2013

Online Apprentice Tracking System User's Guide V.11.4.114

International Association of Bridge, Structural, Ornamental And Reinforcing Iron Workers

Apprentice Tracking System
User's Guide

Developed by

IRONWORKER MANAGEMENT PROGRESSIVE ACTION COOPERATIVE TRUST

And

NATIONAL IRONWORKERS AND EMPLOYERS APPRENTICESHIP TRAINING AND JOURNEYMAN UPGRADING FUND

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International Association of Bridge, Structural, Ornamental and Reinforcing Iron Workers

Table of Contents

Preface

The Online Apprentice Tracking System is a customized application developed to assist your record keeping process. The National Fund will support this application to ensure that the system satisfies the needs of the Apprenticeship Training Center. This system has been upgraded and migrated to a Web-based application integrated with the International's membership database for supporting all aspects of operating a training center.

The system configuration customization is provided via a security model which controls the system's look, functional capabilities, and user access.

Additional customization is available via the Admin area for Course and Certifications. If you have used the previous desktop based application your data will be converted into the new environment. The system also conforms to the structure and functionality of the current ATS desktop system while integrating the records into the International membership database.

Minimized manual startup efforts have been achieved through:

1. The implementation of preloaded information
2. Default templates
3. The ability to build the members records from the International's database without re-keying
4. Address and status syncing
5. Certification card generation
6. Trust fund employment information

The system is continuing to evolve as new requirements and enhancements are made.

How to use this guide

This guide is designed for people who update records for their JATC and for people who administer the Online Apprenticeship Tracking System for their JATC. If you look to the left of the screen you will see a tab that reads 'bookmarks'. Click on this button to allow you to jump to different sections of the manual that are of interest to you.

- If you are ready to customized the options for your ATS and set up user accounts, see 'Setting up Your JATC'.
- If your JATC has already been set up and you need to edit members' records and perform searches, see 'Tracking Apprentices'.
- Each heading on the left will jump to that particular subject in the manual. This will save you the time of scrolling through the manual looking for something that is of interest to you.

Getting started

Configure your browser

With this Web-based system you will need high-speed access to the Internet and should be using Internet Explorer version 9 or higher. You will also want to make sure you have applied all Microsoft security updates using Windows Update. This will ensure that you have the most up to date software. All the information transmitted to and from this site is encrypted for a high level of security similar to the way credit card transactions are processed across the Internet.

Before you log in to the ATS, make the ATS site a trusted-site and turn on pop-up windows in your browser. This will allow the ATS to operate properly. The following directions assume that you are using Internet Explorer version 9 or higher.

How to set the ATS site as a trusted site

1. Click the 'Start' button.
2. Navigate to 'Control Panel'.
3. Double click on 'Internet Options'.
4. Click the 'Security' tab on the top of the window.
5. You will see four zones at the top of the screen. Click on the zone named 'Trusted Sites'.
6. Click the 'Sites' button.
7. Type in the address of the ATS site and click 'add'. This is the address that you use to access the ATS site. It was sent to you in an email.
8. The ATS site is now listed as a Trusted Site and you can close all open dialog boxes.

How to configure your browser to allow cookies for this site

1. Click the 'Start' button.
2. Navigate to 'Control Panel'.
3. Double click on 'Internet Options'.
4. Click the 'Privacy' tab on the top of the window.
5. Click the button labeled as 'Sites'.
6. Enter in 'iwintl.org' in the box labeled 'Address of Website'.
7. Click 'Allow'.
8. Click 'Ok'.

How to allow pop-ups for the ATS

1. Click the 'Start' button.
2. Navigate to 'Control Panel'.
3. Double click on 'Internet Options'.
4. Click the 'Privacy' tab on the top of the window.
5. At the bottom of the dialog box check to see whether the pop-up blocker is turned on or off. If it is off then the ATS will work correctly. If the pop-up blocker is turned on, click the 'Settings' button.
6. Type in the address of the ATS site and click 'add'. This is the address that you use to access the ATS site. It was sent to you in an email.

7. The ATS site is now added to the list of pop-ups which are allowed and you can close all open dialog boxes.

Logging in

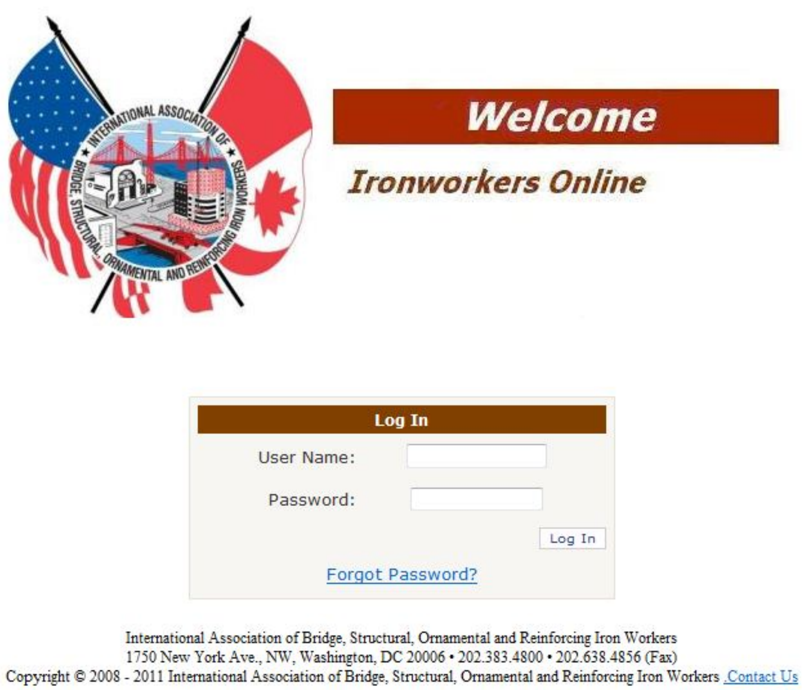
To open the Ironworkers' Online Apprentice Tracking System, click on the link provided to you by the National Fund. There is no software to install or other requirements except that you must be using a computer that has Internet access.

Before logging in, notice the links on the logon page. The first link which reads 'Forgot Password' is where you will click if you cannot remember your password. (Be sure not to guess at your password if you do not know it. If you guess incorrectly five times, you will be locked out of the system. If you are locked out of the system, you will need to call the International and have your account unlocked.) Clicking on this link will bring up a new page that will prompt you for your username and the answer to a secret question that was setup when the account was created. If you enter the information correctly, your password will be sent via email to the email address that corresponds with that username.

The last link 'Contact Us' is where you will click if you are having problems with the system. Simply click on this link to email support. We will get back to you as soon as possible.

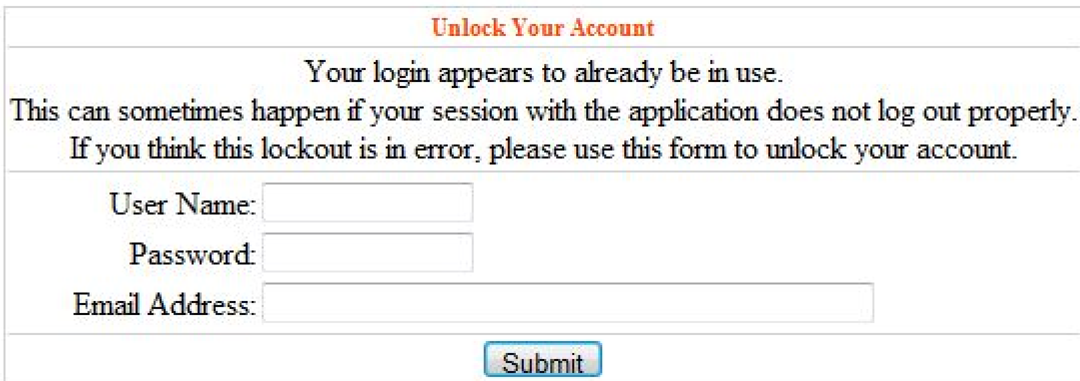
1. Enter you user name and password.
2. Click 'Log In'.
3. Note: If this is your first time logging in, you will be prompted to reset your password. Enter your new password and click the 'Submit' button.

Note: Your password must be at least six characters and no more than twenty. Your password can not contain the number zero. You must use at least one special character in your password. Special characters are .$&#@!.



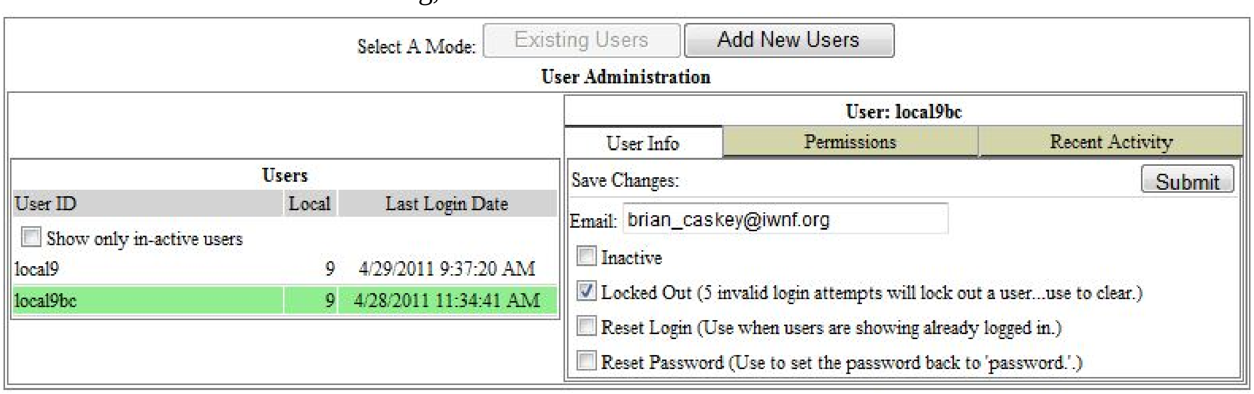
Unable to login

The first and most common reason for his happening is incorrectly closing out of the system. On the top navigation menu to the far right you will see a link that is labeled 'Logoff'. It looks like the image you see here. When you are ready to close out of the system, you must click on this link. Sometimes users make the mistake of closing out by hitting the 'X' in the upper right hand corner of the Internet browser. Doing this will lock you out of the system. The system could also close out improperly if you suddenly lose your Internet connection. This situation doesn't happen very often but if it does, the program will close unexpectedly causing you to then be unable to log back in. If you fall under this condition and you try to log back into the system, you will see a screen similar to the one you see here. Enter in the correct information and your account will be reset automatically. You will then be taken back to the login screen where you will be able to login successfully.



The second reason for being unable to log in to the system is that you are entering in the wrong password. If you enter in the wrong password five times you will be locked out of the system. If you fall into this category, you will need to either email atssupport@iwintl.org to have someone with admin rights unlock your account or follow these directions. Log in to the ATS with a different account that has full read, write, and permissions for the 'Security' zone and follow these steps:

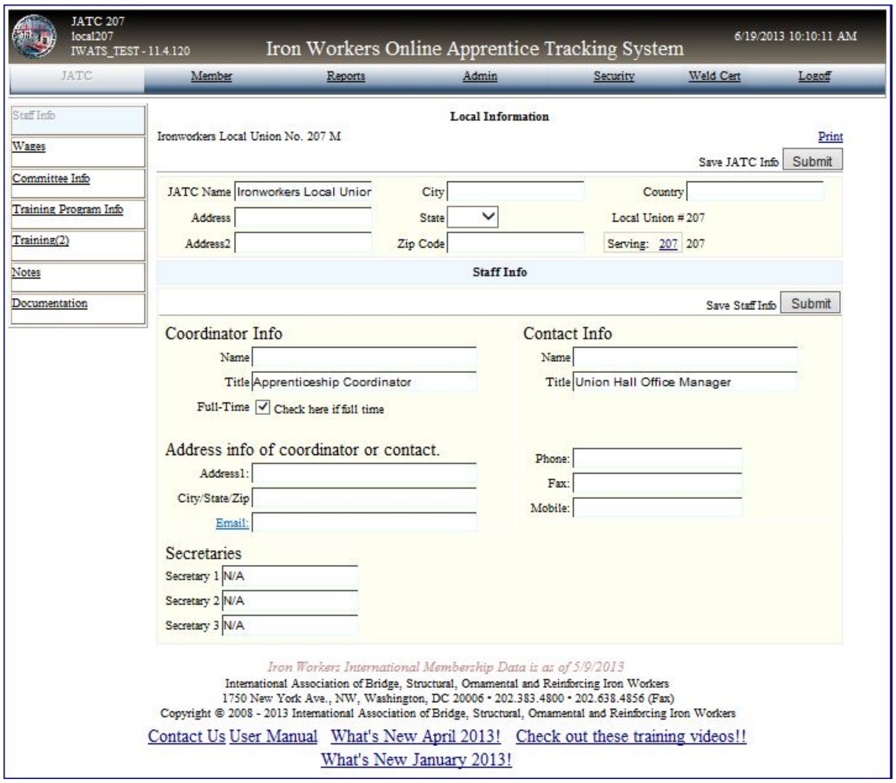
1. Click the 'Security' tab located on the top menu.
2. Under the 'User ID' heading, click the user id of the account that is locked out.



3. On the right side of the screen you will notice that the 'Locked Out' option has been checked. This confirms that this account is locked out. Uncheck this box by clicking on it.
4. Click 'Submit' to save your changes.
5. The user should now be able to login.

Navigating the ATS

The ATS has a primary tab navigation located at the top of the screen that includes seven main sections: JATC, Member, Reports, Admin, Security, Weld Cert, and Logoff. **IT IS VERY IMPORTANT THAT YOU HIT THE LOGOFF BUTTON WHEN YOU ARE READY TO EXIT THE PROGRAM.** If



you accidentally hit the 'X' to close out, your account will need to be reset before you can get back into the program. You can access each section by clicking on the section's name. Once clicked, each section will then display additional options down the left side of the screen. The options on the left will vary depending on which tab you are working with.

On every screen, the name of the ATS database, user name, and current version of the ATS is displayed in the upper left corner. In the upper right corner, the current date is displayed. Also note the date at the bottom of the window labeled above as 'Ironworkers International Membership Data is as of 5/9/2013'. This date indicates the last time your local union provided the International with data from the Local Union System. This date will change frequently as the International updates its records.

Notice the links at the bottom of the site. The first link, 'Contact Us', will be used if you have questions or comments about the system. Clicking this link will allow you to send an email to ATSSupport@iwintl.org and your questions will be answered in a timely manner. To the right of 'Contact Us' you will see a link to this user manual. The next link you should see is the 'What's New' link. This link is updated to show new features that have been added to the system. The new features are listed here along with the page numbers of where you can read more on that feature in this user manual. Lastly is a link to some basic training videos. These videos are here to help you with a few main processes that should be used by every Jatc.

JATC

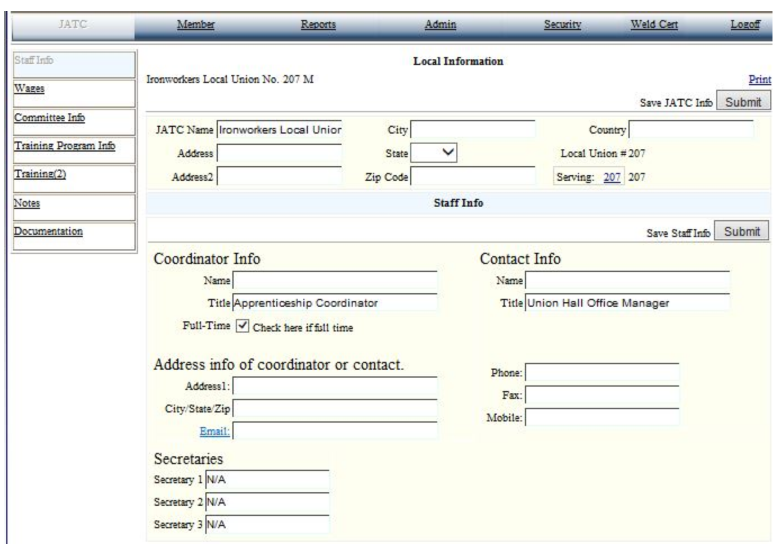
The default screen that you will see after logging in will be the JATC tab. This page maintains information about your training center including data about staff, wages, committees, training programs, relevant notes, and documentation. If your information has been preloaded, review all data for accuracy. It is important to fill this information in before entering any other information into the system. The left hand navigation is used to collect information that will be used throughout the system.

Staff Info

Enter detailed information including your JATC's address, the coordinator's name and contact information, and secretaries' names. Be sure to click 'Submit' after making any changes to save your work.

How to edit staff and local information

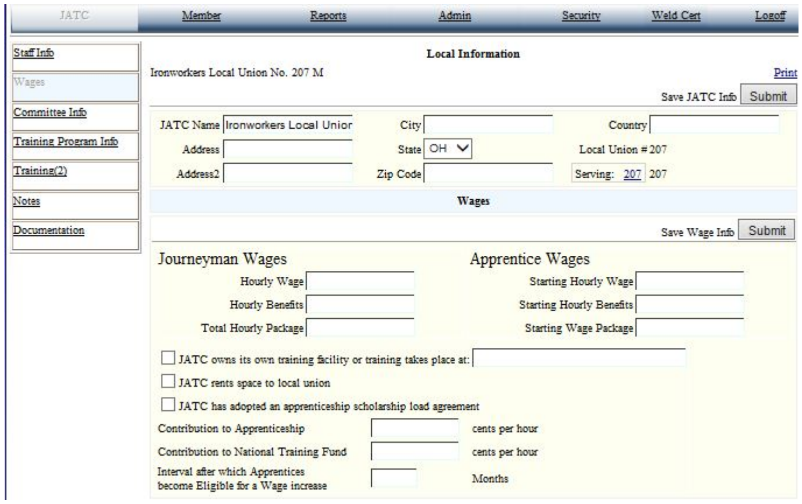
1. Click the 'JATC' tab
2. Under the 'Local Information' heading, review and edit, if necessary, the contact information for your local. Note: Notice the blue links that are underlined. Any item that is blue and underlined will allow you to click on that item and do more for you. Clicking on 'Print' will open up a report that will print all the details you have entered about your JATC.



3. Click the 'Submit' button to save your changes.
4. Under the 'Staff Info' heading, review and edit, if necessary, the coordinators' name, address, and contact information.
5. Enter the names of your local's secretaries and click the 'Submit' button to save your changes.

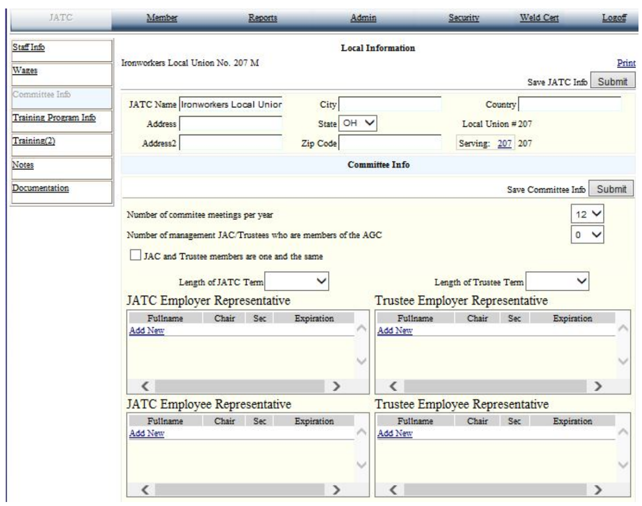
Wages

When you first start using the tracking system, this area will not be preloaded for you. You will need to enter the journeyman wages and apprentice wages that pertain to your particular local. It is particularly important to fill out the 'interval after which apprentices become eligible for a wage increase'. This information will be used to allow you to track wage increases for apprentices in another section of the system.



