSA Regional Administrators role will be able to

- view courses for their region (previous and upcoming)
- add students/users
- view reports only for their region

#### **1.1.4 PSFEI Administrators**

PSFEI Administrators role will have full access to

- add/modify/delete and view all users, contacts, instructors
- add/modify/delete and view all courses
- add/modify/delete and view all course material
- add/modify/delete and view all surveys
- add/modify/delete and view all addresses
- add/modify/delete and view all regions
- print course participants tents(name tags)

#### **1.1.5 CBSD Administrators**

CBSD Administrators role will have full access to

- add/modify/delete and view all users, contacts, instructors
- add/modify/delete and view all courses

#### **1.1.6 Training Request**

This role will allow users to request training.

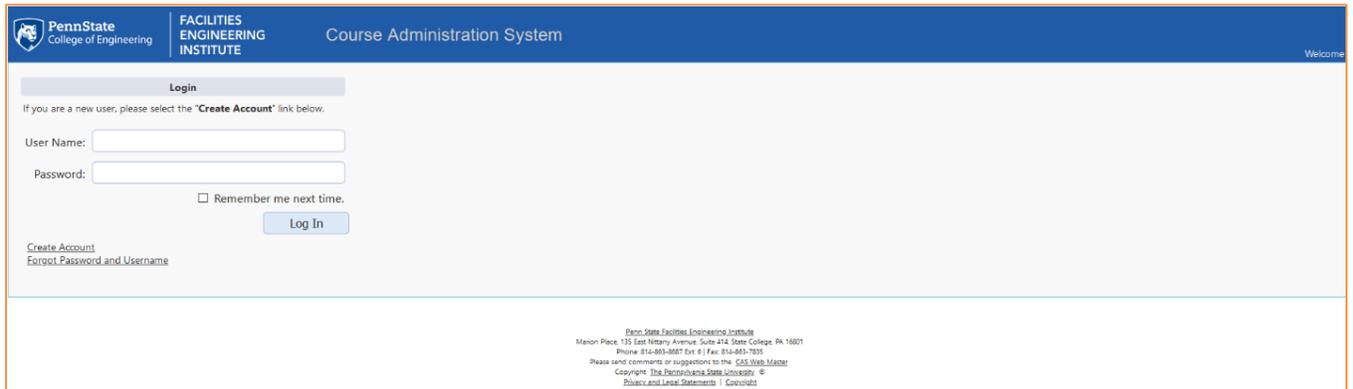
#### **1.1.7 User Profile**

This role allows PSFEI users to manage their certifications, credentials, and Safety training.

## 1.2 Login

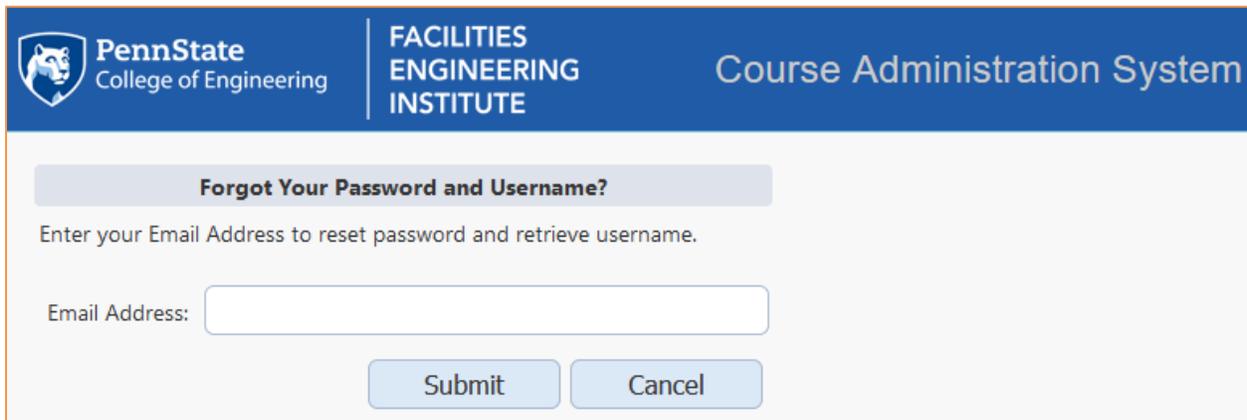
Each user must be added into the system prior to a login attempt.

The CAS system authenticates the user based on the login information that is typed into the login form.



The screenshot shows the login interface for the Penn State Course Administration System. At the top, there is a blue header with the Penn State College of Engineering logo on the left, the text 'FACILITIES ENGINEERING INSTITUTE' in the center, and 'Course Administration System' on the right. A 'Welcome' message is visible in the top right corner. Below the header is a 'Login' section with a light blue background. It contains the text 'If you are a new user, please select the "Create Account" link below.' followed by two input fields: 'User Name:' and 'Password:'. Below the password field is a checkbox labeled 'Remember me next time.' and a 'Log In' button. At the bottom of the login section are two links: 'Create Account' and 'Forgot Password and Username'. At the very bottom of the page, there is a small footer with contact information for Penn State Facilities Engineering Institute, including the address, phone, fax, and copyright notice.

If a user forgets their Password and/or Username, they can request it to be emailed to them by clicking on the **“Forgot Password and Username”** link below the login area. They will see the following screen asking them for Email Address. The email address must already exist in the system. A new password and username will be sent to the email address in the system.



The screenshot shows the 'Forgot Your Password and Username?' page. It features a blue header with the Penn State College of Engineering logo on the left, the text 'FACILITIES ENGINEERING INSTITUTE' in the center, and 'Course Administration System' on the right. Below the header is a light blue box with a title bar that says 'Forgot Your Password and Username?'. Inside the box, the text reads 'Enter your Email Address to reset password and retrieve username.' followed by an 'Email Address:' label and a text input field. At the bottom of the box are two buttons: 'Submit' and 'Cancel'.

The easiest way to enter the new password is to Copy it from the email and paste it into the Password area of the login page.

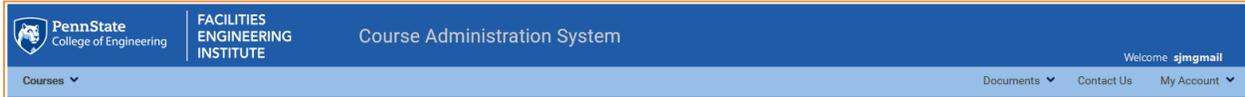
After the user is authenticated, the username is displayed in the upper right-hand corner of the screen.



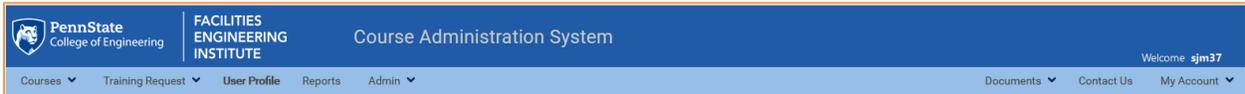
## 1.3 Navigation

The CAS web site contains links to access various functionality of CAS. The available links and functionality that a user sees will depend on the Role that was assigned to the user in the system.

The following is an example of functionality available to a student.

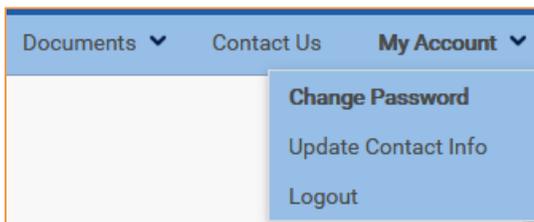


The following is an example of functionality available to a PSFEI CAS administrator.



### 1.3.1 My Account

The My Account link contains login and account-related such as: Change Password, Update Contact Info, and Logout.



#### ***Change Password***

This option allows a user to change their password. It is a good practice to periodically change your password for security purposes, especially when you think your password may be compromised.

The screenshot shows a form titled 'Change Your Password'. It includes a text box for the current password, a text box for the new password, and a text box for the confirm new password. Below the text boxes are two buttons: 'Change Password' and 'Cancel'. A note above the text boxes states: 'Passwords must be at least 7 characters long and contain at least one non-alphanumeric character (Examples: \$ ^ @ \* \_)'.

### ***Update Contact Info***

This option allows a user to modify their own user information. This function is for the user that is currently logged in.

**Update Contact Information**

User Name:

Email:  \*

First Name:  \*

Middle Name:

Last Name:  \*

Region:

Note: Contact [CASSupport@enr.psu.edu](mailto:CASSupport@enr.psu.edu) to change your assigned region

Office Symbol:

Title:

Address Line 1:

Address Line 2:

City:

State:

Zip:

Office Phone:

Mobile Phone:

Fax:

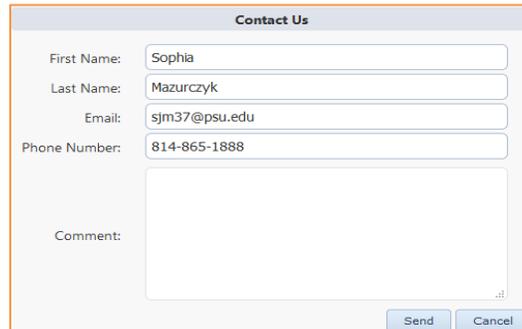
\* Indicates fields that are required

### ***Logout***

This option allows a user to log off the system. The user will be presented with the login screen upon successful log off.

### 1.3.2 Contact Us

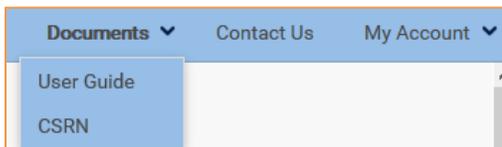
This link provides an easy way to send a message to CAS support team. A web form is prepopulated with user's information such as name, email address, and telephone number. A user simply needs to write the message and click the Send button.



The image shows a 'Contact Us' web form. It has a title bar that says 'Contact Us'. Below the title bar are four input fields: 'First Name' with the value 'Sophia', 'Last Name' with 'Mazurczyk', 'Email' with 'sjm37@psu.edu', and 'Phone Number' with '814-865-1888'. Below these fields is a large text area for a 'Comment'. At the bottom right of the form are two buttons: 'Send' and 'Cancel'.

### 1.3.3 Documents

The **Documents** link contains User Guide and the CSRN (Client Software Release Notice).



#### ***User Guide***

This link provides users with access to an online documentation such as the CAS User Guide. It is a pdf file that opens in a separate web browser window. It describes the operations and functionality of the CAS application.

#### ***CSRN***

This tab provides users with access to an online documentation such as the CAS Customer Software Release Notice. It is a pdf file that opens in a separate web browser window. This document lists all enhancements, changes, and fixes to the application that are found with each release of the CAS application.

## 1.4 CAS Main Categories of Functionality

The main categories of functionality for CAS include the following:

- Users (Administrators, Students, Instructors)
- Courses
- Building & Regions
- Surveys
- Certificates
- Tents
- Attendance

### 1.4.1 Users

Please refer to Section 1.1 User Roles for definition of user roles and the functionality available to each user role.

### 1.4.2 Courses

Courses must first be added to the system by a CAS administrator.

Once in the system, they may be viewed and edited utilizing gridview controls depending on User Roles.

Courses may be viewed by all user roles.

Only administrators may create, modify, and delete courses.

The system supports a variable length number of days per each course. For example, a course can run anywhere from one day to five days.

Each course is mapped to one region.

### 1.4.3 Buildings and Regions

Regions must first be added to the system by a CAS administrator.

Each user may be mapped to one or more regions.

### 1.4.4 Surveys

Users attending a course can provide their feedback via entering their rating and responses via a survey form. The survey will collect information about the course material, instructors, etc.

Please note student's attendance must be recorded in CAS **before** a student can complete the survey or completion certificate.

### 1.4.5 Certificates

The system can generate Course Certificates.

A certificate of completion may be obtained by the students only if the student attended every day of the course, the course is complete, and the survey is complete.

### 1.4.6 Student Tents

The system contains class participants for each course.

PSFEI administrators can print the tents, also known as the name tags, before the start of an upcoming, in person class. This functionality enables class participants to know the names of each other.

### 1.4.7 Attendance

The system allows instructors or educational administrators to manage students' attendance for each day of the course. If students are signed up but do not attend each day the course is taught, they will not be able to receive/print their certificate.

## 2. CAS Features

### 2.1 Main Page

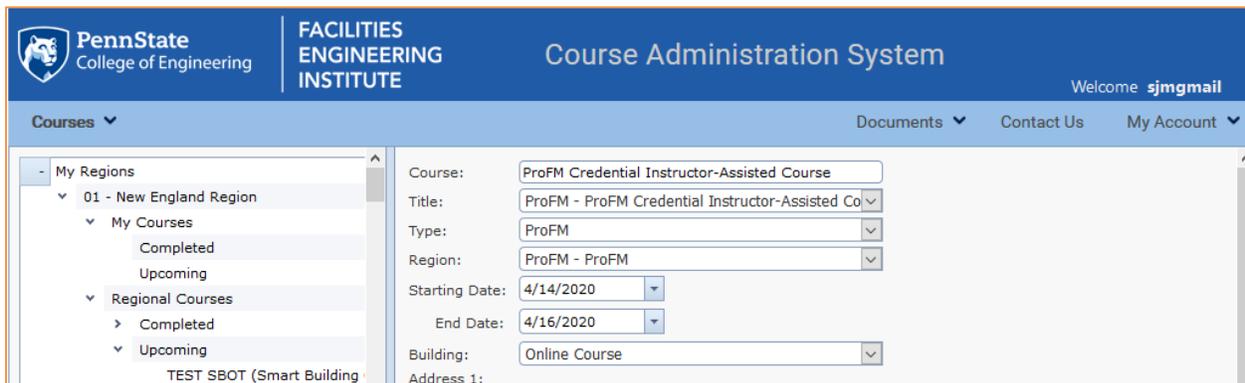
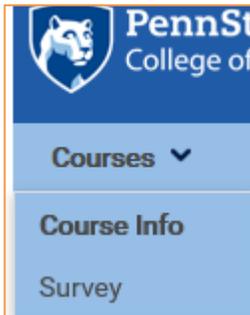
After a user successfully logs in, they will be presented with the functionality associated with their user role. For example, a user with a Student role would have the Courses link available to them with a list of completed and upcoming courses, the instructors, course material, and download their certificate of completion.

### 2.2 Courses

The Courses menu contains Course Info and Survey.

#### 2.2.1 Course Info

The system will automatically position the user into the **Course Info** functionality which is a selection under the Courses menu.

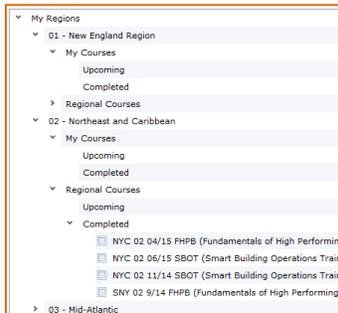


The main screen is divided into two sections:

1. My Regions - left side is dedicated to the regions listing upcoming and completed courses
2. Main content - right side contains the main content page listing the functionality that is available to the role of the logged in user.