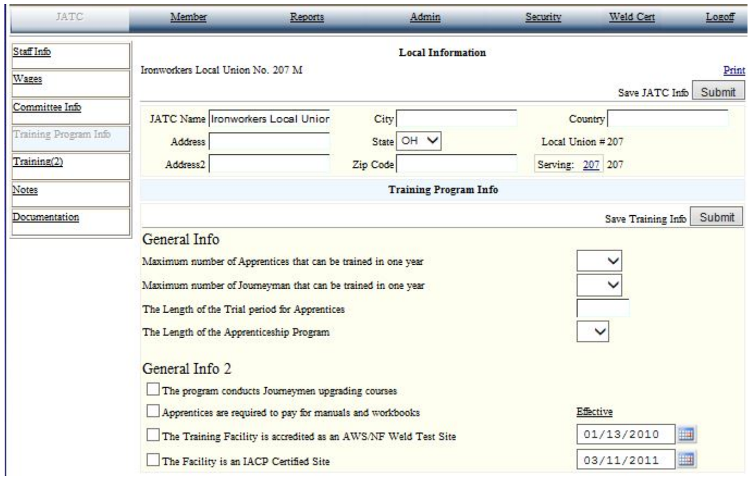
Committee info

This section under the JATC tab displays information on your committee such as number of meetings per year, length of terms, and names of both JATC and Trustee employer and employee representatives. This particular information is not used in the system but is here for your own records.



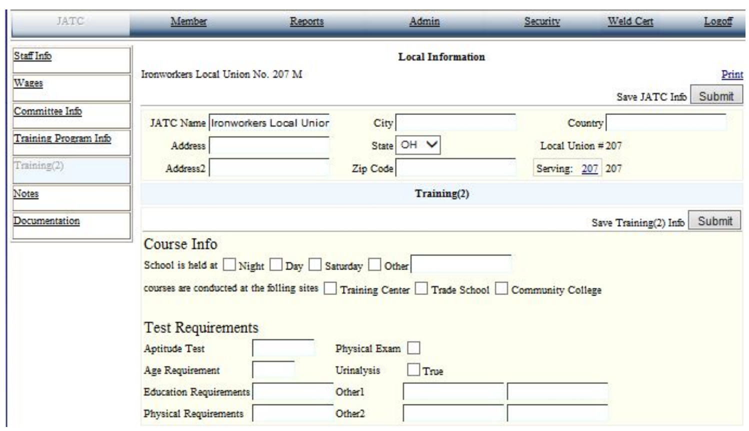
Training program info

This is where you will find general information about your training program. It is particularly important to fill out the 'length of the apprenticeship program'. It controls the apprentice year drop down for assigning what year an apprentice is in (eq: 1st yr, 2nd yr, 3rd yr). There are two new options that have recently been added to the tracking system. Check the box if your facility is an accredited welding facility. There is also an option to enter in the date of when your facility became accredited. There is also a check box which you should check if your facility is an IACP certified site. This option also provides a date of when your facility became certified. Documentation for these options can be uploaded here.



Training (2)

Displays details about your school including if classes are held at night, day, Saturdays, or another time, and where courses are conducted (i.e., training center, trade school, or community college). The information you enter in the test requirements area will have an impact on how applicants are ranked later on in the system.



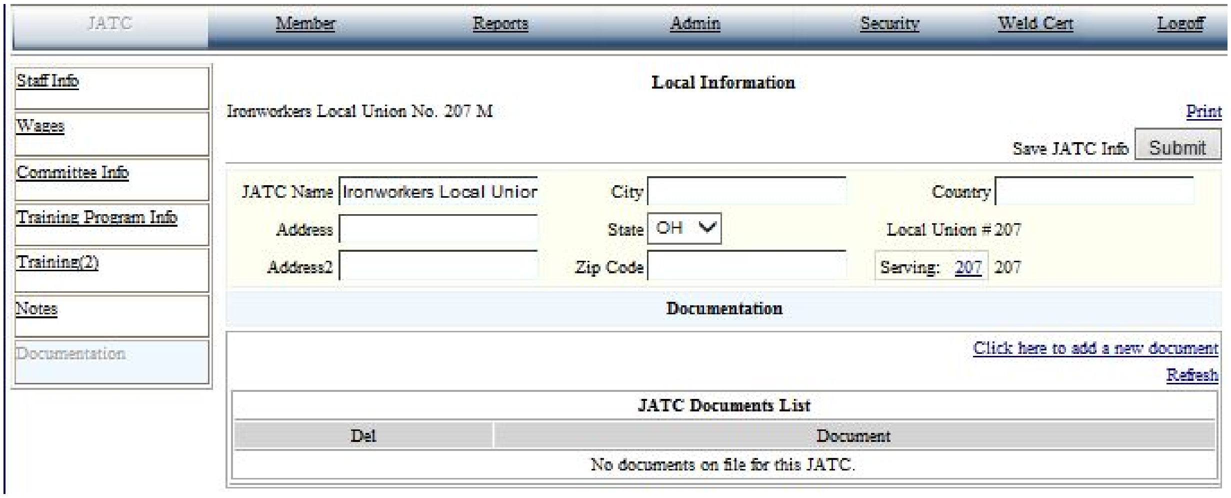
Notes

Notes allow you to enter any notes about your school that you would like to keep in the system for your own records. Be sure to click the 'Submit' button to save your changes.

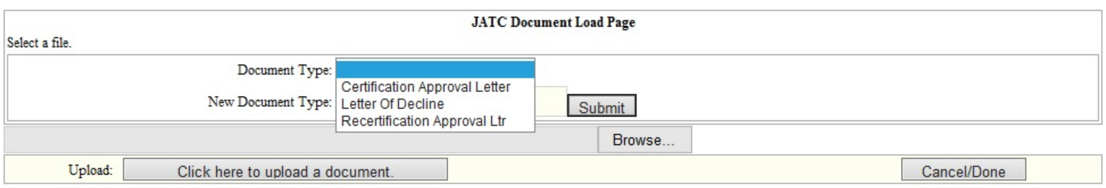
Documentation

Documentation allows you to upload proof of IACP certification and/or proof that your school is a welding certified facility. Any other type of documentation that you would like to store here pertaining to your school is permitted as well.

1. Click on the link labeled 'click here to add a new document' to begin the process of uploading a document.
2. A new window will open and you will first need to choose a 'file type'. If there are no 'file types' available in the drop down box, you will need to create a new file type.



3. Create a 'file type' by entering in the name of the documentation in the empty box provided. Click 'Submit' to add that file type to the drop down box. You can now choose that file type from the drop down box. We request that you upload the three documents listed in the image below.
4. Click 'Browse' and locate the file that you would like to upload to the system.



5. Click the button labeled 'Click here to upload a document'.
6. Once your document has finished uploading, close the window and click 'refresh'. You should see a link to your document.

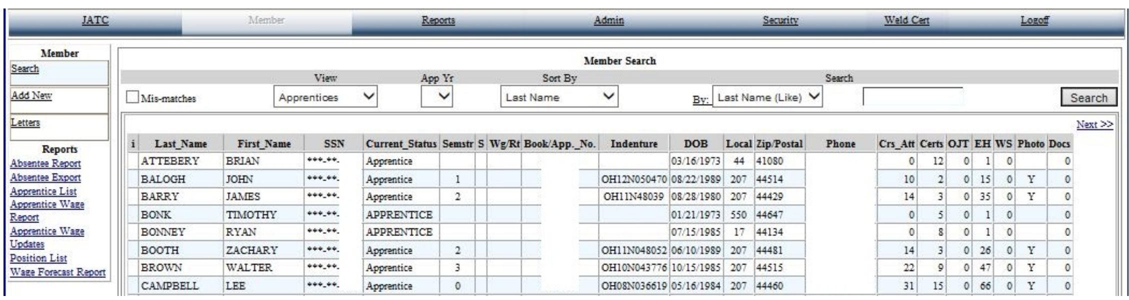
Member

The member area is where you will find basic information about all members that have been added to the ATS. You can search through your members, add new members to your system, create letters to be mailed, and view standard reports that have been built into the system. Note that the links displayed on the left side navigation for an apprentice may not be available when you view a journeyman or an applicant.

Search

Searching for a member or a group of members is an important part of this system. The default view displays members' current statuses. However, under the label 'View' you can access a drop down box that lists all the different classes or statuses that a member can have in the ATS system. The class options are:

1. All
2. All Not Deleted (includes every status except deleted)
3. Applicants
4. Apprentices
5. Declined
6. Deleted
7. Honorary
8. Journeyman
9. Lifetime
10. Probationary
11. Trainee



i	Last_Name	First_Name	SSN	Current_Status	Semstr	S	Wg/Rt	Book/App._No.	Indenture	DOB	Local	Zip/Postal	Phone	Crs_Att	Certs	OJT	EH	WS	Photo	Docs
	ATTEBERY	BRIAN	***-**-	Apprentice						03/16/1973	44	41080		0	12	0	1	0		0
	BALOGH	JOHN	***-**-	Apprentice	1				OH12N050470	08/22/1989	207	44514		10	2	0	15	0	Y	0
	BARRY	JAMES	***-**-	Apprentice	2				OH11N48039	08/28/1980	207	44429		14	3	0	35	0	Y	0
	BONK	TIMOTHY	***-**-	APPRENTICE						01/21/1973	550	44647		0	5	0	1	0		0
	BONNEY	RYAN	***-**-	APPRENTICE						07/15/1985	17	44134		0	8	0	1	0		0
	BOOTH	ZACHARY	***-**-	Apprentice	2				OH11N048052	06/10/1989	207	44481		14	3	0	26	0	Y	0
	BROWN	WALTER	***-**-	Apprentice	3				OH10N043776	10/15/1985	207	44515		22	9	0	47	0	Y	0
	CAMPBELL	LEE	***-**-	Apprentice	0				OH08N036619	05/16/1984	207	44460		31	15	0	66	0	Y	0

Choosing any of these options will filter all of the members who have that status in your ATS system. This is an easy way to find all the members having a particular status.

To the right of the 'View' area you will see the 'Appr Year' option. This option will allow you to search for all members who are in a particular year of the apprenticeship program. The number of years listed in this drop down box will be based on the number of years you specified your program lasted under the 'JATC' tab on the top menu and 'Training Program Info' on the left side options. This search will only function if you have assigned a year for each and every apprentice by opening each member record and choosing the year in the demographic area. Be sure to save your changes.

To the right of the 'Appr Year' option you will see the 'Sort By' option. 'Sort By' will allow you to sort the member list by Last Name, First Name, SSN, Current Status, Book Number, Indenture, or Date of Birth, Local, and Zip.

Finally, if you know the name of a particular member that you are looking for you can enter the last name in the text box to the far right. Clicking the 'search' button will search through the members in your ATS and list alphabetically members that come after the item you are searching in groups of fifty. In this way, if you were interested in finding everyone in the ATS whose last name started with the letter 'M', you would type an 'M' in the search box and click on the 'search' button. The ATS would then not only provide you with a list of all names starting with the letter 'M', it would also list the names that followed alphabetically, (e.q. 'N', 'O',….) up to the 50 per page limit.

Last name is listed as the default, but you can also search by first name, SSN, DOB, Member Number, Indenture, Province, State, Zip/Postal Code or local.

At times you might search for a group of members. Let's say you were searching for all members whose last name are 'Smith'. You would type 'Smith' in the search box and click on the 'Search' button. The ATS would then provide you with a list of members whose last name are 'Smith'. If you were to click on one of the members in the list, that member's profile information would open for you to make changes to his record. Clicking the 'Search' button on the top left will take you back to the member's list and the ATS will still show the results of your previous search.

Add New

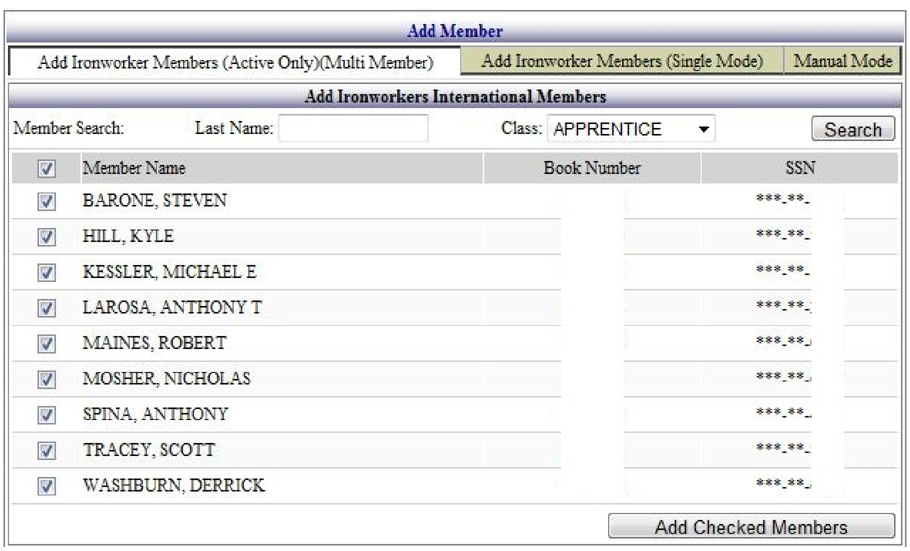
Adding new records to the ATS is an important process that you will need to perform from time to time. To add new members to your ATS:

1. Navigate to the 'Member' tab located on the top menu
2. Locate the 'Add New' option on the left menu and single click. Note: There is an image of the 'Add New' option in the previous section.

There are three methods for entering members into this system. The 'Single' and 'Multi' member modes will allow you to select members from the International's database using a variety of options. The 'Manual' mode will require information to be typed in order to add the record.

Member Mode Definitions	
Multi-Member Mode (default)	To add multiple active members in the following classes: Probationary, Apprentice, or Journeyman from the Internationals database as a group.
Single Member Mode	To add one member's record at a time having any type of status and any type of class from any local in the union.
Manual Mode	To enter an applicant's information

Multi Member Add New



The 'Multi Member' mode is the default view and is used to add multiple members all at once. **Multi member will only show members who have not yet been added to your system or members that have been reinstated.** To initially build your apprentice database, you will want to use the 'Multi

Member' mode. This option will allow you to load all **ACTIVE** members in your local as a group in the following classes:

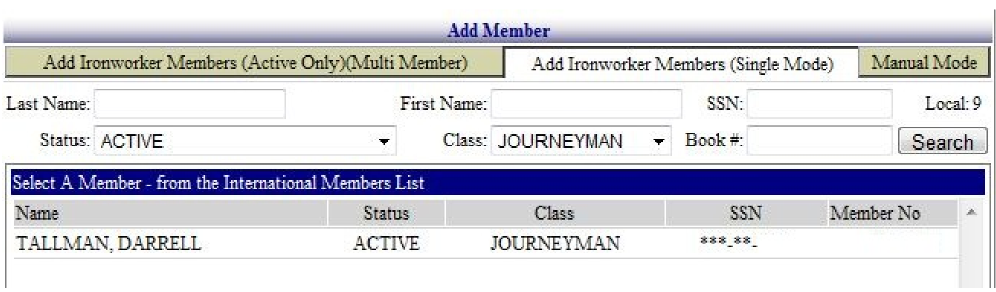
1. Probationary
2. Apprentice
3. Journeyman
4. Trainee

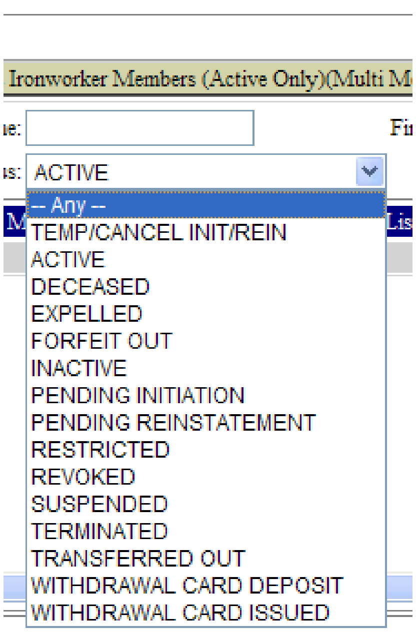
The 'multi member' area will display all members within the class that you select from the drop down box that are NOT already in your ATS database or who have reinstated. It will be good for you to check this feature from time to time for new members processed by the International.

The records will be added with current demographic information including address, date of birth, and phone number from the IW's master computer records.

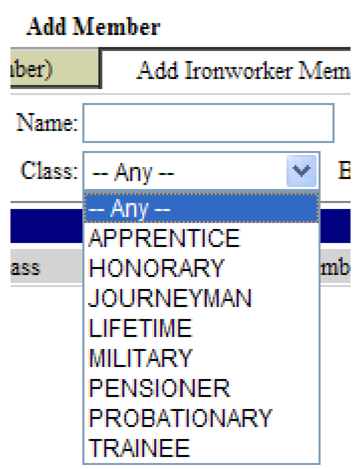
1. Click the 'Member' tab.
2. From the left side navigation, click 'Add New'.
3. Choose the appropriate 'Class' for the types of members you are looking for.
4. Click the boxes next to the members' names that you want to add. Note: All boxes are checked by default. Uncheck boxes that you do not wish to add at this time.
5. Click the 'Add Checked Members' button located at the bottom of the list.

Single Member Add New





The 'Single Member' mode allows you to search for any member with any status belonging to any local. For instance, this will allow you to add a member with a Probationary class to your tracking system and add information to his record. **All of your members will be displayed in the 'Single Member' mode regardless of whether you have already added them to your system or not**. In 'Single Member' mode you are able to add one member at a time. This is where you will go to *add a member from a local other than your home local* or a

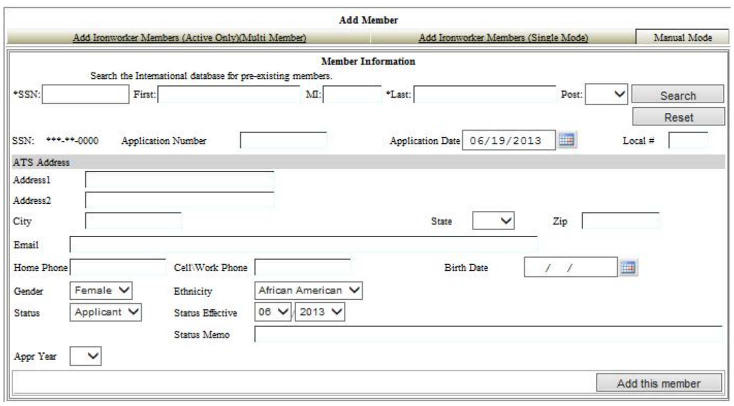


traveler as you might call them. You will need the members SSN/SIN or book number to add travelers.

1. Select the 'Status' of the member that you are searching for.
2. Select the 'Class' of the member that you are searching for. Note: If you are unsure of the status or the class of the member, select 'Any' for both the status and the class. In doing this, you will be searching all members regardless of 'Status' or 'Class' with the member number or SSN that you enter.
3. Enter either the 'Last Name' or 'First Name' into the search box. Note: Enter 'SSN' or the 'Book #' into the search box to find members from another local.
4. Click on 'Search' to locate that member in the system.
5. Clicking on that member will add him to your system allowing you to place him into classes.

You will be able to view a traveler's history but you will be unable to edit any of his previous information. You will only have control of the classes and certifications that you put him in.

Manual Add New



If you choose to use the Apprenticeship Tracking System to keep track of 'applicants' then you will need to manually key those applicants into the 'Manual' mode area. This system will not allow you to add a member into the system if he already exists in the union. The system will search the International database for the SSN that you enter. You will be notified if that SSN already exists in the system. This is how you will know if someone is trying to join your local when that person already belonged to another local in the past. To add an applicant to the system:

1. You will be required to enter in the 'SSN' and the 'Last Name'.
2. Click on the 'Search' button. The system will search all members to find a match of the SSN or the last name. If there is no match of the SSN then you can continue to add in the applicant.
3. Fill in the rest of the information and click on 'Add This Member'.
4. Repeat these steps for each additional applicant that you would like to add.

Letters

The ATS includes letters that are written using standard language that will cover most of your notification requests. It is possible to customize the letters with some of your own words if you prefer. You also have the ability to create new letters and add them to the system. You can populate letters with a member's contact information along with a list of other useful information. If you choose not to use the letters portion of the system, you can export the information to excel allowing you to use Microsoft Word and mail merge to create letters, and labels in any way that you choose.