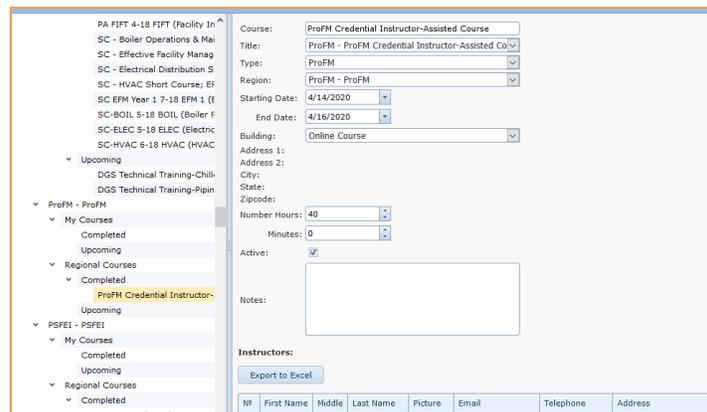
### ***My Regions – left side***

This section of the screen lists regions to which users may have visibility to. Clicking on the down arrows will expand that region and list its upcoming and completed courses. Clicking on it again will hide the details of the region. Clicking on the right arrow (>) will expand the courses' listing.



### ***Main Content – right side***

Clicking on one of the courses in the My Region area, will select it and the system will populate the course details in the main content area of the screen. In addition to the course details, the page will include the instructor(s), viewable course material, and a button to download certificate of completion.



## 2.2.2 Survey

Surveys are completed by students. The main purpose of a survey is to rate the course and the instructor(s). If a course has more than one instructor, each instructor may be rated separately. Students' attendance must be entered in CAS before they can complete the surveys. Students must complete a survey before they can download their Certificate of Completion.

Below is a sample screen capture of the Survey page. After completing the survey, clicking the Submit button will save the survey into the system.

The screenshot shows a survey interface. At the top, a light blue box contains the following details:

- Course: SJM Test Course
- Title: sjmTest - Sophia Test Course
- Region: 01 - New England Region
- Dates: 2/11/2016 to 2/12/2016
- Location:

Below this box, the text reads: "Please complete the survey questions and click on Submit." The main survey area contains a single question: "The course content was well organized and understandable." To the right of the question is a rating scale with five radio buttons. Above the buttons are labels: "Strongly Agree (5)", "Agree (4)", "Neutral (3)", "Disagree (2)", and "Strongly Disagree (1)".

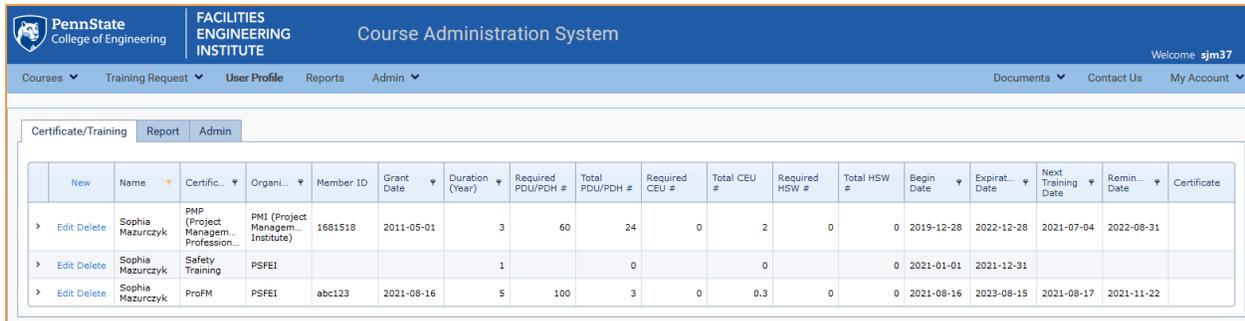
## 2.3 Training Request

This functionality will be utilized by internal staff to request training. This feature will be further expanded in subsequent releases.



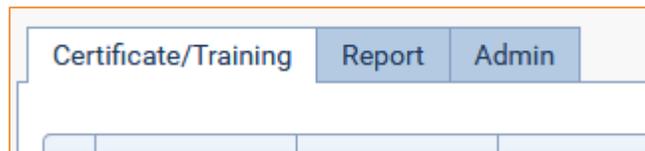
## 2.4 User Profile

The purpose of User Profile will be to track courses to maintain staff professional certifications, licenses, Professional Development and Safety Training. This functionality will be utilized by internal staff. Only users with User Profile role assigned in the system will have this functionality available to them. The following example illustrates staff managing their Safety Training, PMP, and ProFM certification/training.



	New	Name	Certific...	Organi...	Member ID	Grant Date	Duration (Year)	Required PDH/PDH #	Total PDH/PDH #	Required CEU #	Total CEU #	Required HSW #	Total HSW #	Begin Date	Expirat... Date	Next Training Date	Remin... Date	Certificate
>	Edit Delete	Sophia Mazurczyk	PMP (Project Managem... Profession...	PMI (Project Managem... Institute)	1681518	2011-05-01	3	60	24	0	2	0	0	2019-12-28	2022-12-28	2021-07-04	2022-08-31	
>	Edit Delete	Sophia Mazurczyk	Safety Training	PSFEI			1		0		0		0	2021-01-01	2021-12-31			
>	Edit Delete	Sophia Mazurczyk	ProFM	PSFEI	abc123	2021-08-16	5	100	3	0	0.3	0	0	2021-08-16	2023-08-15	2021-08-17	2021-11-22	

User Profile functionality consists of three functional components: Certificate/Training, Report, and Admin.



All PSFEI staff have access to the Certificate/Training and the Report feature. Only PSFEI administrators will have the Admin feature.

This function utilizes PSFEI organization reporting structure to further give access to team's manager and administrators. For example, if employee Jane Doe reports to John Smith, he will have access to view her Certifications and Safety training information and status.

PSFEI administrators have full access to User Profile functions for all staff.

Managers will have visibility to their staff training. Safety Managers will have visibility to everyone's training.

### 2.4.1 Certifications and Training Management

PSFEI staff can manage all their certification and training in one area within CAS. An example of a certification/training may be Safety, PE, CEM, ProFM, PMP, etc.

Certificate/Training		
Report		Admin
<b>New</b>	Name	Certificati...
> Edit Delete	Sophia Mazurczyk	Safety Training
> Edit Delete	Sophia Mazurczyk	PMP (Project Management Professional)

To create a new Certification summary record, please click on **New** in the column header.

To expand the summary record and view detail courses, please click on the **greater than symbol** > to the left of the row.

To edit the summary record, please click on the **Edit** link to the left of the row.

The Certification information includes the following summary items:

*Certification, Organization, Grant date, Required PDU/PDH/CEU/HSW, Total PDU/PDH/CEU/HSW, Begin date, Expiration date, Next Training Date, Reminder date, and uploaded certificate of the completion.*

New	Name	Certificati...	Organizati...	Member ID	Grant Date	Duration (Year)	Required PDU/PDH #	Total PDU/PDH #	Required CEU #	Total CEU #	Required HSW #	Total HSW #	Begin Date	Expiration Date
> Edit Delete	Sophia Mazurczyk	PMP (Project Management Professional)	PMI (Project Management Institute)	1681518	2011-05-01	3	60	24	0	2	0	0	2019-12-28	2022-12-28

New	Apply To	Training	Description	Location	Cost	Provider	Duration (Hour)	PDU/PDH #	CEU #	HSW #	Class Start
> Edit Delete	PMP (Project Management Professional)	Consulting As a Service for Digital Transformation Vision	Webinar	Online	0	ProjectManagement.org	1	1	0	0	2019-08-1
> Edit Delete	PMP (Project Management Professional)	Risk Management Framework	ISC	Online	128	NIST	3	3	0	0	2021-03-0
> Edit Delete	PMP (Project Management Professional)	Agile development	webinar	online	0	ProjectManagement.org	20	20	2	0	2021-08-1

The following is an entry form for a new Certification record.

Name:*	<input type="text"/>	Certification:*	<input type="text"/>
Organization:*	<input type="text"/>	Member ID:	<input type="text"/>
Grant Date:	<input type="text"/>	Duration (Year):*	<input type="text"/>
Required PDU/PDH #:	<input type="text"/>	Total PDU/PDH #:	<input type="text"/>
Required CEU #:	<input type="text"/>	Total CEU #:	<input type="text"/>
Required HSW #:	<input type="text"/>	Total HSW #:	<input type="text"/>
Begin Date:*	<input type="text"/>	Expiration Date:*	<input type="text"/>
Next Training Date:	<input type="text"/>	Reminder Date:*	<input type="text"/>
Certificate:	<input type="text"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

For the items with a dropdown at the end of the column, please click on the down arrow and make appropriate selection from a dropdown. When all edits are complete, please click on the **Update** link at the bottom right corner of the form to save it.