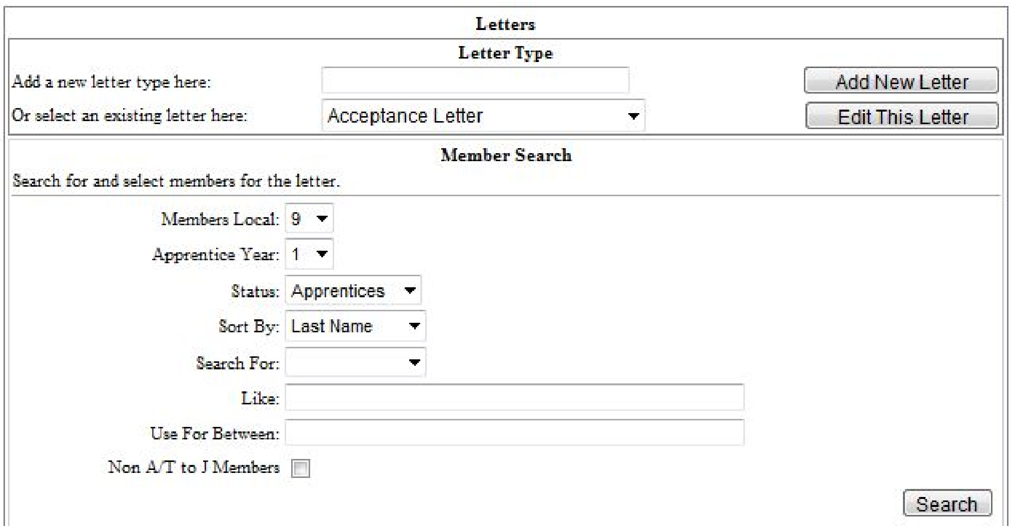
Types of letters available

There are many available letters that can be printed from the Online Apprenticeship Tracking System. The following is a descriptive list of the letters available and recommendations for how to use them:

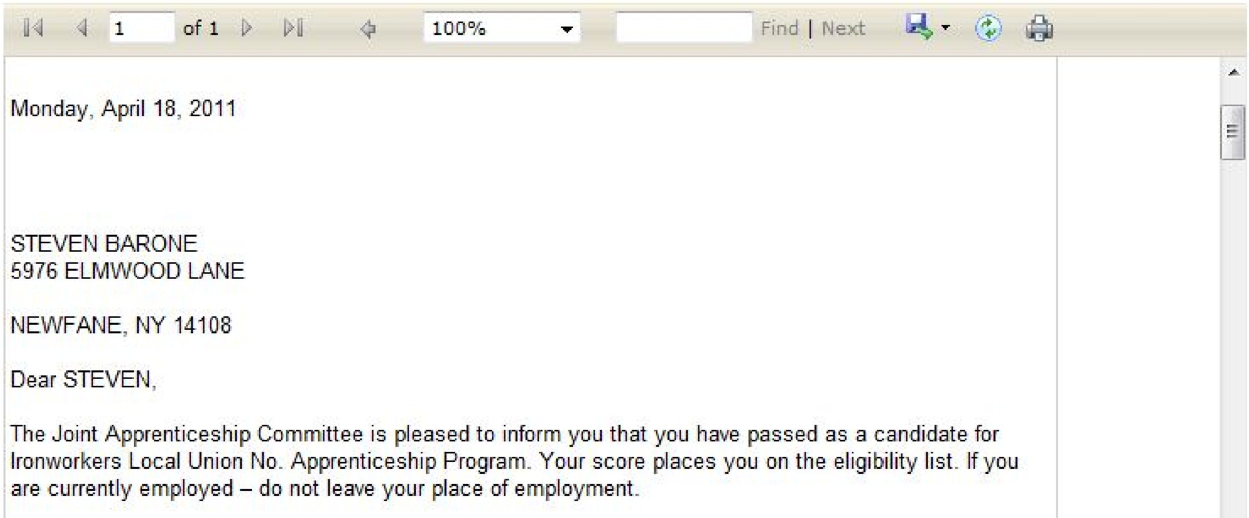
1. **Absentee Letter** – Send this letter to an apprentice when he or she has missed a class.
2. **Acceptance Letter** – Send this letter to an applicant who has been accepted into the apprentice program.
3. **Appearance Before JAC Letter** – Send this letter to notify an individual that they need to attend the next JATC/TIC meeting.
4. **Applicant to Union Hall** – Send this letter to notify an applicant to meet the business manager at the union hall.
5. **Apprentice Set Back Letter** – Use this letter when an apprentice has missed classes and will not advance to the next step in the apprenticeship program.
6. **Apprenticeship Info Letter** – Use this letter as a basic flyer about the apprenticeship program.
7. **Apprentice Wage Increase Letter** – Send this letter to notify an apprentice regarding a wage increase.
8. **Aptitude Test Letter** – Send this letter to notify an applicant that an aptitude test has been scheduled.
9. **Business Manager Letter** – Send this letter to the business manager when a new apprentice starts the program.
10. **Citation Letter** – Send this letter to notify an apprentice that they have missed more than the allowable amount of classes and they are suspended by the JATC.
11. **Drug Testing Letter** – Send this letter to notify an applicant to take a drug test and physical.
12. **Employer Wage Increase Letter** – Send this letter to notify an employer regarding a wage increase.
13. **Indenture Letter** – Send this letter to notify the new apprentice is indentured into the program.
14. **Interview Letter** – Send this letter to schedule the oral interview.
15. **Notice of Action Letter** – use this letter to record action taken at a JATC/TIC meeting.
16. **Orientation Letter** – Send this letter to notify the applicant to attend the apprenticeship orientation.
17. **Reference Letter** – Send this letter to the applicant's references.
18. **Rejection Letter** – se this letter to notify an applicant that he or she has not been accepted into the program.

Print and send a letter to one or multiple members

1. Navigate to the 'Member' tab using the tip menu.
2. Locate and click the 'Letters' option on the left side menu.



3. Under the 'Member Search' heading make choices from the status drop down boxes to narrow down the type of members that you want to send a letter to. In my example, I have chosen to send a letter to all 1st year apprentices and sort the list by their last name.
   NOTE: You have the ability to send letters to members from other locals if you have added in travelers to your system. All local numbers for members in your system are listed in the 'Members Local' drop down box shown in the image above.
4. Click the 'Search' button to show a list of the types of members that you chose to view.
5. Check the boxes next to the member's names for whom you would like to send a letter. You can check all names at once by selecting the check box at the top.
6. Now that you have checked those members for which you want to send a letter, you must select a letter from the drop down box at the top of the screen. In my example, I have chosen the 'Acceptance Letter'.
7. Click 'Populate Letters' to begin the process of merging the data into the letter.
8. A new window will display the contents of the letter for you to review. Note: Be careful not to delete or change any area that has a # symbol. The #'s mark a special area used by the tracking system to pull the name and addresses from the applicant or apprentice record. Adding and removing these fields to your letter is addressed later in this section.
9. Click 'Print Preview' to merge the data of the members that you chose into the letter.

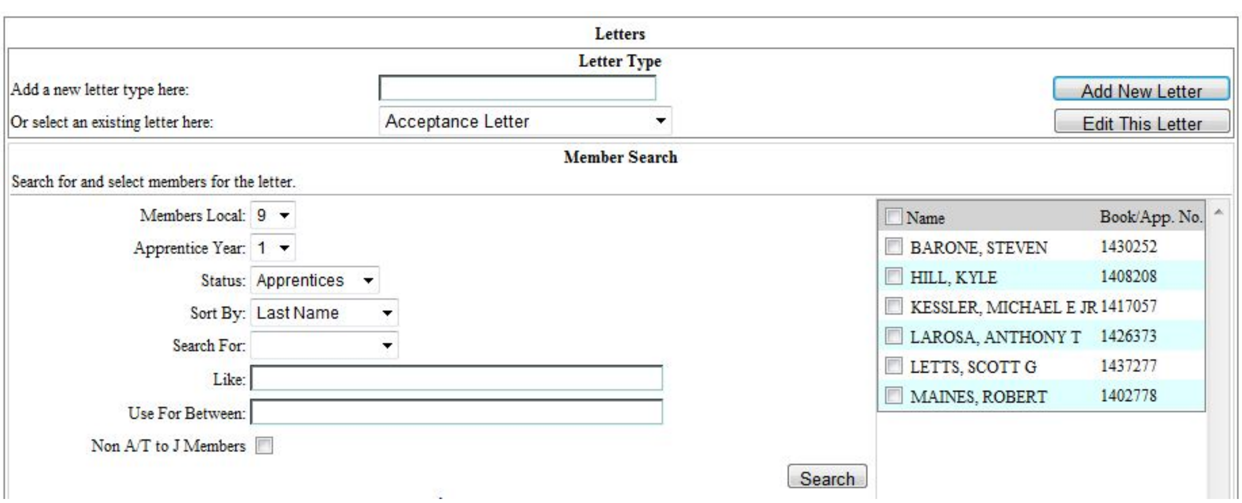


10. The data is now merged with the letter as you can see above. You can now print all of these letters or export these letters to Excel, PDF, or Word by using the options in the top right side of the screen. Use the scroll bar to the right to scroll down through the merged letters.

Export member information for printing mailing labels

You have the ability to export all of the demographic information for any member or group of members that you choose. This will give you the ability to easily create mailing labels and custom letters if you choose not to use the built in letters function.

1. Navigate to the 'Member' tab using the top menu.
2. Click the option for 'Letters' on the menu to the left.
3. Under the 'Member Search' heading, you will need to make some choices as to which members you want to export. In my example, I want to export information for all 1st year apprentices and I want them listed in alphabetical order by last name. Once you have made your choices, click the



'Search' button.

4. You should now see a list of members for which you can choose from. Check the boxes next to the names of the members for whom you want to export. If you want to export all of the

members on this list, click on the check box next to ‘Name’ at the top left. This will check all boxes for you.

5. Click ‘Create Member Export File’ and the button will then turn into a link. Click the link to preview the information that you are about to export to Microsoft Excel.

1 of 1 100% Find | Next

Book	last Name	first Name	middle Name	post Name	home Phone	work Phone	address1	address2
	KESSLER	MICHAEL	E	JR			7078 RIDGE RD	
	LAROSA	ANTHONY	T				740 MOHAWK ST	
	MAINES	ROBERT					543 59TH ST	
	SPINA	ANTHONY						
	BARONE	STEVEN					5976 ELMWOOD LANE	

5

6. You should now see all the information about every member for whom you checked a box in the previous step.
7. Use the icon at the top right to export the information. You will have the ability to export the information to Excel, PDF, or Word. Choose Excel if you are using this data to merge into an existing letter or to create mailing labels.
8. You will be prompted for a location where you would like to save the information that you are exporting. Now that you have all the information saved in an excel document, you are able to use Microsoft Word to create a mail merge to provide you with labels, custom letters, and any other type of document you would like.

Note: This tutorial is not meant to teach you how to use Microsoft Office products. If you are unsure about how to create a mail merge using Microsoft Word then you will need to find an alternative way to learn how to do this.

Add\Edit a new letter

1. Navigate to the ‘Member’ tab using the top menu.
2. Click the ‘Letters’ option on the left side menu.
3. Under the ‘Letter Type’ heading, enter the name of the new letter in the text box.
4. Click the ‘Add New Letter’ button.
5. Your new letter will now be listed along with the existing letters. Click the drop down box and click on your new letter.
6. Click the ‘Edit This Letter’ button.
7. A new window will display the contents of the letter. Be careful not to delete or change any area that has a # symbol. The # symbol indicates a special area used by the tracking system to pull the name and addresses from the member record. You can see additional fields available on the left side of the screen. Any of these fields can be added to your new custom letter. Simply copy the item you would like to include in your letter and paste it in the spot you would like for it to appear.
8. Locate the following statement: [Replace this letter with the text of your letter.]
9. Delete this statement and type in the words for this new letter.

10. Click 'Submit' to save the letter.
11. Click 'Cancel' to return to the previous screen where you can now use this letter to send out to members.

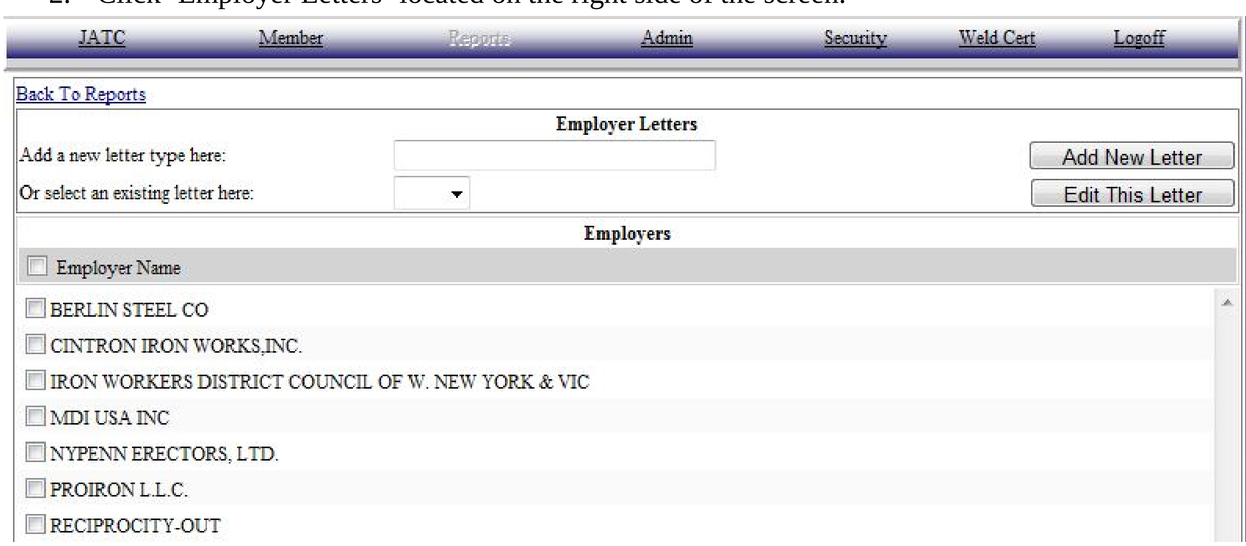
Edit an existing letter

1. Navigate to the 'Member' tab using the top menu.
2. Click the 'Letters' option on the left side menu.
3. Click the drop down box and click on the letter you want to edit.
4. Click the 'Edit This Letter' button.
5. A new window will display the contents of the letter. Be careful not to delete or change any area that has a # symbol. The # symbol indicates a special area used by the tracking system to pull the name and addresses from the member record. You can see additional fields available on the left side of the screen. Any of these fields can be added to your new custom letter. Simply copy the item you would like to include in your letter and paste it in the spot you would like for it to appear.
6. Type in any changes you have for this letter.
7. Click 'Submit' to save the changes.
8. Click 'Cancel' to return to the previous screen where you can now use this letter to send out to members.

Print and send a letter to one or multiple employers

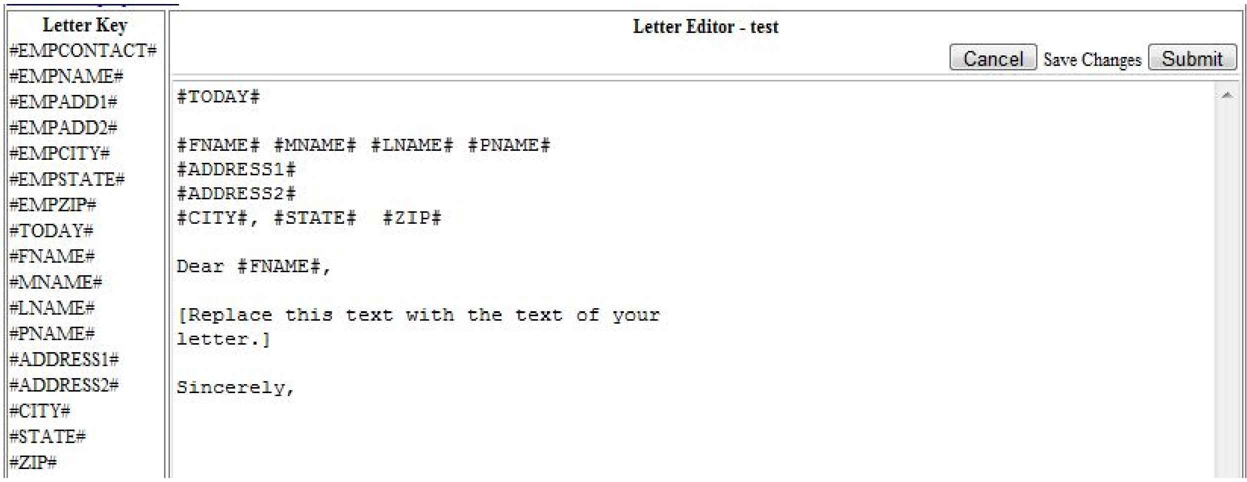
Some JATC's would like the ability to send letters to employers who have been entered into the system. This feature is available to you.

1. Navigate to the 'Report' tab using the top menu.
2. Click 'Employer Letters' located on the right side of the screen.



3. There aren't any custom letters preloaded for you in this area. You will have to create your own letters. Enter a name for your letter in the first text box and click 'Add New Letter'. That name will now appear in the drop down list of letters.
4. Choose the name that you created from the drop down list of letters and click 'Edit This Letter'.

5. A new window will open and you will need to type the body of your letter. Notice the merge fields that are available to you on the left side of the screen. These are fields that you can copy



and paste into your letter. This information will be merged into the letter for you.

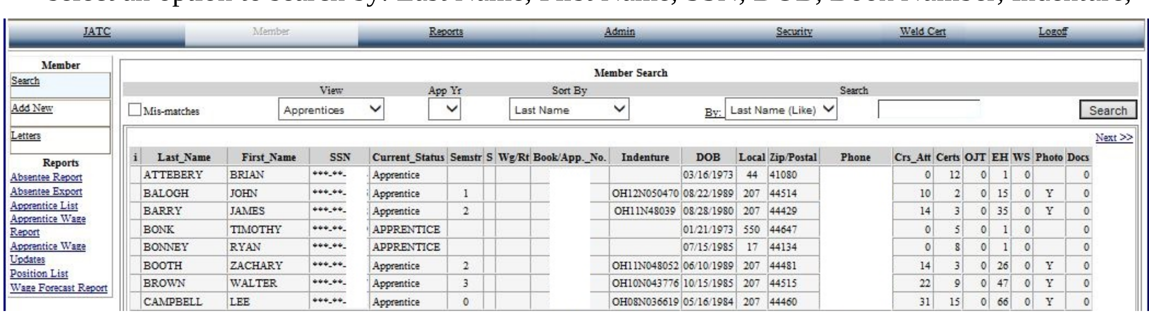
6. Click 'Submit' when you are finished editing your letter. Click 'Cancel' to take your back to the previous screen.
7. You should see a complete list of employers listed for you to pick from. Check the boxes of the employers whom you want to send a letter and choose the letter from the drop down list of letters that you added.
8. Click the 'Populate' button at the bottom of the screen.
9. A new window will open allowing you to review the details of the letter. Click 'Print Preview' to merge the data from the employer records into your letter.

Tracking Information on Ironworker members

For each Ironworker member you can track wage increases, courses, audit logs, certifications, documentation, education, employment history, military history, notes, on the job training, and photos. All of this information is accessed through the 'Member' tab located on the top menu. Note: The links displayed on the left side navigation for an apprentice may not be available when you view a journeyman or an applicant.

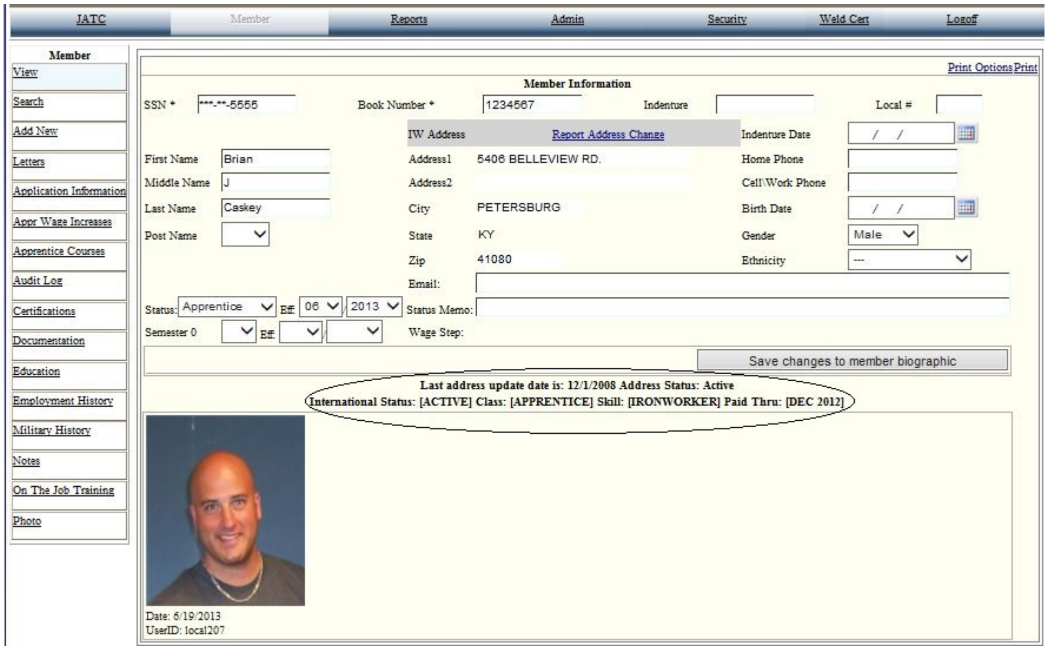
Find and view a member record

1. Navigate to the 'Member' tab using the top menu.
2. Under the 'Member Search' heading, click the drop down arrow under the 'Search' label and select an option to search by: Last Name, First Name, SSN, DOB, Book Number, Indenture,



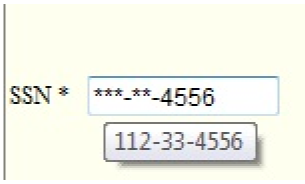
State, Zip, or Local. Note: In the example above, we are only searching the 'Apprentices' in this system. You can change the class of member you are searching for or choose 'All' to search through your entire list of members regardless of class.

3. Enter the members' information into the empty box and click the 'Search' button.
4. Choose the member you are looking for from the list of members.



In the image above you can see what a member record would like like after choosing a member from the list. Pay close attention to the information that is circled above. This information is updated automatically for every member. If the local union makes a change in status, class, skill, last paid date, or address to a members' record in the local union system, those changes will reflect in this area after the local union submits that updated information to the International. In this way you will know when a member becomes suspended, revoked, etc…You are also made aware of the status of the address of this member and the last time that this member's address had changed. The above screen shot shows that this member is an active apprencice. His skill is ironworker and he is paid through December of 2012. His address is active and was last updated on December 1, 2008.

Notice in the screenshot above that the SSN is only showing the last four digits. This is for security purposes. Some of you may have the need to see the entire SSN. Place your mouse pointer over the SSN to display the full SSN. When you remove your mouse pointer, the full SSN will no longer be visible.

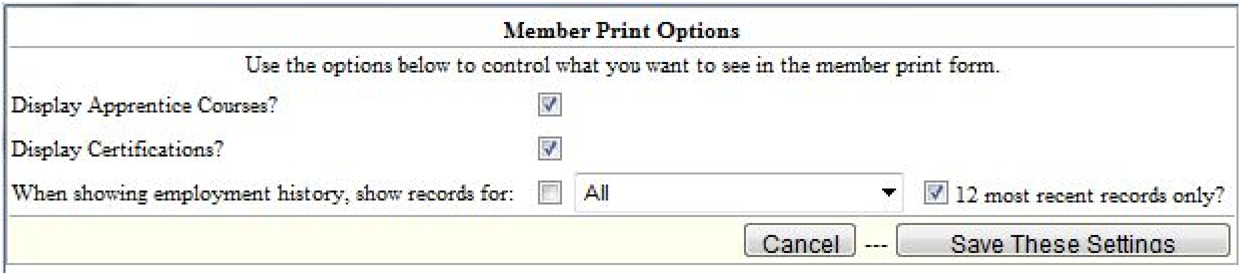


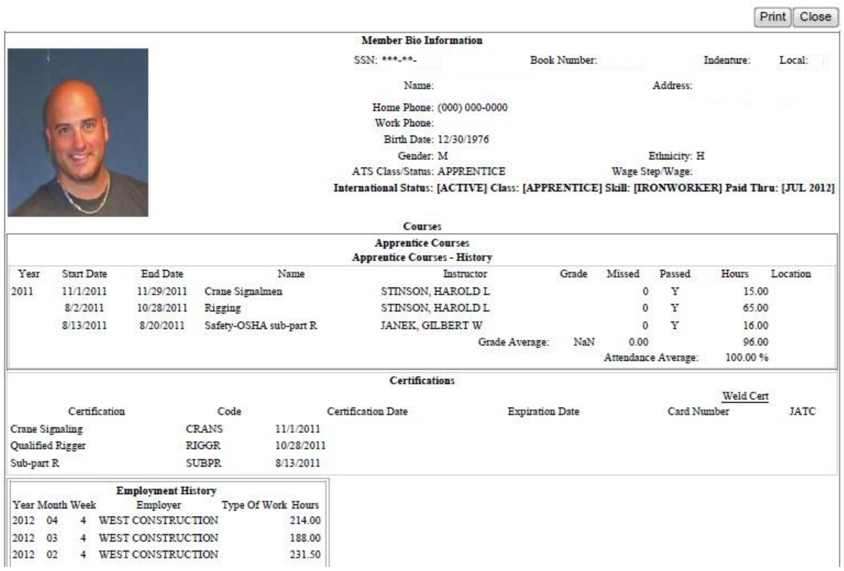
Print a member's transcript

1. Navigate to the 'Member' tab using the top menu.
2. Search for the member for which you would like to view his transcript.
3. Click on that member from the list of members to open up his record.
4. In the upper right corner of the screen you will see a link labeled 'Print Options' and 'Print'. Click on 'Print Options' to select what types of data you would like to see on your transcripts.

You can view courses, certifications, and employment history if you choose to do so. Changing these options will change the information that shows up on your transcripts.

5. Click 'Print' to view that members transcript of all the information you have on that particular member including all demographics, Photo, certifications, and courses.





Print Close

Member Bio Information

SSN: ***-**- Book Number: Indenture: Local:

Name: Address:

Home Phone: (000) 000-0000
Work Phone:
Birth Date: 12/30/1976
Gender: M Ethnicity: H
ATS Class/Status: APPRENTICE Wage Step/Wage:
International Status: [ACTIVE] Class: [APPRENTICE] Skill: [IRONWORKER] Paid Thru: [JUL 2012]

Courses

Apprentice Courses

Apprentice Courses - History

Year	Start Date	End Date	Name	Instructor	Grade	Missed	Passed	Hours	Location
2011	11/1/2011	11/29/2011	Crane Signalmen	STINSON, HAROLD L		0	Y	15.00	
	8/2/2011	10/28/2011	Rigging	STINSON, HAROLD L		0	Y	65.00	
	8/13/2011	8/20/2011	Safety-OSHA sub-part R	JANEK, GILBERT W		0	Y	16.00	
				Grade Average:	NaN	0.00		96.00	
						Attendance Average:		100.00 %	

Certifications

Weld Cert

Certification	Code	Certification Date	Expiration Date	Card Number	JATC
Crane Signaling	CRANS	11/1/2011			
Qualified Rigger	RIGGR	10/28/2011			
Sub-part R	SUBPR	8/13/2011			

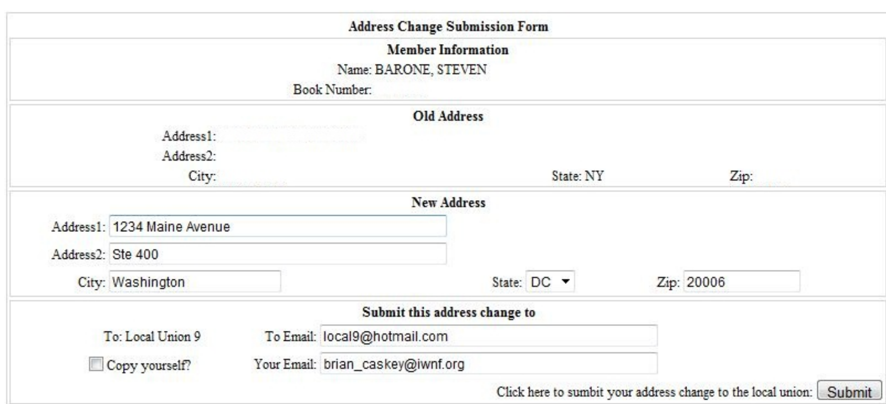
Employment History

Year	Month	Week	Employer	Type Of Work	Hours
2012	04	4	WEST CONSTRUCTION		214.00
2012	03	4	WEST CONSTRUCTION		188.00
2012	02	4	WEST CONSTRUCTION		231.50

6. You can print this transcript if you choose and then close the window by clicking the 'Close' button in the upper right corner of the window.

Reporting an address change

It has become the International's policy that the local union office will be in charge of the address that is on record for any particular member. When an ATS user notices an address that needs to be changed, they must submit that change to the local union. The local union will make that change in the local union system and then submit those changes to the International office. Once those changes are uploaded into the International Headquarters system, the ATS will receive a flag on that record that the



address needs to be synced. Once the address is synced, all offices will have the same address. To report an address change to the local, follow these steps:

1. Navigate to the 'Member' tab using the top menu.
2. Search for the member for which you would like to submit an address change.
3. Click on that member from the list of members to open up his record.
4. Click 'Report Address Change' located above the member's address.
5. Under the 'New Address' heading, type in the new address for this member.
6. Under the 'Submit this address change to' heading, type in the email address of someone at your local union office that can make this change in their LU system.
7. Check the box to the left if you would like to copy yourself on the email that will be sent to the local union office for proof.
8. Click 'Submit' to email this address change to the local union office.

Syncing an address change

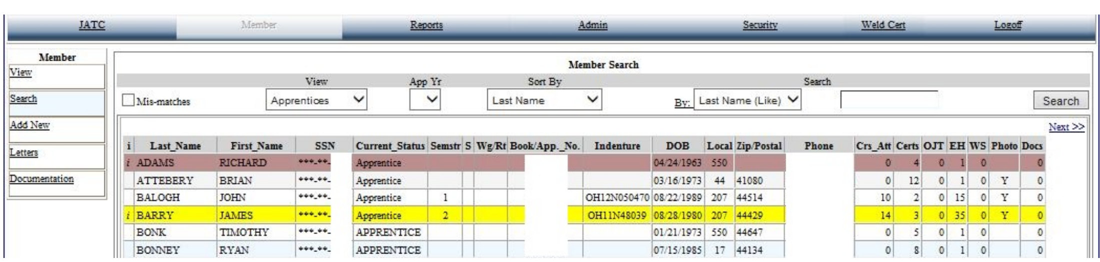
When the International office updates the Headquarters system with the address changes from the Post Office or changes that were sent from the local union office, a 'Sync' link will display in the brown area above the member's address. Clicking the 'Sync' link will update the address that was previously on the ATS system. The ATS system now matches the address at the International. Follow these steps to sync the local union address with your system.

1. Place your cursor over the 'Sync' link in the member record which is displaying the brown area above the member's address. The old address that you previously had in the ATS will be displayed.
2. Click the 'Sync' link to discard the old address and accept the new address.
3. The brown area will go away and your record is now in sync with the local union as well as the International.

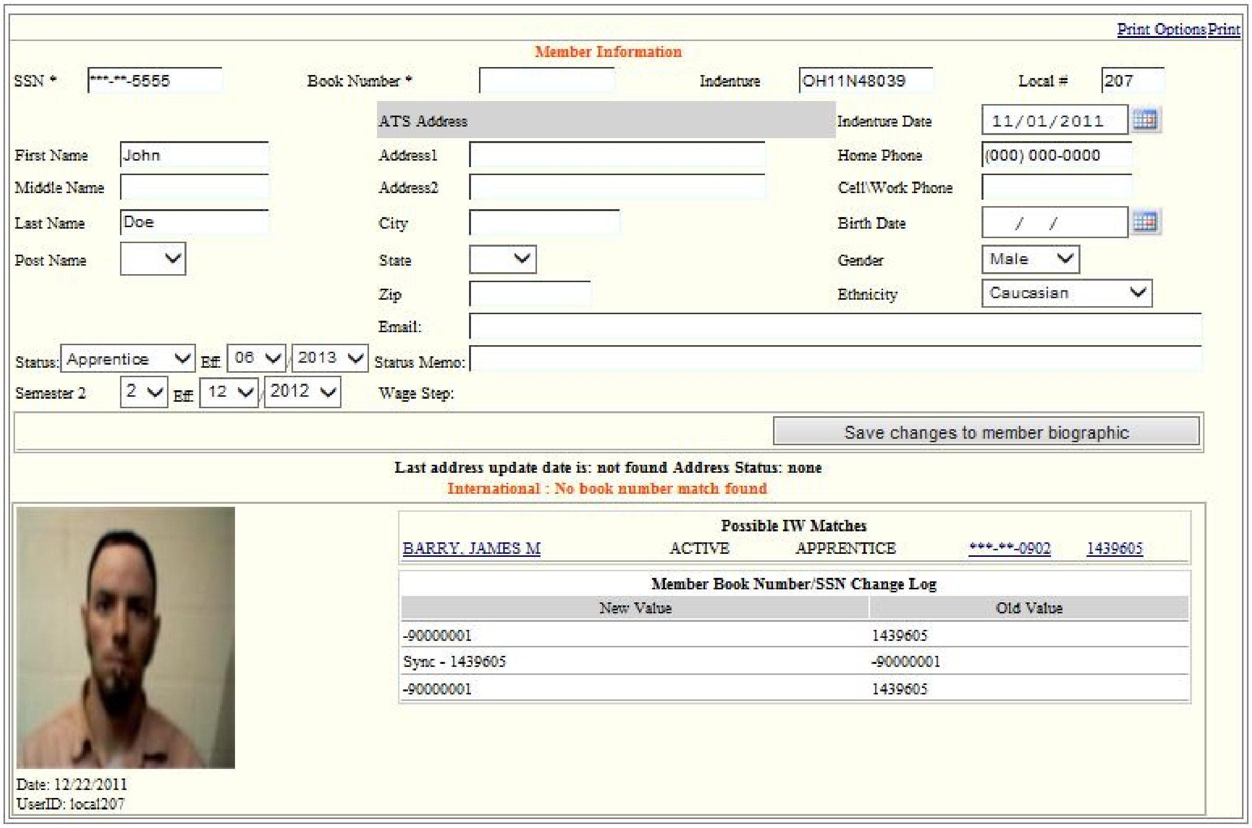
Steps have been added to allow a user to sync multiple address changes at the same time. Click here to read more on that process.

Highlighted members records

You may notice at different times that a member is highlighted brown or yellow as in the example shown here. These brown and yellow lines indicate that there is a discrepancy between your records and the records at the International. Notice the lower case 'i' to the left of the record. Hover your mouse pointer

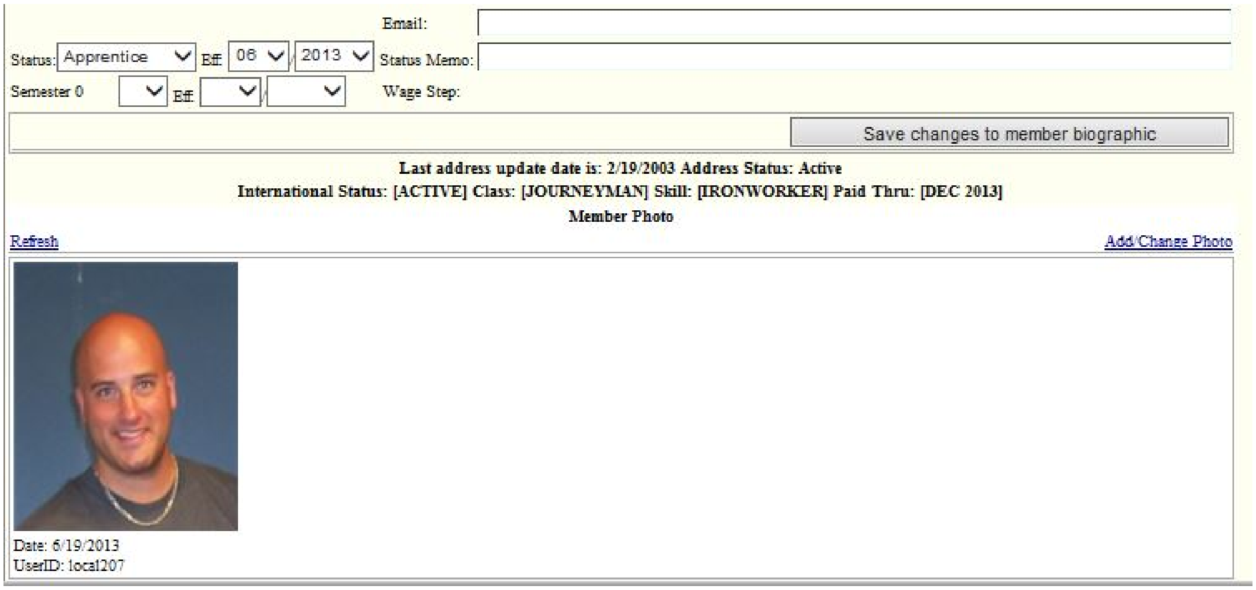


over the 'i' for a short explanation of what is wrong with that record. It is basically a flag that lets you know that you need to take a closer look at this member to see what is going on. If you click on the 'Mismatches' checkbox in the upper left corner, the system will group all members who are highlighted brown together. This will make it easier to find and fix these records. In this example we will look at the yellow line first. When you see a member that is marked with a yellow line, the system is telling you that this member was not found in the Ironworkers Headquarters system at the International. The record was not found because you have information in this system that does not match this member's record at HQ. Click on the member record to get a better idea of the problem.



As you can see in the example here, the system is telling us that it cannot find a matching book number for this member. If you look to the right of the member's photo, the system will suggest possible matches. The match that the ATS found shows a different book number than what is currently in the system. This has most likely occurred because this member went suspended and then returned to receive a new book number. Click on the book number in the 'Possible IW Matches' list and the correct book number will replace the incorrect one. Your records are now in sync for this member and the yellow flag has gone away. Click on the SSN under the 'Possible IW Matches' and the correct SSN will replace the incorrect one. Click on the full name under 'Possible IW Matches' and all demographic information that the International has on this member will replace your information.

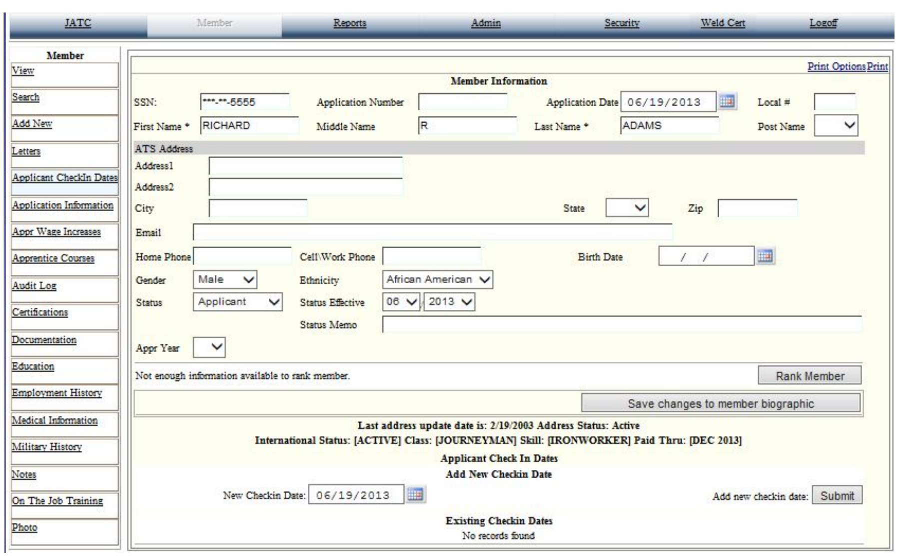
If the flag on the record you are viewing is brown, this indicates that the status of that member has changed. Click on the member record to get a better idea of what the current status is of that member according to the International records. As you can see in the example, this member is listed as an 'Apprentice' and the International records have marked this member as being a 'Journeyman'. Change



the status of this member to match the International records and the brown flag on this member's record will go away.