If you do not find either your **Certification** (name of certification, license, credential) or the **Organization** (name of the organization or institution who granted the credential) in the corresponding dropdowns' selections, please send an email to [CASSupport@engr.psu.edu](mailto:CASSupport@engr.psu.edu) with the missing Organization and/or the Certification selections and those will be promptly added.

Each Certification can have multiple Training Courses to meet the certification requirements. The Training Course entry form items includes the following information:

Training, Description of training, location, cost, provider, duration, PDU/PDH/CEU/HSW, training start and end dates and uploaded certificate of completion.

Certificate/Training																	
Report Admin																	
New	Name	Certific...	Organi...	Member ID	Grant Date	Duration (Year)	Required PDU/PDH #	Total PDU/PDH #	Required CEU #	Total CEU #	Required HSW #	Total HSW #	Begin Date	Expirat... Date	Next Training Date	Remin... Date	Certificate
▼ Edit Delete	Sophia Mazurczyk	PMP (Project Managem... Profession...	PMI (Project Managem... Institute)	1681518	2011-05-01	3	60	24	0	2	0	0	2019-12-28	2022-12-28	2021-07-04	2022-08-31	
New	Apply To	Training	Description	Location	Cost	Provider	Duration (Hour)	PDU/PDH #	CEU #	HSW #	Class Start Date	Class End Date	Certificate				
▼ Edit Delete	PMP (Project Management Professional)	Consulting As a Service for Digital Transformation Vision	Webinar	Online	0	ProjectManagement.org	1	1	0	0	2019-08-10	2019-08-10					
▼ Edit Delete	PMP (Project Management Professional)	Risk Management Framework	ISC	Online	128	NIST	3	3	0	0	2021-03-06	2021-03-06					
▼ Edit Delete	PMP (Project Management Professional)	Agile development	webinar	online	0	ProjectManagement.org	20	20	2	0	2021-08-14	2021-08-14					

The following is an entry form for a new Training Course record.

Apply To:  Select All  
 Safety Training  
 PMP (Project Management Professional)

Description:

Cost:

Duration (Hour):\*

CEU #:

Class Start Date:\*

Frequency:

Training:\*

Location:

Provider:

PDU/PDH #:

HSW #:

Class End Date:\*

Certificate:

## 2.4.2 Safety Training Management

This function will be utilized to manage our Safety Training requirement. Each PSFEI division has a unique list of Safety Training courses that is required for each team. User Profile tool will replace the previously safety training data that was maintained in an Excel worksheet. Each team's Safety Training Excel worksheet will be updated as per Safety Training matrix dated September 2022. Safety training record will be visible to staff's manager and the Safety Committee.

The Safety Training is based on a calendar year. Every year, the user will see the safety training list that is due that year. The safety training will automatically roll over based on the training interval for the specific safety course. The system will check every quarter if the required training has been taken that year. An email will be sent to remind a user that the training item is not complete.

All users should keep their Safety Training information up to date in CAS.

▼ Edit Delete Sophia Mazurczyk Safety Training PSFEI																
New	Apply To	Training	Description	Location	Cost	Provider	Duration (Hour)	PDU/PDH #	CEU #	HSW #	Class Start Date	Class End Date	Frequency	Certificate		
▼ Edit Delete	Safety Training	L1-M5 02-18 HSPP Institute-based Health and Safety Policies and Programs			0		0	0	0	0	2021-01-15	2021-01-15	1 YR			
▼ Edit Delete	Safety Training	L1-M6 02-18 Ergo Ergonomics			0		0	0	0	0	2021-01-15	2021-01-15	1 YR			
▼ Edit Delete	Safety Training	Fire Extinguishers			0		0	0	0	0	2021-02-09	2021-02-09	1 YR			
▼ Edit Delete	Safety Training	LS-H7 Basic First Aid/CPR/AED			0		0	0	0	0	2018-07-13	2018-07-13	2 YR			

If any of your courses do not have a **Class Start Date** and **Class End Date**, please click on the **Edit** link to the left of the row and the course form will display where you can select the dates.

[Edit](#) [Delete](#) Sophia Mazurczyk Safety Training PSFEI 1 0 0 0 2021-01-01 2021-12-31

New	Apply To	Training	Description	Location	Cost	Provider	Duration (Hour)	PDU/PDH #	CEU #	HSW #	Class Start Date	Class End Date	Frequency	Certificate
Apply To: <input type="checkbox"/> Select All <input checked="" type="checkbox"/> Safety Training <input type="checkbox"/> PHP (Project Management Professional)		Training:* L1-M5 02-18 HSPP Institute-based Health and Safety Policies and Programs												
Description: Cost: 0.0 Duration (Hour):* 0 CEU #: 0 Class Start Date:* 1/15/2021 Frequency: 1 YR		Location: Provider: PDU/PDH #: 0 HSW #: 0.0 Class End Date:* 1/15/2021 Certificate: Drop Rate(s) here <input type="button" value="Browse..."/>												

Update Cancel

To select a date for Class Start Date and Class End Date, please click on the down arrow(dropdown) of that data item and a Calendar control will display where then you can easily select the appropriate date for both. After all edits have been made on the form, please click on the Update link on the bottom right of the form to save it or Cancel to exit without saving.

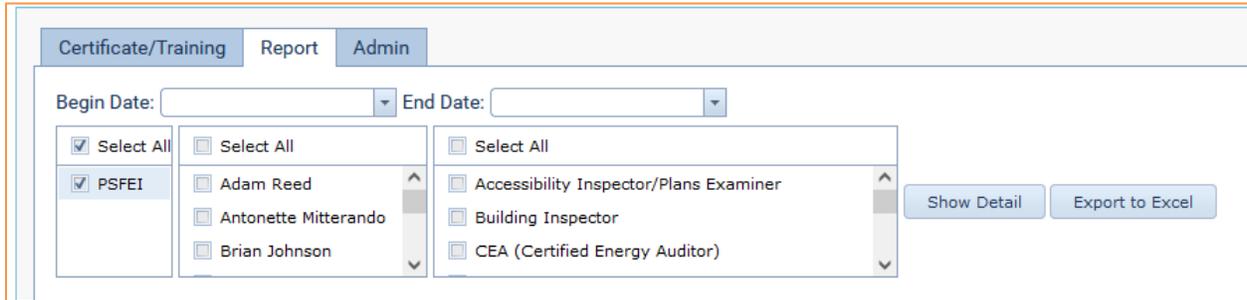
The example below shows the required Safety Training for an IT Team member has been completed. The Class Start and Class End dates have been updated.

Certificate/Training																	
Report Admin																	
New	Name	Certific...	Organi...	Member ID	Grant Date	Duration (Year)	Required PDU/PDH #	Total PDU/PDH #	Required CEU #	Total CEU #	Required HSW #	Total HSW #	Begin Date	Expirat... Date	Next Training Date	Remin... Date	Certificate
<a href="#">Edit</a> <a href="#">Delete</a>	Sophia Mazurczyk	Safety Training	PSFEI			1		0		0		0	2021-01-01	2021-12-31			
New	Apply To	Training	Description	Location	Cost	Provider	Duration (Hour)	PDU/PDH #	CEU #	HSW #	Class Start Date	Class End Date	Frequency	Certificate			
<a href="#">Edit</a> <a href="#">Delete</a>	Safety Training	L1-M5 02-18 HSPP Institute-based Health and Safety Policies and Programs			0			0	0	0	0	2021-01-15	2021-01-15	1 YR			
<a href="#">Edit</a> <a href="#">Delete</a>	Safety Training	L1-M6 02-18 Ergo Ergonomics			0			0	0	0	0	2021-01-15	2021-01-15	1 YR			
<a href="#">Edit</a> <a href="#">Delete</a>	Safety Training	Fire Extinguishers			0			0	0	0	0	2021-02-09	2021-02-09	1 YR			

### 2.4.3 Safety Training Reporting

This function may be utilized by staff, staff’s managers, Safety Committee, and PSFEI CAS administrators to run reports on our Safety Training. The Report function is View Only and does not allow users to edit historical records.