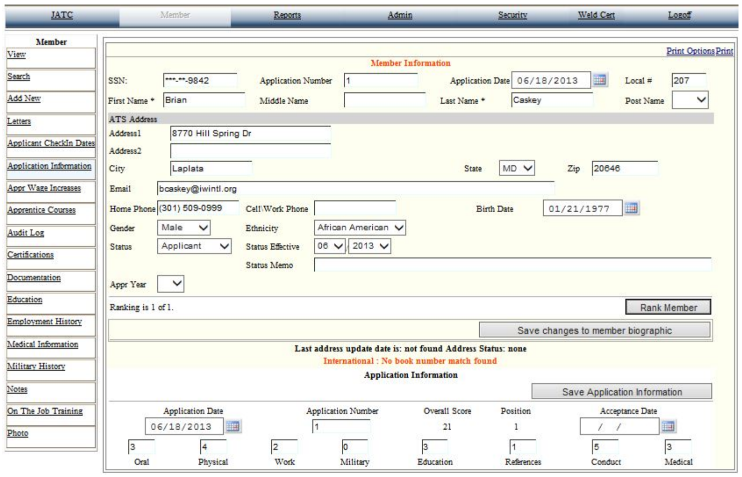
Applicant check in dates

You will only see the option for adding an applicant check in date when viewing an applicant's record. This date is meant to keep track of and remind you of the dates that you asked that applicant to check back with you.



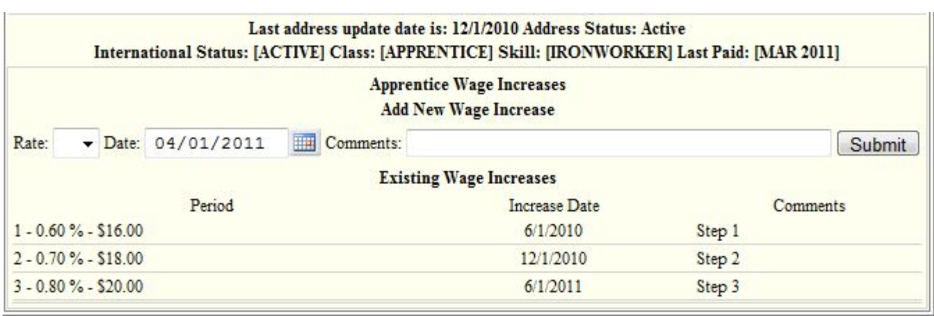
Application information

Application information is used when keeping track of applicants in this system. After entering all applicants into this system using the ‘Add New’ function, you will need a way to rank those applicants in a way that will help you decide which applicants you want to accept into the program. You can give



points to applicants in eight different categories and the system will keep track of which applicants have the most points. Applicants will be ranked from the highest point total to the lowest. Be sure to click ‘Submit’ to save your changes.

Apprentice wage increases



This section of the system gives you the ability to keep track of when an apprentice is due for a wage increase. It will also show when an apprentice started as well as a history of his wages throughout the apprenticeship.

Note: You must have previously entered your wage package data here before you can track the wages of an apprentice.

Add/Delete a wage increase

1. Navigate to ‘Member’ on the top menu.
2. Search for the member for whom you would like to enter a wage increase.
3. From the left navigation menu, click ‘Appr Wage Increases’.
4. Under the ‘Add New Wage Increase’ heading, click the drop down arrow and select the appropriate wage period. Note: You should have already set up a wage term under the ‘Admin’ section of this system.

5. Enter the date when the new wage increase is scheduled to start.
6. Enter any comments about the wage increase.
7. Click 'Submit' to save your changes.
8. If you choose to delete a wage increase, select the period increase that you wish to delete.
9. Click the 'Delete' button to remove the wage increase from that members' record.

Apprentice courses

Although the name implies that this section is only for apprentices, it can be used to track courses taken by any member whether that member is of apprentice, journeyman, or has a probationary status. This includes journeyman upgrade courses. Any courses that your members have taken in the past will be listed here as well as any courses that your members will be taking in the future provided that you have created the class already in the 'Admin' area of the system.

Apprentice Courses

Add A Class To This Member

Apprentice Courses - History

Items below listed in red are your assignments.

Year	Start Date	End Date	Name	Instructor	Grade	Missed	Passed	Hours	Location
2013	3/18/2013	3/22/2013	Structural steel erection 1	MOORE, RAYMOND V	89	0	Y	40.00	
2012	1/7/2013	1/11/2013	Welding 2	SARGENT, MATTHEW J	77	0	Y	40.00	
	12/10/2012	12/14/2012	Pre-engineered metal buildings	SARGENT, MATTHEW J	79	1	Y	32.00	
	11/5/2012	11/9/2012	Blueprint reading	SARGENT, MATTHEW J	85	0	Y	40.00	
	10/22/2011	10/22/2011	Orientation	SARGENT, MATTHEW J	P	0	Y	8.00	

Audit log

The 'Audit Log' tracks the date when a members' status, semester, wage step or local has changed. When an apprentice becomes a journeyman, your local union will notify the International of this change. The International will process this change of status and will apply the change to the International membership system. Once the change is made in the membership system, your system will flag that apprentice so that you will know there has been a change in status. You will need to then change the status in your system to match that of the International. The 'Audit Log' will keep track of the date and time when all changes have been made.

Last address update date is: 11/3/2010 Address Status: Active
International Status: [ACTIVE] Class: [APPRENTICE] Skill: [IRONWORKER] Paid Thru: [OCT 2013]
Audit Log

Status Promotion Log

Promoted To	Effective Date	Update Date	Memo
Journeyman	6/1/2013	6/26/2013	
Apprentice		1/26/2011	
APPRENTICE		11/11/2010	

Change In Local Log

Added to local	Date Added
	11/11/2010

Semester Log

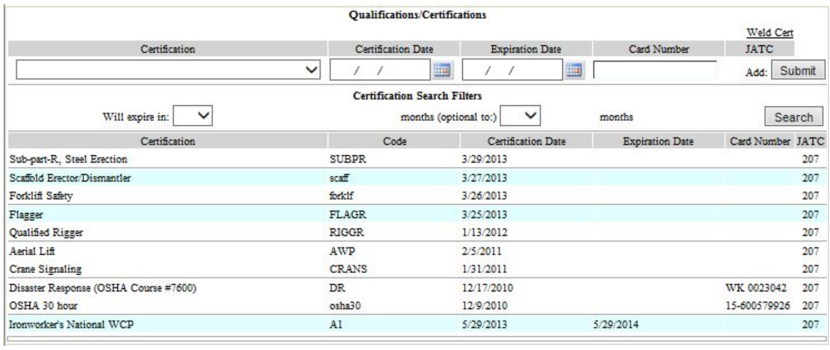
Semester	Effective Date	Update Date
3	4/1/2012	12/20/2012

Wage Step Log

Wage Step	Effective Date
1 - 16.0900	6/26/2010
2 - 18.6600	6/26/2011
3 - 21.6500	6/26/2012
4 - 23.9900	6/26/2013

Certifications

Certifications are much like the 'Apprentice Courses' section. Here is where you will view all certifications that a particular member holds. You will also be able to see when those certifications will expire if they do expire.



Certification	Code	Certification Date	Expiration Date	Card Number	JATC
Sub-part-R, Steel Erection	SUBPR	3/29/2013			207
Scaffold Erector/Dismantler	scaff	3/27/2013			207
Forklift Safety	forklf	3/26/2013			207
Flagger	FLAGR	3/25/2013			207
Qualified Rigger	RIGGR	1/13/2012			207
Aerial Lift	AWP	2/5/2011			207
Crane Signaling	CRANS	1/31/2011			207
Disaster Response (OSHA Course #7600)	DR	12/17/2010		WK 0023042	207
OSHA 30 hour	osha30	12/9/2010		15-600579926	207
Ironworker's National WCP	A1	5/29/2013	5/29/2014		207

Add/Edit/Delete a certification for a single member

1. Navigate to the 'Member' tab located on the top menu.
2. Search for the member for which you would like to add a certification.
3. From the list of members found, click on the member that you would like to add a certification for.
4. Select 'Certifications' from the options on the left side.
5. Under the 'Certifications' heading, click the drop down arrow to select a certification from the list. Note: If the certification is not listed, you will need to add the new certification in the 'Admin' section of the program. **You will not be able to add a certification to a member's record using these steps if you are using this system to print National Fund cards for that certification.** There is a separate process for adding those certifications to a members' record.
6. Enter a start date and an expiration date. You may leave the expiration date field empty if the certification does not expire.
7. A 'Card Number' field is optional if there is a number for each card that needs to be recorded (Federal OSHA 10 cards).
8. Click 'Submit' to add the certification to the member record.
9. Clicking on a certification will give you the option to delete that certification. Click 'Delete' to remove the certification or 'Save' to save any changes that you may having done.

View accredited welding records

If a member has received a welding certification through an AWS accredited welding facility, that certification is automatically added to that member's record. If you notice that one of your members does have welding certifications on his record, you have the ability to view the details of that welding certification by clicking the 'Weld Cert' link located on the 'Certifications' option on the left side menu. The ATS will let you into the WCP system in a 'Read Only' mode for viewing the details.

Certifications

Weld Cert

Certification	Certification Date	Expiration Date	Card Number	JATC
	/ /	/ /		Add: Submit

Certification Search Filters

Will expire in: months (optional to:) months Search

Certification	Code	Certification Date	Expiration Date	Card Number	JATC
Crane Signaling	CRANS	2/1/1992			9
Qualified Rigger	RIGGR	2/1/1992			9
Ironworker's National WCP	A1	7/21/2011	7/21/2012		9
Ironworker's National WCP	B1a	7/21/2011	7/21/2012		9
Ironworker's National WCP	A1	7/21/2010	7/21/2011		9
Ironworker's National WCP	B1a	7/21/2010	7/21/2011		9

Certifications for welder Albert Lewis Jr.

Edit welder information List test results

Name	Created	Effective	Expires			
A1	August 24, 2010	July 21, 2010	July 21, 2011	continuity	renew	X
B1a	August 24, 2010	July 21, 2010	July 21, 2011	continuity	renew	X

Add a certification without entering test results

Documentation

Maintaining important documentation that is accessible along with other membership information such as certifications is more important than ever. The ATS can store all types of documentation from the time an individual applies to become an applicant and throughout the individual's career as a journeyman. You need to have the ability to scan the documentation or you must have received it in a digitized format such as a PDF, JPEG, Bitmap, or any of the other allowable file types.

Last address update date is: 12/1/2010 Address Status: Active
International Status: [ACTIVE] Class: [APPRENTICE] Skill: [IRONWORKER] Last Paid: [MAR 2011]

Members Docs

Refresh Click here to import a new doc

No records found

Add/Delete/View documentation on a member's record

1. Navigate to the 'Member' tab on the top menu.
2. Locate the member for which you would like to add documentation.
3. After clicking on that member, choose the 'Documentation' option on the left side menu.
4. Under the 'Member Docs' heading click 'Click here to import a new doc'.

Member Information

Name: BROWN, WALTER E Book Number: 1428847
Class: Journeyman IW Status: A

Document Type:

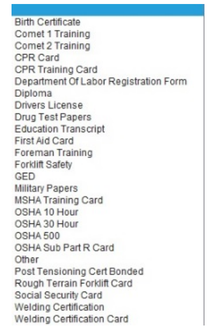
New Document Type: Click here to add a new document type.

Select a file.

Browse...

Upload: Click here to upload a document. When checked, you will replace the current document. When un-checked, you will create a duplicate document.

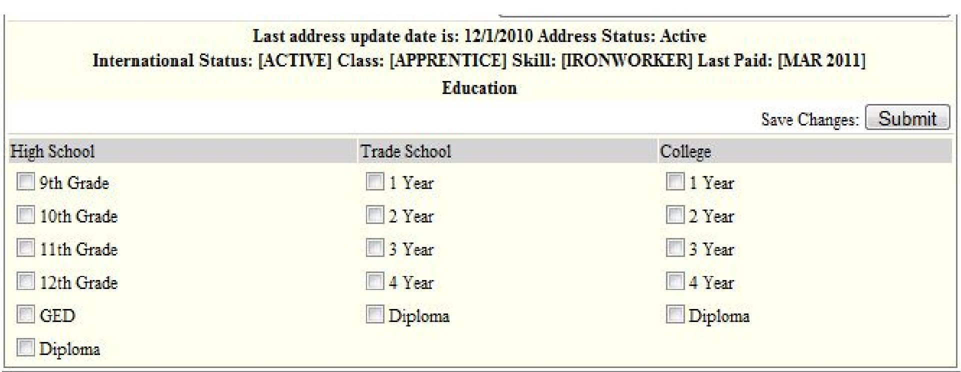
5. A new window will open.
6. Click the 'File Type' drop down arrow to select the type of file you are uploading. Note: If the file type you are looking for is not on the list, enter the name of the type of document you would like to add to the list in the 'New File Type' section and click 'Submit' to add that new type to the list. Some examples of documentation that you may want to add are shown here.



7. Click 'Browse' to locate the file on your computer that you are uploading into the system.
8. Once you have located the file, click 'Click here to upload a document'. Once you have received notification that the file was uploaded, you can close the window by clicking the 'X' in the upper right corner.
9. You will not see your uploaded images until you refresh the page. You can do this by clicking on the 'Refresh' link to the left of the page.
10. Click on the documents title to view its contents. Note: Those of you who are using Adobe Acrobat 9 or later may want to apply the settings listed below. If you do not apply these settings, you will be forced to save a PDF document to your local computer every time you try to open up a PDF.
    a. Open Adobe Acrobat 9.X on the client workstation
    b. Click on the 'Edit' drop down menu
    c. Select the 'Preferences' option
    d. Select the 'Internet' option in the left pane
    e. Uncheck the option 'Display PDF in Browser'
    f. Click the 'Ok' button to close the dialog box
11. Click on the check box located next to the document to be deleted.
12. Click 'Submit' to delete the checked documents from the system.

Education

A members' educational background is entered here. It includes information on the level of education achieved including high school, technical school, and college. Check the boxes next to the level of education that the member has completed.

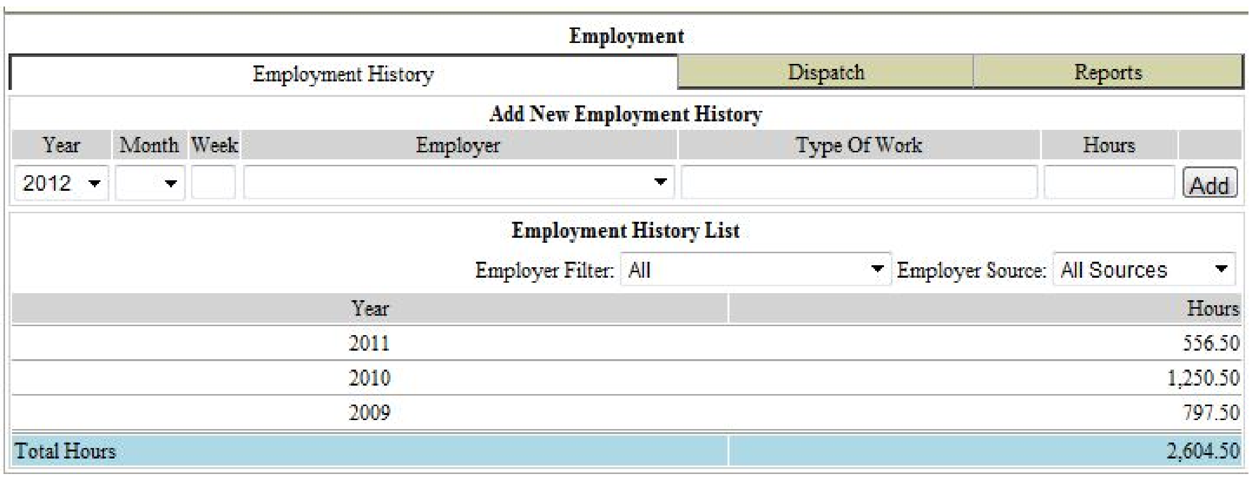


Employment history

This section can be used to record the employment history of an apprentice or journeyman. Apprentice history is stored in the 'On the Job Training' section, so some JATC's may elect to not store any apprentice information here. This section also allows you to track when your members are dispatched out and where they are dispatched to. This history may be loaded automatically from your Trust Fund and kept up to date by receiving monthly data files from your Trust Fund to the International.

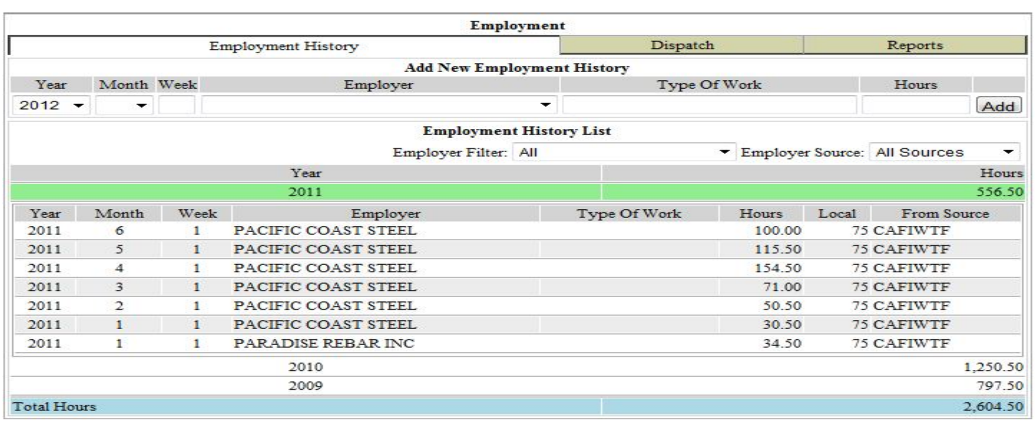
Add/Delete employment history

1. Navigate to the 'Member' tab located on the top menu.
2. Find a member's record using the 'Search' field.
3. From the list of members found, click on the member for which you would like to apply employment history.
4. From the left side options, choose 'Employment History'.
5. Any 'Employment History' for this member will display under the 'Employment History List' heading. As you can see below, the total number of hours for each year is displayed. Select a year to filter down and show the employers and hours that member worked for that year.



Year	Hours
2011	556.50
2010	1,250.50
2009	797.50
Total Hours	2,604.50

6. In this example, I have chosen to view the employment history for the year 2011. Notice the hours shown for each employer as well as the 'Total Hours' listed below. Only one year can be selected at a time. Select another year to view the hours for that year.



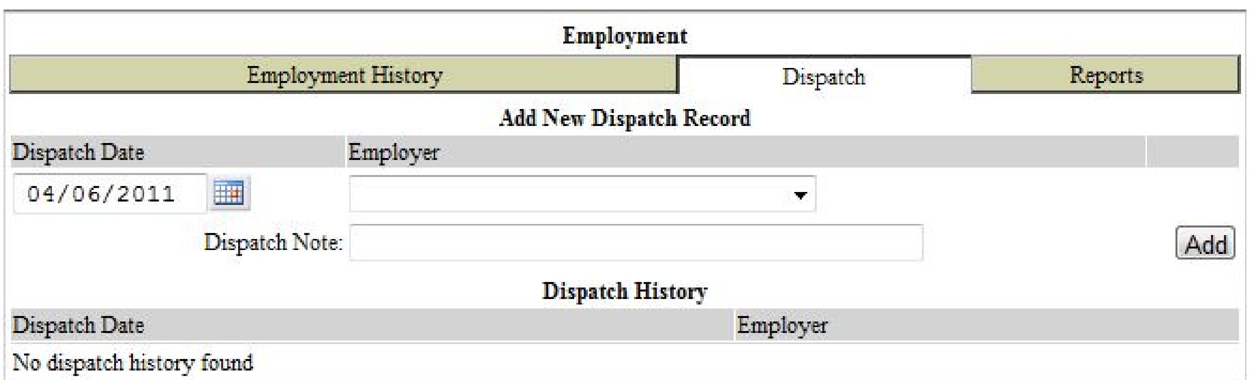
Year	Month	Week	Employer	Type Of Work	Hours	Local	From Source
2011	6	1	PACIFIC COAST STEEL		100.00	75	CAFIWTF
2011	5	1	PACIFIC COAST STEEL		115.50	75	CAFIWTF
2011	4	1	PACIFIC COAST STEEL		154.50	75	CAFIWTF
2011	3	1	PACIFIC COAST STEEL		71.00	75	CAFIWTF
2011	2	1	PACIFIC COAST STEEL		50.50	75	CAFIWTF
2011	1	1	PACIFIC COAST STEEL		30.50	75	CAFIWTF
2011	1	1	PARADISE REBAR INC		34.50	75	CAFIWTF

Year	Hours
2010	1,250.50
2009	797.50
Total Hours	2,604.50

7. Notice the heading 'From Source' on the right hand side. This column will give you information on where the data came from. In this example, the data came from the trust fund. You can filter the source using the drop down box 'Employer Source'.