To access this feature, click on the Report tab while in the User Profile function.



The **Begin Date** and the **End Date** will enable users to select the date range of the training. If user does not select any dates, the system defaults to the current calendar year.

The columns below the date range are: organization, employee’s name, and the certification/training.

1. The first column is the Organization and will show PSFEI.
2. The second column is the list of employees. All users will see their own name. Managers will also see a list of their own staff. Safety Mangers and PSFEI administrators will see all PSFEI staff. Click on **Select All** checkbox in the column header to select all names that appear in the list, or scroll down the column and filter the selection.
3. The third column is the list of certifications in the database. Click on **Select All** checkbox in the column header to select all certifications/trainings that appear in the list, or scroll down the column and filter the selection.

After all the selections for the 3 columns are made, please click on the **Show Detail** button to generate the report that results from your selection criteria. After the data grid with row(s) of information is displayed, it can be exported for further activities (such as emailing the list of courses to support your credential requirement) by clicking on the **Export to Excel** button.

User	Certification	Training	Cost	Required PDU/POH #	Required CEU #	Required HSW #	Total PDU/POH #	Total CEU #	Total HSW #	Class Start Date	Class End Date
Sophia Mazurczyk	Safety Training	L1-HS 02-18 HSPP Institute-based Health and Safety Policies and Programs	0				0	0	0	01/15/2021	01/15/2021
Sophia Mazurczyk	Safety Training	L1-M6 02-18 Ergo Ergonomics	0				0	0	0	01/15/2021	01/15/2021
Sophia Mazurczyk	Safety Training	Fire Extinguishers	0				0	0	0	02/09/2021	02/09/2021
Sophia Mazurczyk	Safety Training	L5-H7 Basic First Aid/CPR/AED	0				0	0	0	07/13/2018	07/13/2018
Sophia Mazurczyk	PPP (Project Management Professional)			128	0	0					

## 2.4.4 Professional Development Management

This function is part of User Profile feature of CAS and will be utilized by PSFEI staff to manage their Professional Development (PD). It will enable staff to manage their yearly PD event time and cost so when they submit PD requests, their managers can determine/approve the amount of time and money they have remaining to ensure they stay within PSFEI guidelines per fiscal year. It will also allow administrations to make changes.

To add a PD record, click on the **New** link in the column header within the Certificate/Training tab of the User Profile feature.

	New	Name	Certifica...	Organiz...	Member ID
>	Edit Delete	Sophia Mazurczyk	PMP (Project Management Professional)	PMI (Project Management Institute)	
>	Edit Delete	Sophia Mazurczyk	Safety Training	PSFEI	

Complete the following summary record for PD. Select your name in the Name required field and then select **Professional Development** option from the **Certification** required field dropdown. Some lines will be automatically pre-populated. The only other selection that needs to be specified is the Reminder Date before you click on the **Update** link on bottom right corner of the entry form to save the PD record.

The screen will refresh to include the added PD record. To add individual detailed trainings, click on the greater than sign to the left of the PD record to expand it.

Certificate/Training																				
Report Admin																				
New	Name	Certifica...	Organiz...	Member ID	Grant Date	Duration (Year)	Required PDU/PCH #	Total PDU/PCH #	Required CEU #	Total CEU #	Required HSW #	Total HSW #	Begin Date	Expiration Date	Next Training Date	Reminder Date	Remaining Budget	Remaining Hours	Certificate	
>	Edit Delete	Sophia Mazurczyk	PMP (Project Management Professional)	PMI (Project Management Institute)		2010-12-31	3	128	0.5	0	0.05	0	0	2019-12-31	2022-12-30		2022-07-01			
>	Edit Delete	Sophia Mazurczyk	Safety Training	PSFEI			1		7.66		0.766		0	2022-01-01	2022-12-31					
>	Edit Delete	Sophia Mazurczyk	Professional Development	PSFEI			1	0			0		2022-07-01	2023-06-30		2022-10-28	1500	56		

Click on the **New** link in the column header of the empty detail record to enter the specific training/course/conference, etc.

New	Apply To	Training	Course Link	Comments	Cost	Provider	Duration (Hour)	PDU/PCH #	CEU #	HSW #	Class Start Date	Class End Date	Certificate
No data to display													

Enter the required data items to capture the details. Then click on the Update link on the bottom right of the entry form to save it.

New	Apply To	Training	Course Link	Comments	Cost	Provider	Duration (Hour)	PDU/PCH #	CEU #	HSW #	Class Start Date	Class End Date	Certificate
	Apply To:	<input type="checkbox"/> Select All <input type="checkbox"/> PMP (Project Management Professional) <input type="checkbox"/> Safety Training <input checked="" type="checkbox"/> Professional Development											
	Course Link:	<input type="text" value="https://learn.isc2.org"/>			<input type="text" value="80.0"/>		<input type="text" value="4.0"/>	<input type="text" value="0.4"/>			<input type="text" value="10/31/2022"/>		
	Cost:												
	Duration (Hour):*												
	CEU #:												
	Class Start Date:*												
	Certificate:	<input type="text" value="Drop file(s) here"/> <input type="button" value="Browse..."/>											
		Training:*	<input type="text" value="NIST Cybersecurity Framework"/>										
		Comments:	<input type="text"/>										
		Provider:	<input type="text" value="ISC2"/>										
		PDU/PCH #:	<input type="text" value="4.0"/>										
		HSW #:	<input type="text" value="0.0"/>										
		Class End Date:*	<input type="text" value="10/31/2022"/>										
		<input type="button" value="Update"/> <input type="button" value="Cancel"/>											

The screen will refresh to include the added course. Notice that the summary totals were updated accordingly based on the added detailed PD record.

Certificate/Training																				
Report Admin																				
New	Name	Certifica...	Organiz...	Member ID	Grant Date	Duration (Year)	Required PDU/PCH #	Total PDU/PCH #	Required CEU #	Total CEU #	Required HSW #	Total HSW #	Begin Date	Expiration Date	Next Training Date	Reminder Date	Remaining Budget	Remaining Hours	Certificate	
>	Edit Delete	Sophia Mazurczyk	PMP (Project Management Professional)	PMI (Project Management Institute)		2010-12-31	3	128	0.5	0	0.05	0	0	2019-12-31	2022-12-30		2022-07-01			
>	Edit Delete	Sophia Mazurczyk	Safety Training	PSFEI			1		7.66		0.766		0	2022-01-01	2022-12-31					
>	Edit Delete	Sophia Mazurczyk	Professional Development	PSFEI			1	4		0.4	0	0	2022-07-01	2023-06-30		2022-10-28	1420	52		

New	Apply To	Training	Course Link	Comments	Cost	Provider	Duration (Hour)	PDU/PCH #	CEU #	HSW #	Class Start Date	Class End Date	Certificate
>	Edit Delete	Professional Development	NIST Cybersecurity Framework	Online Course Link	80	ISC2	4	4	0.4	0	2022-10-31	2022-10-31	

## 2.5 Reports

This functionality allows PSFEI administrators to run reports on courses delivered in a particular year. The details about a specific course can be obtained by clicking on the View Details link. The details contain the Course, date delivered, and who attended. The results can be exported to Excel for further data mining.

Courses Training Request User Profile **Reports** Admin

View courses for the following year: 2021 [Export to Excel](#)

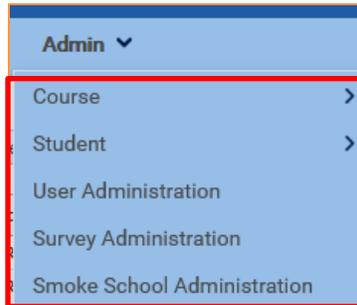
#	Course ID	Course Title	Course Title Long	Course Name	Course Type	Begin Date	Attendance	Registrations	Completed Surveys	Survey
<a href="#">View Details</a>	416	SS	Visible Emissions Training	RRMC VE 3-21 - March 8, 2021	Smoke School	08 Mar 2021	12	12	0	SurveySet_2017
<a href="#">View Details</a>	417	SS	Visible Emissions Training	RRMC VE 3-21 - March 9, 2021	Smoke School	09 Mar 2021	1	1	0	SurveySet_2017
<a href="#">View Details</a>	418	SS	Visible Emissions Training	EEG VE 3-21 - March 10, 2021	Smoke School	10 Mar 2021	8	8	0	SurveySet_2017
<a href="#">View Details</a>	415	SS	Visible Emissions Training	SS APP UAT - March 11, 2021	Smoke School	11 Mar 2021	0	0	0	SurveySet_2017
<a href="#">View Details</a>	420	SS	Visible Emissions Training	SRU VE 3-21 - March 16, 2021	Smoke School	16 Mar 2021	9	9	0	SurveySet_2017
<a href="#">View Details</a>	421	SS	Visible Emissions Training	NRG-HC VE 3-21 - March 18, 2021	Smoke School	18 Mar 2021	9	9	0	SurveySet_2017
<a href="#">View Details</a>	419	SS	Visible Emissions Training	EEG VE 3-21 - March 24, 2021	Smoke School	24 Mar 2021	9	9	0	SurveySet_2017
<a href="#">View Details</a>	424	SS	Visible Emissions Training	SGI VE 3-21 - March 29, 2021	Smoke School	29 Mar 2021	12	12	0	SurveySet_2017
<a href="#">View Details</a>	437	SS	Visible Emissions Training	USG VE 3-21 - March 31, 2021	Smoke School	31 Mar 2021	13	13	0	SurveySet_2017
<a href="#">View Details</a>	438	SS	Visible Emissions Training	USG VE 4-21 - April 1, 2021	Smoke School	01 Apr 2021	10	10	0	SurveySet_2017

Page 1 of 3 (22 items) 1 2 3

Course ID	Course Name	Course Title	Notes	Begin Date	End Date	First Name	Middle Name	Last Name	Suffix	Attendance Day
416	RRMC VE 3-21 - March 8, 2021	Visible Emissions Training		3/8/2021	3/8/2021	Tommy		Backer		3/8/2021

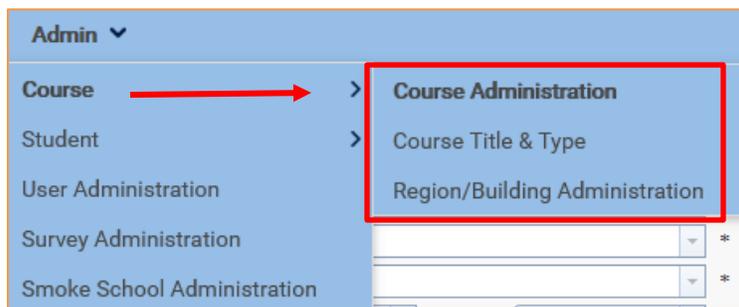
## 2.6 Admin

The Admin menu is used by PSFEI Administrators. It contains administrative functionality such as Course management, Student management, User Administration, Survey Administration, and Smoke School Administration. The Course and the Student selections contain further sub functions.



### 2.6.1 Course

The Course administrative functionality contains the Course Administration, Course Title & Type, and Region/Building Administration sub functions.



#### 2.6.1.1 Course Administration

Course administration enables the administrators of the system to create new courses, edit existing courses, link instructor(s) to a course and add or edit course material to a course.

Create New Course

Course: ProFM Credential Instructor-Assisted Course \*

Title: ProFM - ProFM Credential Instructor-Assisted Co \*

Type: ProFM \*

Region: ProFM - ProFM \*

Dates: 4/14/2020 through 4/16/2020 \*

Building: Online Course \*

Address 1:

Address 2:

City:

State:

Zipcode:

Survey Set: SurveySet\_2017 \*

Number Hours: 40 Minutes: 0 \*

Hide from HQ:

Active:

Notes:

**Instructors:**

Export to Excel

New	Nº	User Name	First Name	Middle	Last Name	Picture	Email	Telephone	Address
-----	----	-----------	------------	--------	-----------	---------	-------	-----------	---------

To create a new course, administrator clicks on the Create New Course button on top and enters or makes selections for the available options, then clicks on the Save button on the bottom of the form to save.

Create New Course

Course: \*

Title: \*

Type: \*

Region: \*

Dates: through \*

Building: \*

Address 1:

Address 2:

City:

State:

Zipcode:

Survey Set: \*

Number Hours: Minutes: \*

Hide from HQ:

Active:

Notes:

**Instructors:**

Export to Excel

#	Nº	Name	Picture	Email	Telephone	Address
---	----	------	---------	-------	-----------	---------

To add an instructor to the course, administrator clicks on the “New” column within the header of the Instructor section of the page and a row will be added at the bottom of the Instructor section. The dropdown in the Name column is prepopulated with existing instructors in the system. When selected,

the instructor information is filled in. Clicking on the “Update” link will associate the instructor with the course.

Instructors:		Export to Excel					
New	Nº	Name	Picture	Email	Telephone	Address	
Edit	1	Susan Burket		sburket@enr.psu.edu	(614) 867-4413		Delete
Edit	2	C. Tom Dowling		ctd2@enr.psu.edu	(614) 865-9976		Delete
Update Cancel							

To add new course material to the course, administrator clicks on the Browse button to get to the folder where the course material files reside. Multiple files can be selected. The CAS course administrator could then specify the order that the files will be uploaded and displayed. If one of the files needs to be re-uploaded, the same file name needs to be specified.

**Course Material:**

Allowed file extensions: .jpg, .jpeg, .gif, .png, .pdf, .xlsx, .pptx, .ppsx, .docx

Select multiple files... Browse...

Please specify upload order:

Up Down

Upload Course Material

### 2.6.1.2 Course Title & Type

When a user clicks on the Admin → Course → Course Title & Type, all course titles and course types are displayed. Users have the option to display active and inactive course titles by clicking on the Include Inactive check box.

Please note that not all user roles will have the Add new, Edit, or Delete capability. The list of course titles can be exported to Excel by clicking on the Export to Excel button.

Include Inactive  Export to Excel

New	№	Abbreviation	Course Title	Notes	Active	
Edit	1	ARC	Arc Flash		<input checked="" type="checkbox"/>	Delete
Edit	2	CORE	Core Competencies		<input checked="" type="checkbox"/>	Delete
Edit	3	FHPB	Fundamentals of High Performing Buildings	Previously FHPSB (Fundamentals of High Performing Smart Buildings)	<input checked="" type="checkbox"/>	
Edit	4	FIFT	Facility Infrastructure Fundamentals Training		<input checked="" type="checkbox"/>	
Edit	5	SBOT	Smart Building Operations Training		<input checked="" type="checkbox"/>	
Edit	6	HVAC	HVAC Fundamentals		<input checked="" type="checkbox"/>	Delete
Edit	7	Custom	Tailored Instruction		<input checked="" type="checkbox"/>	
Edit	8	EFOM	Effective Facility Operations and Maintenance Training		<input checked="" type="checkbox"/>	
Edit	9	FWCM	Facilities Water Conservation and Management		<input checked="" type="checkbox"/>	
Edit	10	SS	Visible Emissions Training		<input checked="" type="checkbox"/>	

Page 1 of 4 (35 items) 1 2 3 4 ...