8. Under the 'Add New Employment History' heading, enter the week, month, and year for the time the member worked.
9. Click the 'Employer' drop down arrow to select an employer. Note: This list of employers comes from the 'Employers & Projects' option on the left side navigation under the 'Admin' tab on the top menu.
10. Enter the type of work and the number of hours that member worked.
11. Click 'Add' to add that employment history to that member's record.
12. Click on any item that you have added to make changes. Make your changes to the record and click 'Save' to save your changes. Note: You cannot make changes to or delete employment history that has been added to a record through a trust fund.
13. Click on any item that you want to remove. Click 'Delete' to remove the employment history from that member's record.
14. Notice the drop down box next to 'Employment Source'. 'JATC Records' displays only records that you have entered into the system for these members. Some locals have had the trust fund submit employment history data to the International electronically which has allowed us to import all of this information for you. If you are one of these locals, choosing 'All Sources' from this drop down box will display these records for you.
15. There is an 'Employer Filter' drop down box which gives you the capability of choosing one employer from your complete list of employers. The list will then filter out all of the other employers and just show the hours and dates that member worked for that employer.

Add/Edit/Delete dispatch information

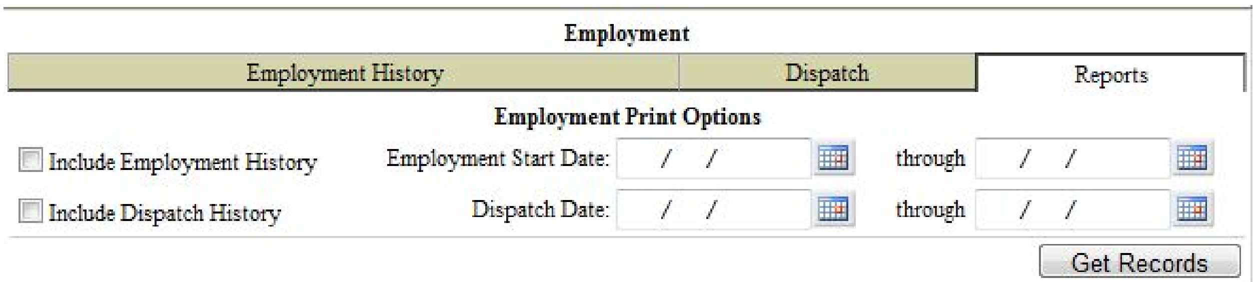


It has been requested that there be a way to track when a member was dispatched out to a job site. To enter dispatch information for a member:

1. Navigate to the 'Member' tab on the top menu.
2. Find the member's record using the 'Search' field.
3. From the list of members found, click on the member for which you would like to add dispatch information.
4. Click the 'Employment History' option from the left side menu.
5. There are three tabs associated with employment history. Click on the middle tab to display 'Dispatch' information.
6. Any previous dispatch information entered will show up under 'Dispatch History'.

7. The 'Dispatch Date' is the day that that member was sent out to work for a particular employer. Select a date and an employer from the drop down box. A dispatch note area is available if you choose to use it.
8. Click the 'Add' button to apply the dispatch information to this member's record.
9. Click on any item that you have added to make changes. Make your changes to the record and click 'Save' to save your changes.
10. Click on any item that you want to remove. Click 'Delete' to remove the dispatch history from that member's record.

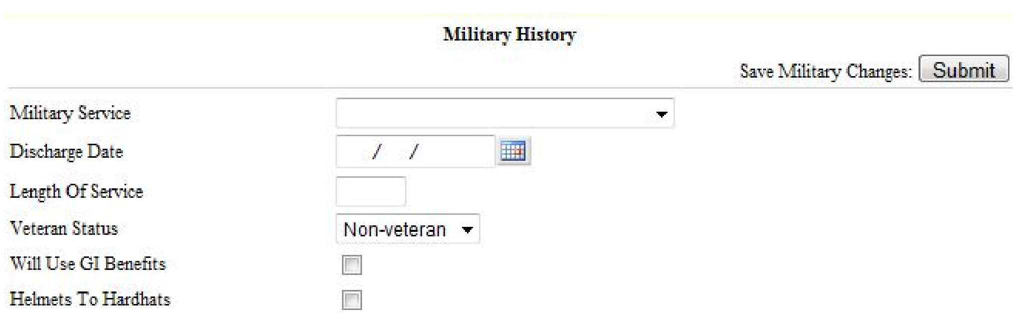
Display and print reports on dispatch information



1. Navigate to the 'Member' tab on the top menu.
2. Find the member's record using the 'Search' field.
3. From the list of members found, click on the member for which you would like to add dispatch information.
4. Click the 'Employment History' option from the left side menu.
5. There are three tabs associated with employment history. Click on the last tab to display and print reports on dispatch information.
6. Check the boxes for the information for which you are looking for. Enter dates if necessary to narrow down your search.
7. Click the 'Get Records' button to display the results.

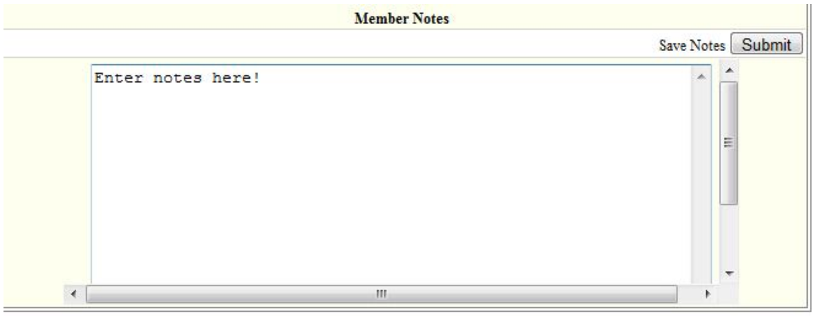
Military history

If a member has a military background, then it can be entered here.



Notes

The 'Notes' section should be used to capture any comments relevant to a members' training. This includes comments on performance including any disciplinary actions taken. Be sure to click the 'Submit' button to save your changes.

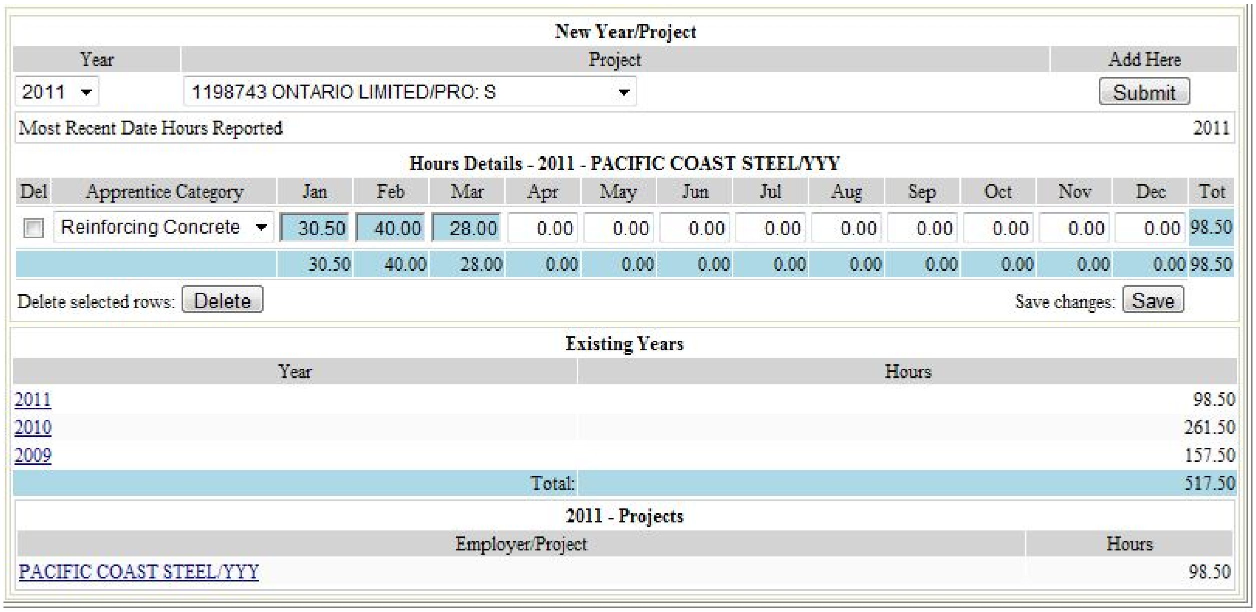


On the job training

Details such as the employer, number of hours worked, and type of field experience are easy to track. Use this section to store training history of an apprentice. You can track the hours worked on a project, as well as categorize the type of work an apprentice has been doing for each project.

Add/Edit/Delete on the job training

1. Navigate to the 'Member' tab on the top menu.
2. Find the member's record using the 'Search' field.
3. From the list of members found, click on the member for which you would like to add dispatch information.
4. Click the 'On The Job Training' option from the left side menu.
5. Under the 'New Year/Project' heading, select the year and project by clicking the drop down arrows.
6. Click the 'Submit' button to begin adding on the job training for that year and project.



7. Under the ‘Hours Details’ heading, click the drop down arrow to select an ‘Apprentice Category’. Note: The list of ‘Apprentice Category’ items can be edited under the ‘Admin’ tab on the top menu.
8. Enter the hours worked in the boxes under the applicable months.
9. Click the ‘Save’ button when you have entered all of that hours for that apprentice category.
10. You can edit this information at any time by changing the number of hours or the apprentice category and then clicking the ‘Save’ button.
11. Check the box to the far left under the ‘Del’ heading to remove an entire row.
12. As you can see in the image above, you can view on the job training history hours by year, by employer/project, and you can also view the type of work and hours worked for each month.

Photo

A photo can be added to a members’ record for identification purposes. If no photo is available, a placeholder will display. The photo that you upload onto a members’ record will also show up on a members’ transcript as well as on any certification cards that you print.

Add/Replace a photo on a member’s record

1. Navigate to the ‘Member’ tab on the top menu.
2. Find the member’s record using the ‘Search’ field.
3. From the list of members found, click on the member for which you would like to add a photo.
4. Click the ‘Photo’ option from the left side menu.
5. Under the ‘Member Photo’ heading, click the ‘Add/Change Photo’ button.
6. A new window will open. Click ‘Browse’ to locate the photo you want to upload.
7. Once you have found the photo for which you want to upload, click the ‘Submit’ button.
8. Once you have received notification that the photo has been uploaded, you can exit the window by clicking the ‘X’ in the upper right corner of the window.
9. You will not see the new picture until you refresh the page. You can do this by clicking the ‘Refresh’ link located above the photo.

Reports

There are currently eighteen different reports that have been included in the Online Apprenticeship Tracking System for you to use. Listed below are the different reports and a brief description of the information that they will provide for you.

Note: Most of these reports allow you to sort the various columns. Click on the up or down arrows next to each heading to sort alphabetically. You also have the capability to export these reports as a PDF or a Microsoft Excel file.

1. **Absentee Report**: The absentee report will return a list of all members who you have recorded to have missed at least one class. The report will return information about the class that he missed along with the notes that were recorded on why the class was missed.
2. **Absentee Export**: The absentee export will return a list with the same information as the absentee report. The export will return the list in a different format which can be exported to excel if you choose to do so.
3. **Applicant Position List**: This report will provide you with a list of applicants ranking from highest to lowest. Their applicant information is also shown on this report.
4. **Apprentice List**: This report will return a detailed list of all apprentices.
5. **Apprentice Wage Report**: This report will return a list of all members in your tracking system and show what percentage of the journeyman rate they are currently at along with the date they received this wage increase.
6. **Apprentice Wage Update**: This report will return a list of all members in your tracking system and show what period of the apprenticeship program each individual member is in. It will also return the date at which they moved to the next step of the program.
7. **Certification Report**: Clicking on this link will show you a list of all certifications that you have added to your tracking system. If you look to the right of this list of certifications you will see a link to 'Member Report'. Clicking on this link will return to you a list of all active members who are current with that certification.
8. **Advancement Report**: This report will give you the ability to view all wage updates and/or changes in status for any period of time that you specify up to one year.
9. **Wage Forecast Report**: To view a list of pending wage reviews, click the 'Wage Forecast Report'. This report includes members' names, last wage update, wage review date and number of days before the next wage review. This report can only be generated if a wage rate has been entered.
10. **Local Details**: This report will show the details of the information you have entered into the system pertaining to your particular local.
11. **Certification Counts**: This report will give you the option of returning cert counts in three different ways: Count all Certifications Currently Active, Count all Certifications grouped by month, and Count all Certifications grouped by quarter.
12. **Employer Roster**: This report will show a list of all employers along with their contact information.

13. **Employer Projects**: This report will show a list of all projects corresponding to each employer.
14. **Employer Letters**: Click on this link will give you the capability of sending custom letters to your employers.
15. **Quarterly Training Report**: This report will show a summary report for apprentices. It shows the apprentice member wage scales being paid at that time categorized by the members' gender and ethnicity.
16. **Cert Types – Drilldown to Member**: This report will list all certifications in your system and show the number of members who have each certification. You have the option to drilldown

to view the members who have each certification and when that certification will expire. Click the '+' next to each certification to drill down. Example shown below:

17. **Local Certifications by Effective Date:** This report will list all certifications in your system along with the members who have each certification and when that certification will expire.
18. **Voter Registration**: This report will provide the total number of members in your local who are registered to vote. It will also provide the totals for those that are not registered as well as those for which there is no COPE record. You have the option to drill down to view a list of members who are registered to vote. You will also be able to see who is not registered along with what districts these members reside in. Example shown below:

Member	Phone No.	MemberNo		Total No Mbr's	Reg'd	% Reg'd	Not Reg'd	% Not Reg'd	No Cope Record	% No Cope	Chg'd Local
⊞ A - Apprentice				11	7	63.6%	4	36.4%	0	0.0%	0
⊞ H - Honorary				8	6	75.0%	2	25.0%	0	0.0%	0
⊞ J - Journeyman				100	50	50.0%	49	49.0%	1	1.0%	0
⊞ P - Lifetime				57	39	68.4%	15	26.3%	3	5.3%	0
Totals For: IRONWORKER LOCAL UNION 9				176	102	58.0%	70	39.8%	4	2.3%	0

6/21/2012 9:05:09 AM Voter Registration Page: 1 of 1

Rev 03 - 01/03/2012

Admin

The admin portion of the Online Apprenticeship Tracking System is where you will enter administrative functions and view information about classes, certifications, and field experience for your JATC.

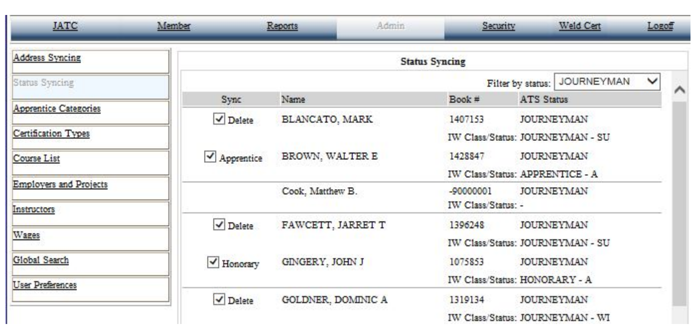
Address Syncing

This area of the system will give you the ability to sync the addresses that you have in the ATS with the addresses at the International headquarters. This is a bulk process which will quickly update your records all at once.

10. Navigate to 'Admin' on the top menu.
11. Choose the 'Address Syncing' option on the left side.
12. The system will search for all addresses that do not match exactly to the address that the International has for your members. The address in your system will be on top and the address of the International will show directly below.
13. By default, all addresses are set to be synced to the International address. If you choose not to sync a particular address, uncheck the box to the left of that member's name.
14. Scroll to the bottom of the page and click 'Sync Checked Addresses' to change your addresses to the suggested address at the International. Note: The list will show twenty six mismatches at a time in alphabetical order. Once you click on 'Sync Checked Addresses' the system will show you the next twenty six mismatches. You will need to continue to sync until you have gone through all of your members.

Status Syncing

This area of the system will give you the ability to sync the statuses of your members that you have in the ATS with the statuses that the International keeps. This is a bulk process which will quickly update the statuses of your members all at once.

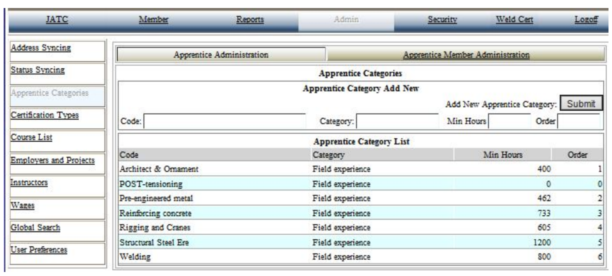


1. Navigate to 'Admin' on the top menu.
2. Choose the 'Status Syncing' option on the left side.

3. Choose which status you want to search for. You can do this by clicking the drop down box on the right side of the screen.
4. In the above image, I chose to search for all 'Apprentice' whose status in the ATS did not match the status that the International had for those members. You can see the results in the image above.
5. The status that you have for each of these members is listed on top. The status that the International has on these members is shown directly below your status. By default, all items are checked to be synced with the International. If you choose not to sync a status, uncheck the box to the left before you continue.
6. Scroll to the bottom of the page and click 'Process Checked Records' to update all of the statuses in your system to those of the International system.
7. Choose another status to search for other status changes that may need to be synced.

Apprentice Categories

To make it easier on you, 'Apprentice Categories' have been preloaded with the basic categories that a local might want to track about their apprentices' field experience. Additional work categories may be added. The 'Apprentice Categories' that you enter here are used later in the system when entering



information to track what type of work an apprentice has experience with.

Add a new apprentice category

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Apprentice Categories' option from the left side menu.
3. Under the 'Apprentice Category Add New' heading, enter the Code, Category, Minimum hours, and the Order, if applicable.
4. Click 'Submit' to add your new apprentice category to the system. Note: You do not have the ability to delete a category from the list but you can edit a category by clicking on that category and making the necessary changes.

Certification Types

This section of the system is where you will apply certifications to members records for which you have entered in the appropriate course information. You will use this section when you need to print certification cards for your members. The most common certifications have been preloaded. As with 'Apprentice Categories' you may add a certification that is not already listed here.

Add a new certification to your list of certifications

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Certification Types' option from the left side menu.
3. At the top of the screen under 'Certification – Add New' heading, enter the Code and a description of the certification that you are adding to the list.
4. Click 'Submit' to add your new certification to the list.

Edit or delete a certification from your list of certifications

Note: You have the capability of deleting certifications off of the list if you will not be using them. You can only delete a certification if none of your members have that certification on their record.

1. Click on the certification that you would like to delete
2. If you only want to edit the certification, make your changes and click 'Save'.
3. If you would like to delete this certification from the list, click the 'delete' button on the top right.
4. That certification will then either be deleted or show the changes that you made to it.

Certification and Course Prerequisites

The National Guideline Standards and the IACP Core Curriculum call for "Rigging and Cranes" to have a combined minimum of 80 hours of instruction. The syllabi for the two courses breaks the 80 hours down into 40 hours minimum for each course. In order to qualify for the "Qualified Rigger" certification, both courses and the full 80 hours must be completed. To qualify for the "Cranes Signalman" certification only, the 40 hour Cranes course, or 15 hour Crane Signaling Certification course must be completed. Both courses include all required assignments and minimum required test scores. Prerequisites have been added to the Apprentice Tracking System to help with these requirements. These prerequisites are applied by the International. The system will only allow a rigging card to be printed if a member has completed a 40 hour Rigging class or a self-study rigging class and a 40 hour Cranes Signalman class or a self-study Crane signalman class. Please contact the International if you would like to add other prerequisites to your course list.