#	№	Type Description	Active
1		GSA	<input checked="" type="checkbox"/>
2		Smoke School	<input checked="" type="checkbox"/>

To add a new course title, click on the “New” column heading and a new row will be displayed below the list of course titles for the administrator to enter the required information. After entering the Abbreviation, Course Title, and/or Notes, the user can click the Update link to save the course title into the system or Cancel to exit the function.

Update Cancel  \*  \*

To add a new course type, please let the IT manager know the requirements for the course type – i.e., if surveys are required or if any additional processing needs to be done/programmed into the software for the requested course type.

### 2.6.1.3 Region/Building Administration

Building/Region Administration functionality enables administrators to add, modify, deactivate, and delete regions and buildings. PSFEI administrator access this function from Admin → Course → Region/Building Administration.

The screenshot shows two tables. The top table, titled 'Regions', has columns for 'New', 'NP', 'Code', 'Name', 'Notes', and 'Active'. It lists 10 regions with their respective codes and notes. The bottom table, titled 'Buildings', has columns for 'New', 'NP', 'Name', 'Street Address1', 'Street Address2', 'City', 'State', 'Zipcode', 'Notes', 'Active', 'Picture', and 'Region'. It shows one building record: '50 United Nations Plz' in San Francisco, CA.

New	NP	Code	Name	Notes	Active
Edit	1	01	New England Region	VT, NH, ME, MA, RI, CT	<input checked="" type="checkbox"/>
Edit	2	02	Northeast and Caribbean	NY, NJ, Virgin Islands, Puerto Rico	<input checked="" type="checkbox"/>
Edit	3	03	Mid-Atlantic	PA, MD, VA, WV, DE, Europe, Africa, Middle East	<input checked="" type="checkbox"/>
Edit	4	04	Southeast Sunbelt	KY, TN, NC, SC, MS, AL, GA, FL	<input checked="" type="checkbox"/>
Edit	5	05	Great Lakes	MN, WI, MI, IL, IN, OH	<input checked="" type="checkbox"/>
Edit	6	06	Heartland	NE, IA, KS, MO	<input checked="" type="checkbox"/>
Edit	7	07	Greater Southwest	NM, OK, AR, TX, LA	<input checked="" type="checkbox"/>
Edit	8	08	Rocky Mountain	MT, ND, SD, WY, UT, CO	<input checked="" type="checkbox"/>
Edit	9	09	Pacific Rim	CA, NV, AZ, HI, American Samoa, East Asia, Guam	<input checked="" type="checkbox"/>
Edit	10	10	Northwest/Arctic	WA, OR, ID, AK	<input checked="" type="checkbox"/>

New	NP	Name	Street Address1	Street Address2	City	State	Zipcode	Notes	Active	Picture	Region
Edit	1	50 United Nations Plz	50 United Nations Plz		San Francisco	CA	94102-4912		<input checked="" type="checkbox"/>		09 - Pacific Rim

Clicking on the New link in the column header adds a new row on the bottom of the region grid where then the administrator can enter the appropriate data and add the new record to the system.

The screenshot shows the 'Edit' form for a region. The 'NP' field is set to '10', the 'Code' field is '10', and the 'Name' field is 'Northwest/Arctic'. The 'Notes' field contains 'WA, OR, ID, AK'. There is an 'Active' checkbox which is checked. Below the form are 'Update' and 'Cancel' buttons. At the bottom, it says 'Page 1 of 2 (12 items)' with navigation arrows.

“Include Inactive” check mark selection includes regions that are inactive in the display. Exporting to Excel is also possible with the “Export to Excel” button.

Modifying a region is possible by clicking on the Edit link of the row containing the region needing a change. The row will then be enabled for editing and the Edit link will become Update Cancel. Administrator enters the required information the clicks on the Update link to save the changes or Cancel link to exit.

The screenshot shows the 'Update Cancel' form for a region. The 'NP' field is set to '01', the 'Code' field is '01', and the 'Name' field is 'New England Region'. The 'Notes' field contains 'VT, NH, ME, MA, RI, CT'. There is an 'Active' checkbox which is checked. Below the form are 'Update' and 'Cancel' buttons. At the bottom, it says 'Page 1 of 2 (12 items)' with navigation arrows.

Deleting a region may be accomplished by clicking on the Delete link on the right side of the view. If a region is being utilized by the system, it cannot be deleted.

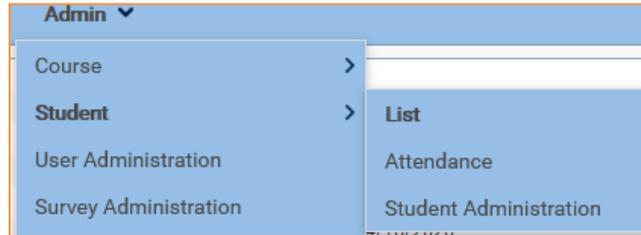
There are only about 10 records that may be displayed on a page at one time. Therefore, the bottom of the page lists the number of items and the number of pages available for viewing.

The screenshot shows the pagination controls at the bottom of the page. It says 'Page 1 of 2 (12 items)' with navigation arrows for previous, next, and search.

The Buildings functionality works the same way as the Regions regarding being able to add, edit, and delete a building and also paging through the list of buildings.

## 2.6.2 Student

PSFEI administrator utilize this function to manage students lists, attendance, and student administration.



### 2.6.2.1 Student List

The Student functionality provides a view of all students enrolled in a course. PSFEI administrators or instruction access this functionality from Admin → Student → List. The list of students may be exported to Excel by clicking on the “Export to Excel” button. In the example below, there are 28 items/rows of students or 3 pages.

Course: Intern Safety LI-M1 01-18 Haz Com/GHS & PPE  
Title: PSFEI - PSFEI Employee Training  
Region: PSFEI - PSFEI  
Dates: 1/23/2018 to 1/23/2018  
Location: PSFEI  
135 E. Nittany Ave.  
Suite 414  
State College, PA 16801

Export to Excel

№	UserName	First Name	Middle	Last Name	Title	Email	Work Phone	Mobile Ph
1	mjm6673	Matthew		McCallion	PSFEI Intern	mjm6673@psu.edu		
2	esohn	Erik		Sohn		ESohn@enr.psu.edu	814-865-8876	

### 2.6.2.2 Student Attendance

The Attendance functionality is for the instructor or PSFEI administrator to record student’s daily attendance of the course. They can access this functionality from Admin → Student → Attendance. The attendance page displays the number of days the course runs.

Course: SJM Test Course  
 Title: sjmTest - Sophia Test Course  
 Region: 01 - New England Region  
 Dates: 2/11/2016 to 2/12/2016  
 Location:

Please select a course date row below.

Select	Date	Attendance Completed
<input checked="" type="radio"/>	Thu 11 Feb 2016	Yes
<input type="radio"/>	Fri 12 Feb 2016	Yes

When an instructor clicks on a row of the Select column, a list of students will appear and their attendance status. Instructor can select each individual student's attendance one at a time or select them all at once. Clicking on the "Submit" button saves the attendance record into the system.

Instructor must complete students' attendance record for each student and for every day the course is taught.

Course: Intern Safety L1-M1 01-18 Haz Com/GHS & PPE  
 Title: PSFEI - PSFEI Employee Training  
 Region: PSFEI - PSFEI  
 Dates: 1/23/2018 to 1/23/2018  
 Location: PSFEI  
 135 E. Nittany Ave.  
 Suite 414  
 State College, PA 16801

Please select a course date row below.

Select	Date	Attendance Completed
<input checked="" type="radio"/>	Tue 23 Jan 2018	Yes

Check/uncheck the attendance entries, then click on Submit.

Select All	User Name	First Name	Middle	Last Name	Email
<input checked="" type="checkbox"/>	esohn	Erik		Sohn	ESohn@engr.psu.edu
<input checked="" type="checkbox"/>	mjm6673	Matthew		McCallion	mjm6673@psu.edu

Submit

### 2.6.2.3 Student Administration

Student Administration functionality enables students to be added, modified, and deleted to a course. PSFEI administrator access the functionality from Admin → Student → Student Administration.

The screenshot displays the Student Administration interface. At the top, there is a header box with the following information: Region: PSFEI - PSFEI, Dates: 1/23/2018 to 1/23/2018, and Location: PSFEI, 135 E. Nittany Ave., Suite 414, State College, PA 16801. Below the header, there are three buttons: "Export to Excel", "Print Roster", and "Resend Activation Email". A table of students is shown with columns: New, ID, Username, First Name, Middle, Last Name, Title, Email, Resend Activation, Work Phone, and Mobile. The table contains two rows of student data. Below the table is a "Bulk Registration" section with instructions on how to import multiple students. It includes a "Browse..." button for uploading a template file, a checkbox for "Send Emails to Students", and an "OK" button. At the bottom of the interface, there are two buttons: "Print Certificates of Completion" and "Print Student Tents".

New	ID	Username	First Name	Middle	Last Name	Title	Email	Resend Activation	Work Phone	Mobile
Edit	1	mjm6673	Matthew		McCallion	PSFEI Intern	mjm6673@psu.edu	<input type="checkbox"/>		
Edit	2	esohn	Erik		Sohn		ESohn@engr.psu.edu	<input type="checkbox"/>	814-865-8876	

When “New” link is clicked in header’s first column, a form opens to enter the student information. Update Cancel links may be found on the bottom right of the grid.

The screenshot shows a form for entering student information. The fields are: User (dropdown), First Name, Middle Name, Last Name, Layout Item, Title, Email, Work Telephone, Mobile Telephone, Fax, GSA Office Symbol, Region ID (dropdown), Is Approved (checkbox), Is Locked Out (checkbox), Comment (text area), Street Address1, Street Address2, City, State, and Zipcode. At the bottom right, there are "Update" and "Cancel" buttons.

It also supports a bulk registration upload of students into a system.

### Print Certificates

This function allows printing of certificates of completion by using the Print Certificates of Completion button on the bottom of the screen. When clicked, a PDF file type will be created and displayed

containing all the students in the completed class. Administrator can then send the pdf file to a printer. The following is a sample certificate. It is currently signed by PSFEI Program Manager, Bill Lash.



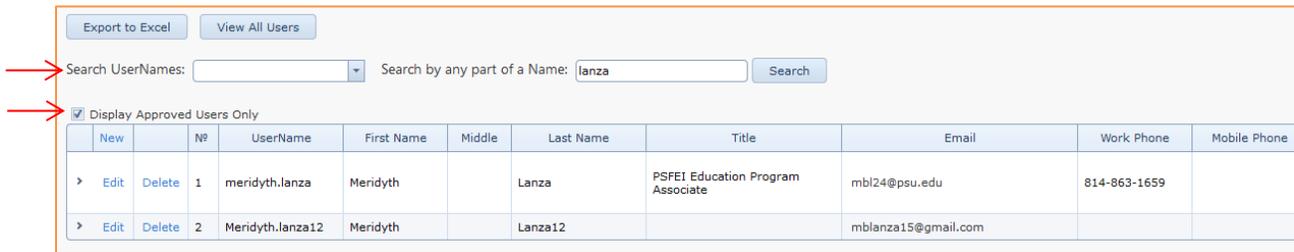
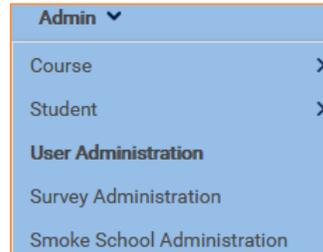
### ***Print Student Tents***

Printing of Student Tents, by clicking on the Print Student Tents button on the bottom, works the same way as printing certificates of completion where a PDF file is created dynamically listing all the students in the class and the PDF file may then be sent to a printer. The printed sheets are then folded in the middle to form a tent.



### 2.6.3 User Administration

User Administration function enables administrators to add, modify, and delete users. PSFEI administrator access this function from the Admin → User Administration.



There are a lot of users in CAS so rather than paging through the extensive list, an administrator may search by user's username or any part of user's name.

"Display Approved Users Only" check mark selection displays results of users that are active.

Deleting a user may be accomplished by clicking on the "Delete" link on the right side of the view.

There are only about 10 records that may be displayed on a page at one time. Therefore, the bottom of the page lists the number of items/users and the number of pages available for viewing. Clicking on the "All" button allows users to scroll across multiple pages by using the scroll bar to the right of the view.

Exporting to Excel is also possible with the "Export to Excel" button if further manipulation of names is required for other purpose than provided by the system.

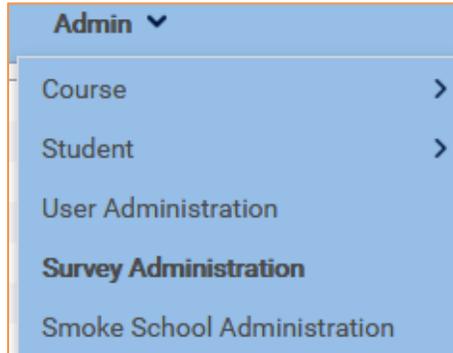
Clicking on the "New" link in the column header enables administrator to add a new user to the system.

Modifying a user is possible by clicking on the "Edit" link of the row containing the user needing change. Both the new and edit capture an identical user information.

User Name:\*   
 First Name:\*   
 Middle Name:   
 Last Name:\*   
 Suffix:   
 Title:   
 Email:\*   
 Work Telephone:   
 Mobile Telephone:   
 Fax:   
 GSA Office Symbol:   
 Region ID:\*   
 Is Approved:   
 Is Locked Out:   
 Comment:   
 Street Address1:   
 Street Address2:   
 City:   
 State:   
 Zipcode:   
 Picture:   
 Signature:    
 Roles:  CBSAdmin  FEIAdmin  GSAdmin  GSAHQ  
 Require Unique Email:

## 2.6.4 Survey Administration

Survey Administration function enables administrators to view how many students responded to the survey and to remind students to complete their course survey. PSFEI administrator access this function from the Admin → Survey Administration.



**Course:** ProFM Credential Instructor-Assisted Course

**Title:** ProFM - ProFM Credential Instructor-Assisted Course

**Region:** ProFM - ProFM

**Dates:** 4/14/2020 to 4/16/2020

**Location:** Online Course

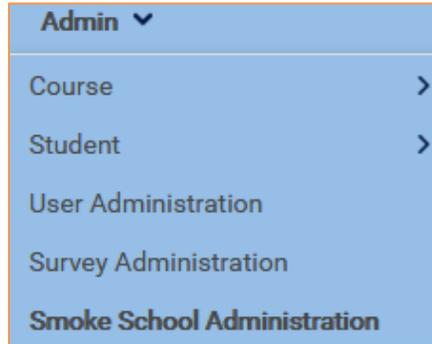
**# of Students:** 6

**# of Completed Surveys:** 4

№	ID	UserName	First Name	Middle	Last Name	Title	Send Survey Reminder	Email
1	4785	nicholas.clark	Nicholas		Clark	DGS Chief, Mechanical Division	<input type="checkbox"/>	niclark@ca.gov

## 2.6.5 Smoke School Administration

Smoke School Administration function enables administrators to manage sending out certificate of completion to Smoke School students. PSFEI administrator access this function from the Admin → Smoke School Administration.



**Course:** P-LV VE 10-17 - October 11, 2017  
**Title:** SS - Visible Emissions Training  
**Region:** SS-PSU-LV - Penn State Lehigh Valley  
**Dates:** 10/11/2017 to 10/11/2017  
**Location:** Penn State Lehigh Valley  
Center Valley, PA

[Export to Excel](#) [Email Certificates](#)

Nº	ID	UserName	First Name	Middle	Last Name	Title	Email Certificates	Certificate Sent	Email
1	1688	ray.aialli	Ray		Aialli		<input type="checkbox"/>		ray.aialli@arcsolemittal.com