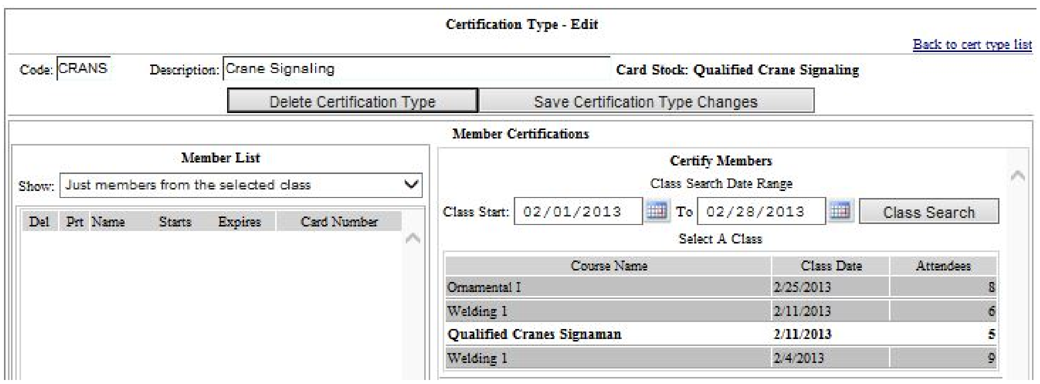
Assign Certifications to a class & print certification cards

After a class has finished, the next step is to apply the certification information to the member records if a certification is provided for that particular class. Some classes do not have a certification associated with them. A certification card would also be created to give to those members. The ATS gives you the ability to print your own cards or to print the cards that are provided by the National Fund. **If you choose to print the cards provided to you by the National Fund, you will need to contact Brian Caskey at the International Office before these steps will allow you to do so.** If you do not contact him, you will only have the ability to export the certification information to excel which will allow you to print your own cards using the information that you entered into the system. In this example we are going to issue certification cards for members whom we put into a Cranes class.

1. Navigate to the 'Admin' tab located on the top menu.

2. Click on the ‘Certification Types’ option on the menu to the left.

3. You should now see a list of the certifications that you provide to your members. Scroll down to the certification that you would like to apply to member’s records. In this example, we will scroll down to the ‘Cranes Signalmen’ certification and select it.
4. On the right side of the screen you will see a date range for you to enter in. All classes that

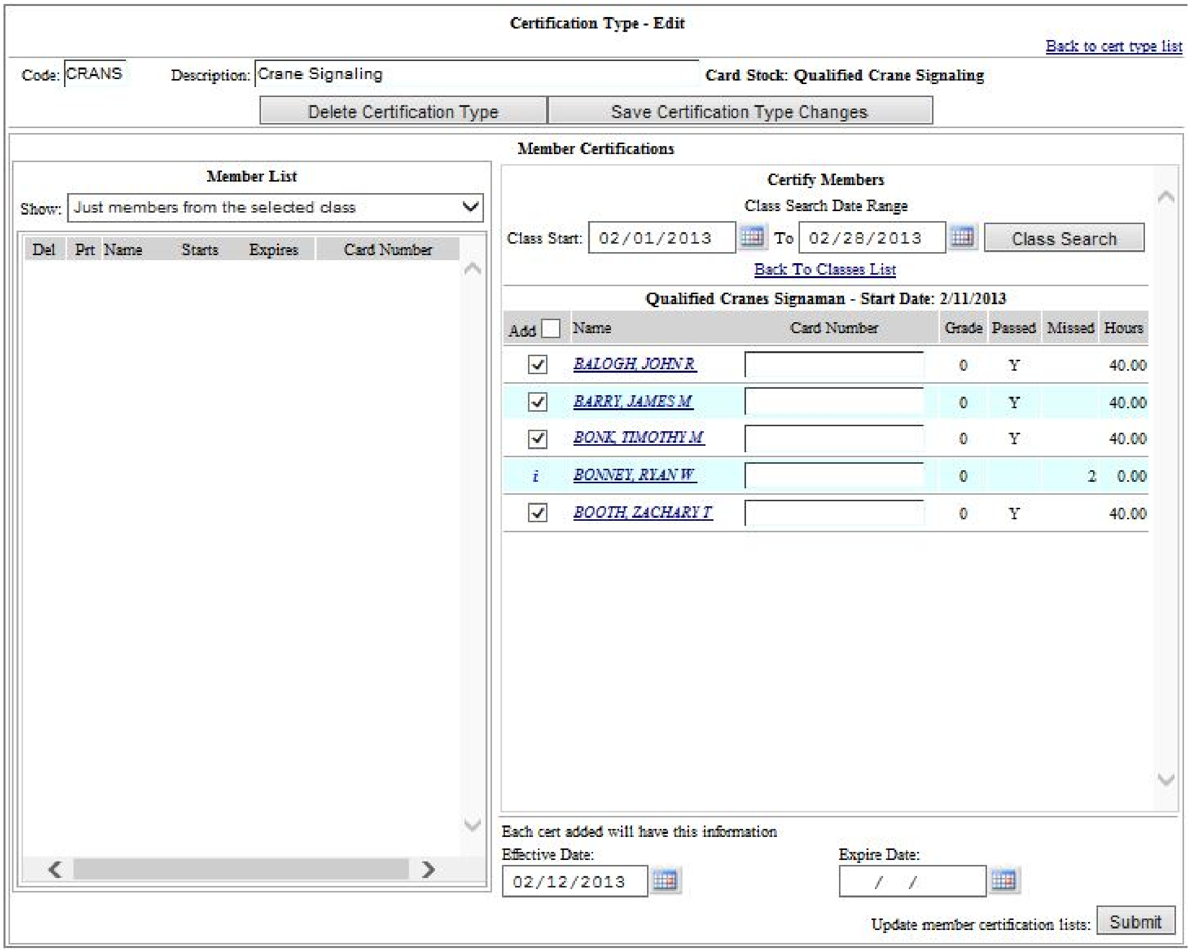


occurred within the last month will automatically show up. If you do not see the class that you entered, you may need to adjust the date range and click on ‘Class Search’. The ‘Cranes’ class started more than a month ago so we will adjust the ‘class start’ date and click ‘Class Search’ to list all classes from ‘2/1/2013’ to ‘2/29/2013’. We now see the ‘Cranes’ class and can select it to move to the next step.

Note: Notice the other classes that are listed are grayed out and you are unable to select those classes. There are two reasons why this happens:

a. The class is not **closed out** so you cannot yet apply the certification. Certifications can only be applied to a closed out class.
b. All Classes are grayed out except for the type of class for which certification you selected. For instance, you can’t give a ‘Cranes’ certification to a group of members who to the ‘Blueprint’ class.

5. You should now see the list of members you put into that class. Some of these members may not have completed that class. Notice the columns showing the members grade, passed, hours, and missed classes. You will be unable to apply a certification to a member who did not pass the class or has not complete the prerequisites. Check the boxes next to the members for which you

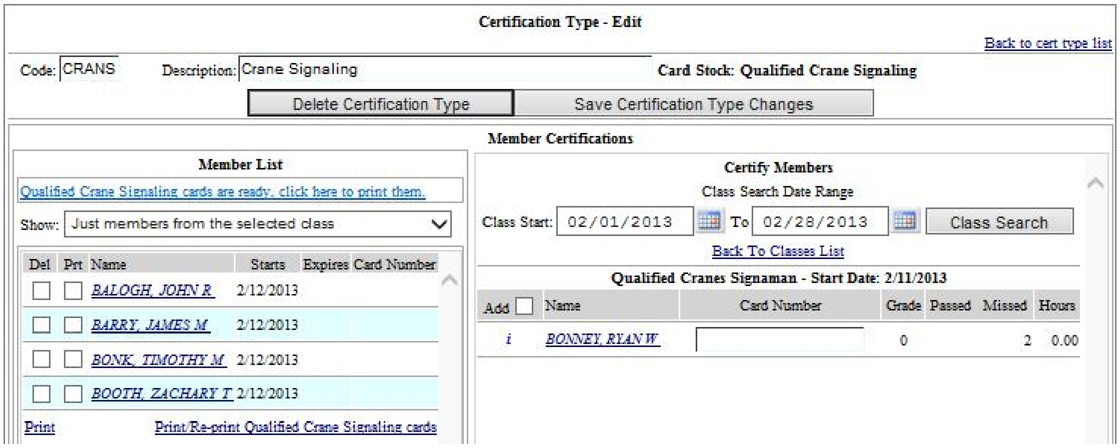


want to apply this certification. Notice that each member is blue and underlined. This means that the members are clickable and you will be taken to that member's record showing all of his certifications if you choose to do so.

6. There is a space for a card number if there is a need for it.
7. Scroll down to the bottom of the screen where you will enter in the start date for the certification along with the expiration date. Some certifications do not expire. In this case, leave the expiration date empty.
8. Click the 'Submit' button on the bottom right to apply this certification to each of the checked member's records.

As you can see in the example, the members who passed the 'Cranes' class are now listed on the left side which means that you have applied the certification to all of their records. The members who did not pass the class are still listed on the right hand side and the certification has not been applied to their records. If this certification has a card that goes with it and you have had your system set up to print cards for this certification then you will see a link labeled 'Print Qualified Crane Signaling Cards'. The 'Cranes' certification falls into this category so we do see this link in my example. Follow these steps to print your certification cards.

1. To the left of each name is a check box with a heading of ‘Prt’. Check each box for which you would like to print a card.



2. Click the ‘Print/Re-Print Qualified Crane Signalmen Cards’ link if you are ready to print the National Fund cards.
3. You will now notice a new link at the top that says ‘Qualified Crane Signaling cards are ready, click here to print them.’ Click this link to open a pdf view of your cards.

4. You can now print these cards on your own color printer. As you can see in my example, one of the members has a photo associated with his record and one member does not. To include the photo you will fold the right side of the card behind the left side and laminate. You will then end up with a front and back card. For the member without the photo you will tear the perforation down the middle and throw away the right side. You will then hand out the left hand side to the member. **THESE CARDS ARE FORMATTTED TO PRINT ON AVERY 8371 PERFORATED PAPER.**

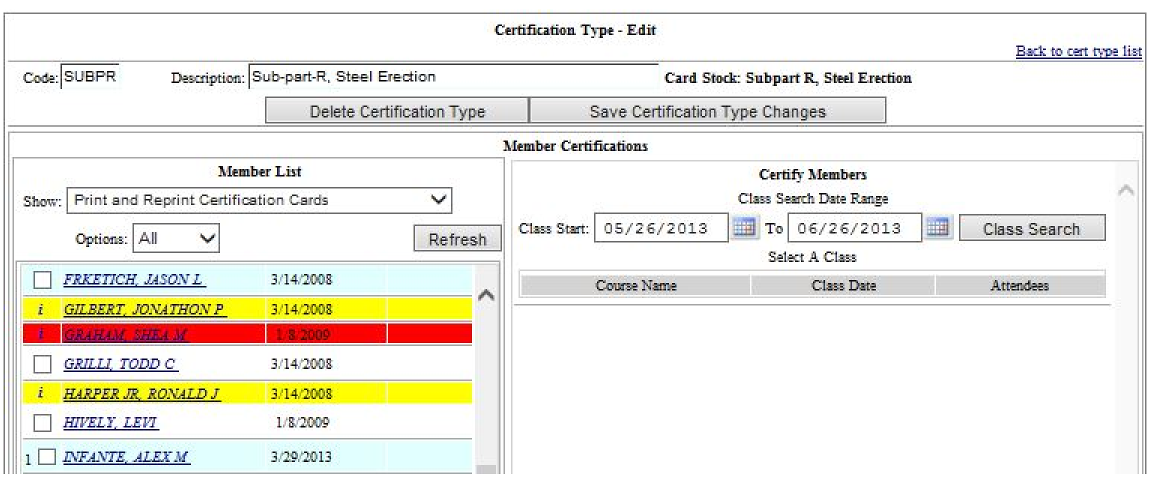
Note: After clicking print, a print dialog box will then open. You need to be sure that 'Page Scaling' is set to 'None'. You can locate the 'Page Scaling' option on the left side of the dialog box in the middle.

Re-printing certification cards

There will come a time when it will be necessary for you to re-print a card. This will most likely happen because a member has lost his card or the card has been damaged in some way. Follow these steps to re-print a certification card.

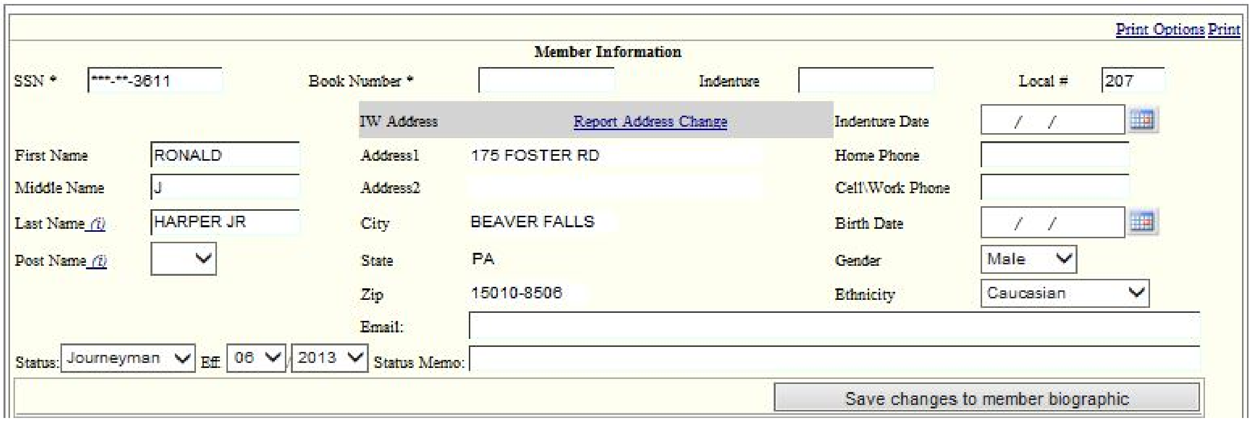
1. Navigate to the 'Admin' tab located on the top menu.
2. Click on the 'Certification Types' option on the menu to the left.

3. You should now see a list of the certifications that you provide to your members. Scroll down to the certification that you would like to re-print cards for. In this example, we will scroll down to the 'Subpart R' certification and select it.
4. Select the drop down box on the left and choose the item 'Print and Reprint Certification Cards'.



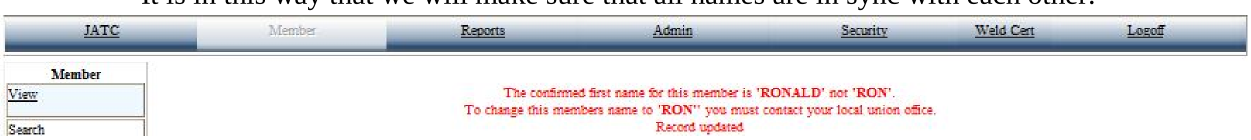
5. You will then be provided with a list of all members who have that certification with empty check boxes to the left of their names. Just check the boxes next to the names for the individuals you would like to print.

   Note: If you see a members name and it is highlighted like the members you see in the example, you will be unable to print cards for these members. The highlight is a flag to you that these records need to be synced with the Internationals current membership records before a card can be printed. As you can see, the check box has been taken away and replaced with a lower case (i). If you place your mouse over the (i) you will be given an explanation of why that member is highlighted. A red highlight means that the ATS could not find this member in the International database of members. This most likely occurs when a member's book number has changed in the member area. Go to that member's record and fix the record so that the system can match him to a member in the International database. Once you have done this, the red highlight will go away and you will be able to print cards for that member. A yellow highlight means that there is a name mismatch. The spelling that



you have for that member does not match the spelling that is in the International database for that member. Locate that member record and you will notice the (i) symbol to the left of that member's name. Place your cursor over the (i) and the system will show you what the spelling is in the International database. Clicking on the (i) will automatically replace the name you have with the correct spelling of the name. You must do this for each instance of the (i). In this case you would need to fix two items. Click 'Save changes to member biographic' to save your changes. You will now be able to print cards for this member.

If you attempt to make a change to the name of a member in the ATS it must match the spelling of the name in the International database. For instance, if I try to change the name of this member's record from 'Ronald' to 'Ron' the system will give the message you see here: It is in this way that we will make sure that all names are in sync with each other.



6. After checking the boxes, scroll down to the bottom of the list and click on 'Print/Reprint Cards'.

NOTE: Notice the numbers to the left of the names in the screenshot. This indicates the number of cards that have already been printed for these members in the past.

7. Clicking the link at the bottom will then create a new link for you to click at the top of the list. Click on the link located at the top of the list.
8. This will open a PDF file with all of your cards so that you can print them.

   NOTE: USE AVERY 8371 PAPER IF YOU HAVE AN INJET PRINTER AND USE AVERY 5371 PAPER IF YOU HAVE A LASERJET PRINTER.

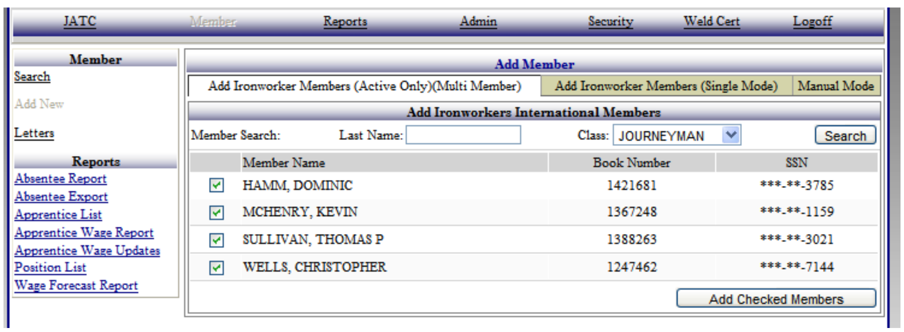
   NOTE: After opening the pdf, selecting 'File' and selecting 'Print', you need to make sure that 'page scaling' is set to 'none' before sending the cards to the printer.

Generate Apprentice to Journeyman Rigging and Cranes certification cards

Step 1 - ***Perform member "Add New" for Journeyman***

1. Navigate to 'Member' on the top menu
2. Select 'Add New' on the left menu
3. You are now looking at the 'Multi Member' view and can add 100 members at a time. Any members listed here have not already been added to your Apprenticeship Tracking System. In this tutorial we are interested in adding the entire list of active journeyman in your local who are not already in your system. Change the 'Class' to 'Journeyman' and click on the 'Search' button.
4. Any member who record has a check box next to it will be added to your system. Scroll to the bottom of the screen and click 'Add Checked Members'.

NOTE: Only 100 members are added at a time so you may have to scroll down again and click on 'Add Checked Members' to get the next 100 members on the list.

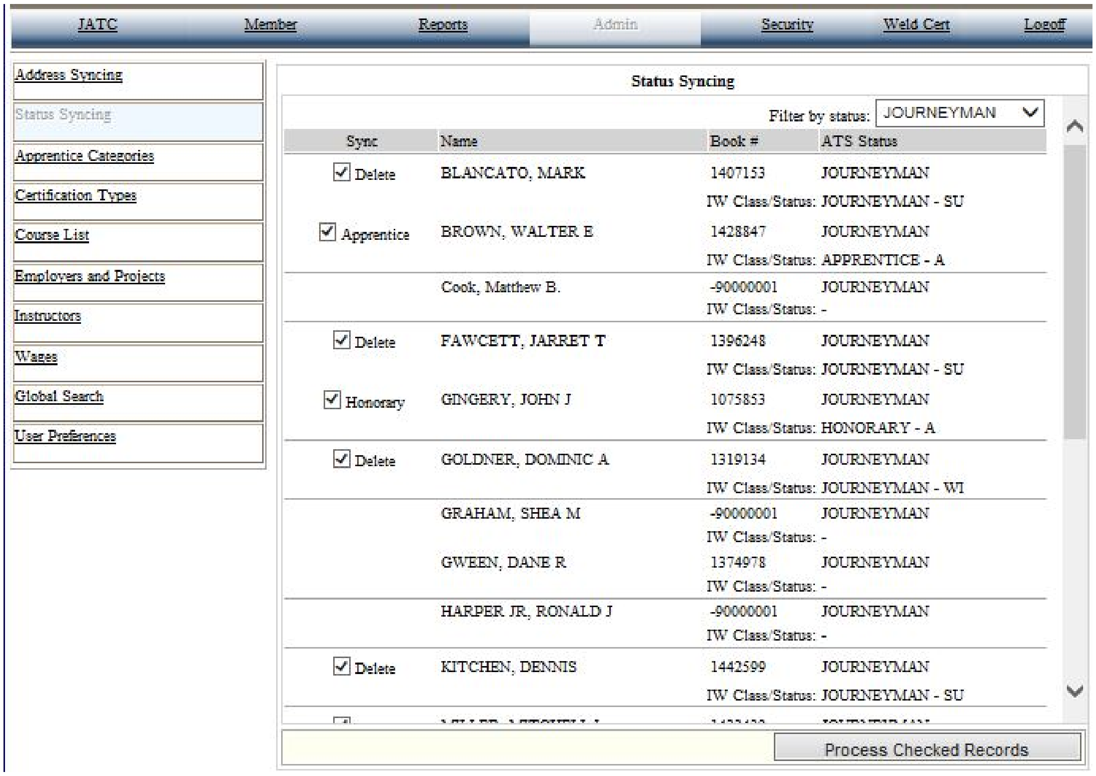


Step 2 - ***Verify that all of your records are in sync with the International***

1. Navigate to 'Admin' on the top menu and then choose 'Status Syncing' on the menu to the left.

   NOTE: If you do not see 'Status Syncing' on the left, this feature is not turned on. Navigate to 'Security' on the top menu, select your user name and add 'Status Syncing' under 'Permissions'.

2. Notice the drop down box on the right side of the screen. Click the down arrow next to the box and select 'Apprentice'.
3. The system will search all of the apprentices that have been added and provide you with a list of apprentices whose status does not match that of the International. Scroll down to the bottom of the list and click on 'Process Checked Records' to sync all of these records to that of the International.
4. Perform these same steps for the Journeyman by changing the dropdown box to 'Journeyman'. This function should be performed to update the status on your Journeyman to ensure only active Journeyman will be receiving a Rigging Certification.

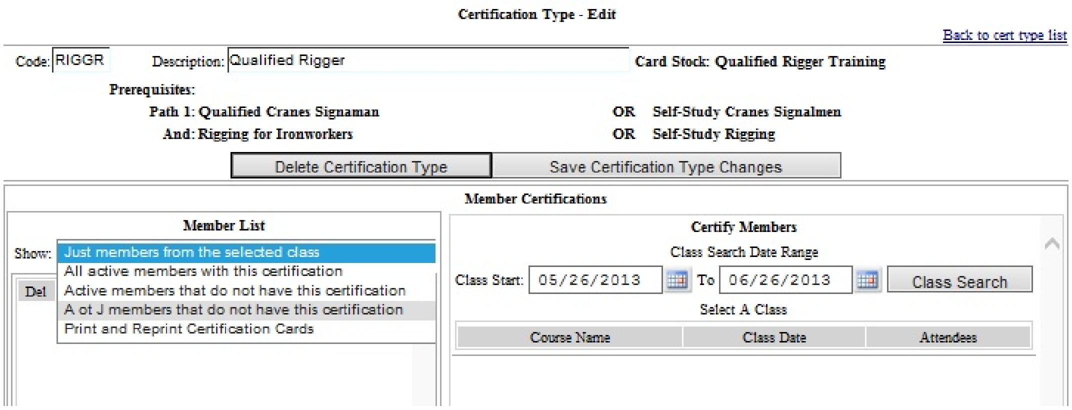


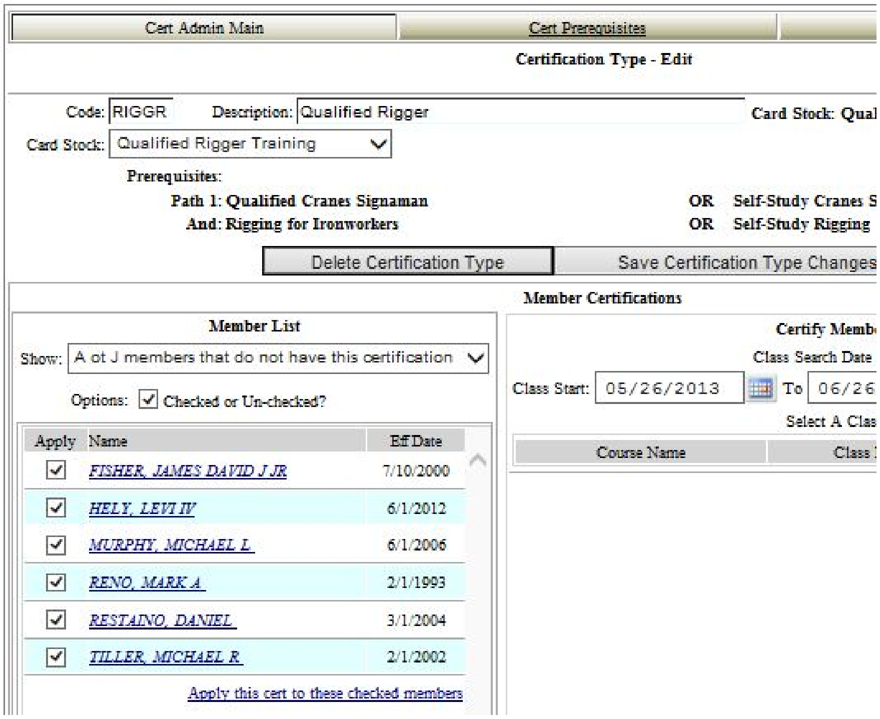
Step 3 – ***Apply the Rigging and Cranes Certification to all active journeymen who have gone through an apprenticeship and have a 'A to J' activity record.***

NOTE: You should have already contacted the National Fund and had the certified Rigging Card assigned to your rigging certification as well as the Cranes Card assigned to your cranes certification.

1. Navigate to 'Admin' on the top menu and then select 'Certification Types' on the menu to the left.
2. Select the certification you would like to apply to all journeymen who completed an apprenticeship program. In this tutorial we are going to select the 'Qualified Rigging' certification. You can follow these same steps for the 'Cranes' certification.
3. Notice the drop down box on the left side of the screen. Select the option 'A to J Members that do not have this certification'
4. The system will bring up the entire list of journeyman in your local that have gone through an apprenticeship program and do not have the Rigging certification on their record. You will also see the effective date from the International of their class change from apprentice to journeyman. All of these members will have check boxes next to them and should be checked. Uncheck any member that you do not need to print a National card for.
   NOTE: If you have already issued Rigging certifications to certain members, they will not be listed on this list.

5. Scroll down to the bottom of the list and click the link 'Apply this cert to these checked members'

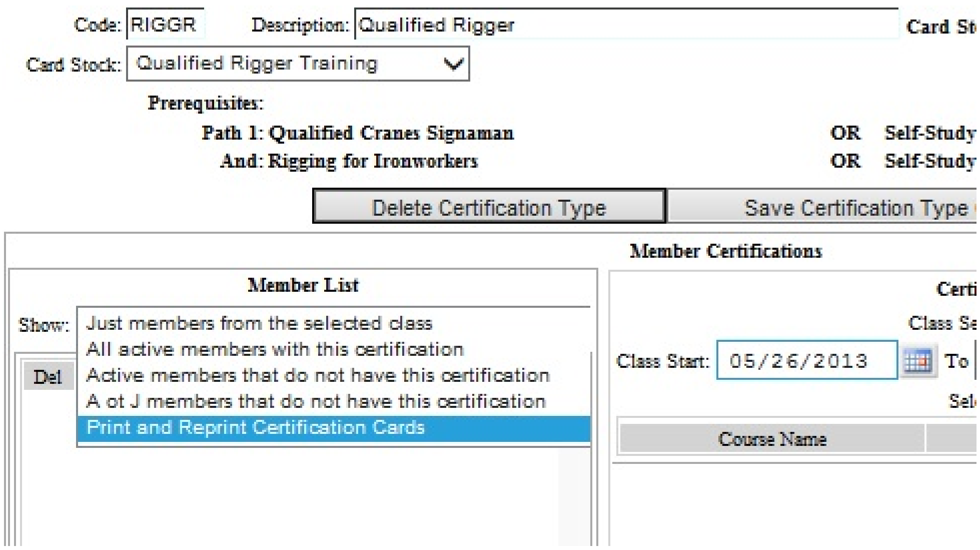




Step 4 – ***You can now print or reprint National Fund cards for this certification.***

9. Now that you have applied the certification to all active journeymen who have completed an apprenticeship program, you can print their certification cards. Select the drop down box and choose the item 'Print and Reprint Certification Cards'

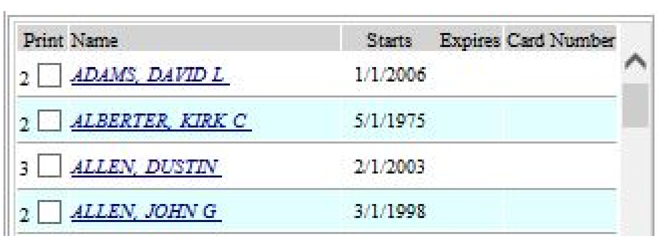
10. You will then be provided with a list of members with empty check boxes to the left of their names. This area is where you would come if you wanted to only print a few cards at a time



or if you needed to reprint a card. Just check the boxes next to the names for the individuals you would like to print.

11. After checking the boxes, scroll down to the bottom of the list and click on 'Print/Reprint Qualified Rigger Training Cards.

NOTE: Notice the numbers to the left of the names in the image below. This indicates the number of cards that have already been printed for these members in the past.



12. Clicking the previous link at the bottom will then create a new link for you to click at the top of the list. Click on 'Qualified Rigger Training cards are ready, click here to print them.'
13. This will open a PDF file with all of your cards so that you can print them.

    NOTE: USE AVERY 8371 PAPER IF YOU HAVE AN INJET PRINTER AND USE AVERY 5371 PAPER IF YOU HAVE A LASERJET PRINTER.

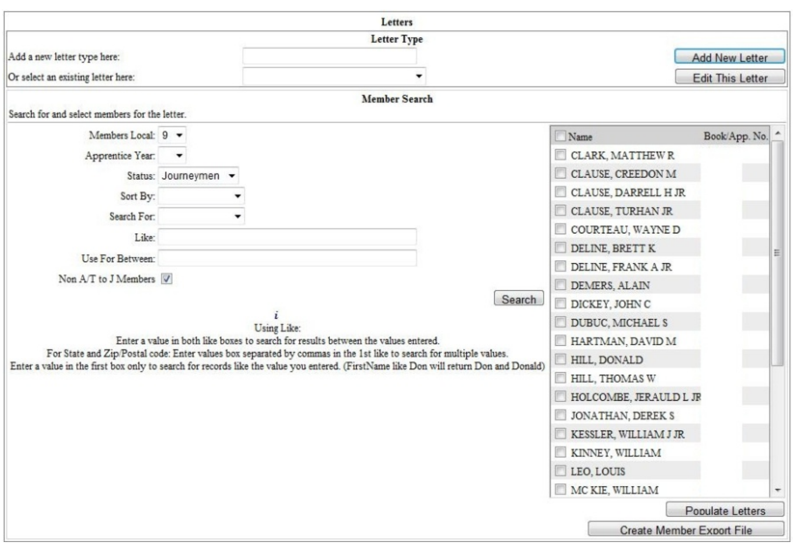
    NOTE: After opening the pdf, selecting 'File' and selecting 'Print', you need to make sure that 'page scaling' is set to 'none' before sending the cards to the printer.

14. The previous steps showed you how to print/reprint cards of members that you selected. If you want to print cards for all of these members at once you would follow these steps. After you selected from drop down box to 'Print and Reprint certification cards' in step 1, you would then see two more drop down boxes with the words 'all' in both of them. Change the left box to 'Print' and click on 'Refresh'.

15. You will now see a list of all of the members that have never had cards printed for this particular certification. All the boxes are checked for you and all you need to do is follow steps 3 through 5 to print all of the cards.

Step 5 – ***Generate a list of all Journeymen that will need to be notified to attend a Rigging training course.***

1. Navigate to 'Members' on the top menu and then select 'Letters' on the menu to the left.
2. There will be a drop down box to the right of the word 'Status'. Select 'Journeymen' from the drop down box and click on 'Search'.
3. You should now see a complete list of all the Journeymen in your system. Check the box next to 'Non A to J Members' and click on 'Search' to get a list of all Journeymen who have not gone through an apprenticeship and therefore did not receive Rigging or Cranes cards.
4. You can now generate a letter to all of these members notifying them of an upcoming Rigging class and you can also generate mailing labels for all of these members by selecting 'Create Member Export File' at the bottom of the list and exporting this information into Excel.



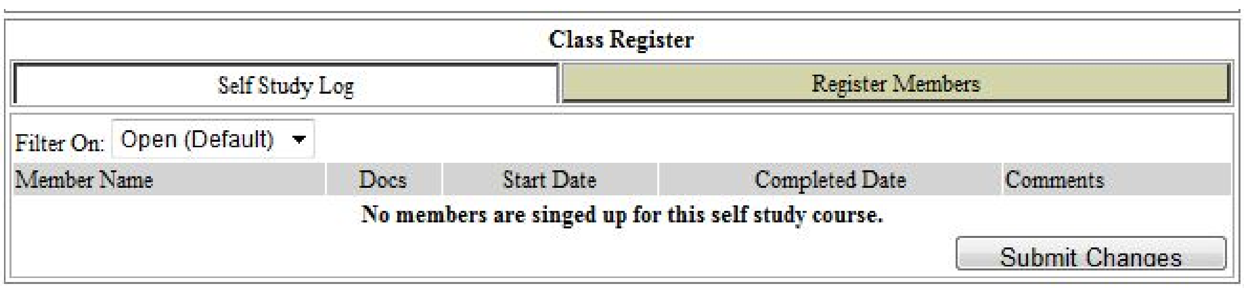
Rigging and Cranes Self Study

A self-study course has been created for the Rigging and Cranes certification in an effort to provide journeyman with rigging and cranes certification without having to attend an 80 hour course. **Note: these self-study classes are for Journeyman only.** The self-study courses have been added to your list of default courses. Navigate to 'Admin' and choose 'Course List' from the left side menu. You will find three additional courses just like the ones you see here in the screen shot.

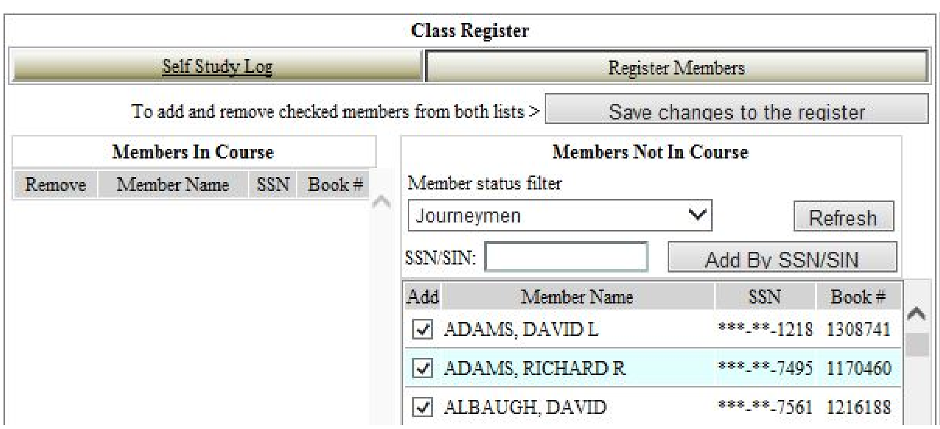
SSCRS	Self-Study Cranes Signalmen	3	Alternative Learning Approach	0	0	0	Y
SSLOG	Self-Study learning enrollment log	0	Alternative Learning Approach	0	0	0	
SSRIG	Self-Study Rigging	4	Alternative Learning Approach	0	0	0	Y

Journeyman will choose to start their self-study course on different dates and will complete the course on different dates. These courses were set up specifically to handle this. Follow the steps below to register journeyman into these self-study courses and document the start and end time for each participant.

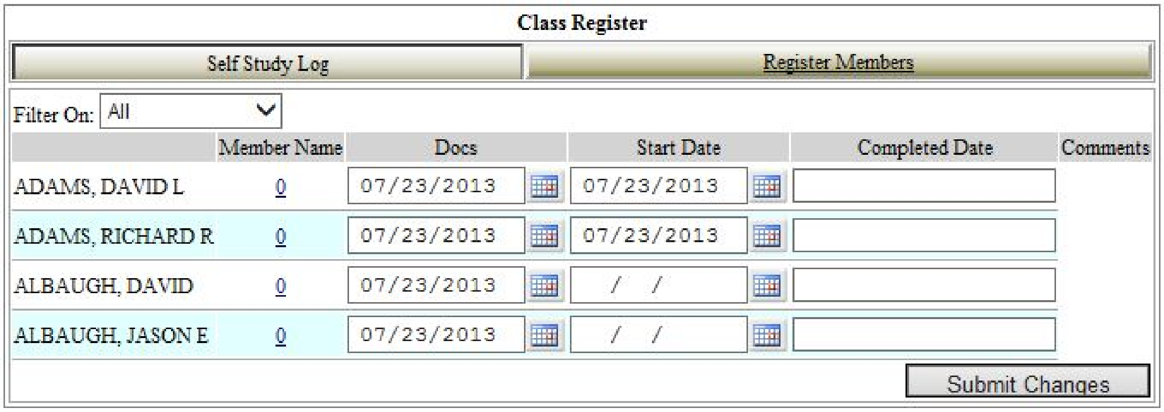
1. Click on the 'Self-Study Learning enrollment log' to register journeyman into a self-study Rigging and Cranes class. In my example, there are currently no other Journeyman that have been registered. Choose the drop down box labeled 'Filter On' to view journeyman who have already completed the self-study course. The default is to show only those journeymen who have not completed the course.



2. Click on 'Register Members'. On the right side of the screen you will see a list of all journeymen



that have been added into your system. Check off the boxes of the journeyman who are taking the self-study course. Click 'Save changes to the register'. The start date will automatically be filled with the date that you registered them into the course. This is the date that the journeyman came in for their study material and officially started the self-study course. This date can be changed if the date the information was added was not the same date that the member started the course.


Class Register

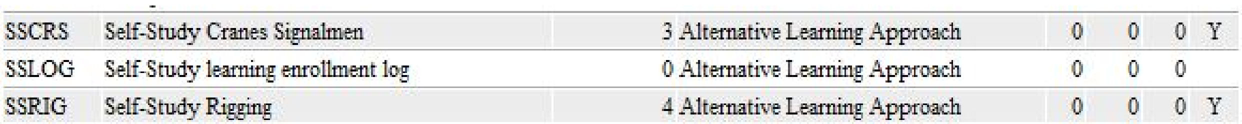
Self Study Log | Register Members

Filter On: All

	Member Name	Docs	Start Date	Completed Date	Comments
ADAMS, DAVID L	0	07/23/2013	07/23/2013		
ADAMS, RICHARD R	0	07/23/2013	07/23/2013		
ALBAUGH, DAVID	0	07/23/2013	/ /		
ALBAUGH, JASON E	0	07/23/2013	/ /		

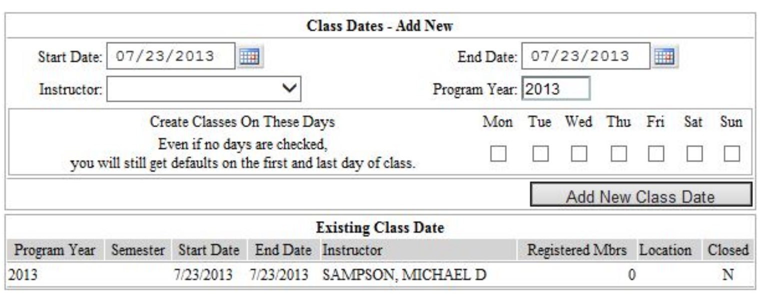
Submit Changes

3. Each member will return to you when they feel that they have had enough time with the material in order to pass the test that will be given. Fill in the 'Completed Date' when each member returns. Comments can also be entered into the 'Comments' box. Be sure to click 'Submit Changes' after entering in the 'Completed Date'. Those members for which you entered a 'Completed Date' will be removed from the list.
4. Now that one or more members are ready to take the test, navigate to 'Admin' and choose 'Course List' from the left side menu. Choose either 'Self-Study Cranes Signalmen' or 'Self-



SSCRS	Self-Study Cranes Signalmen	3	Alternative Learning Approach	0	0	0	Y
SSLOG	Self-Study learning enrollment log	0	Alternative Learning Approach	0	0	0	
SSRIG	Self-Study Rigging	4	Alternative Learning Approach	0	0	0	Y

Study Rigging'. The information will have to be entered into both courses. I will choose 'Self-Study Cranes Signalmen' for my example.


Class Dates - Add New

Start Date: 07/23/2013 End Date: 07/23/2013

Instructor: Program Year: 2013

Create Classes On These Days
Even if no days are checked,
you will still get defaults on the first and last day of class.

Mon Tue Wed Thu Fri Sat Sun

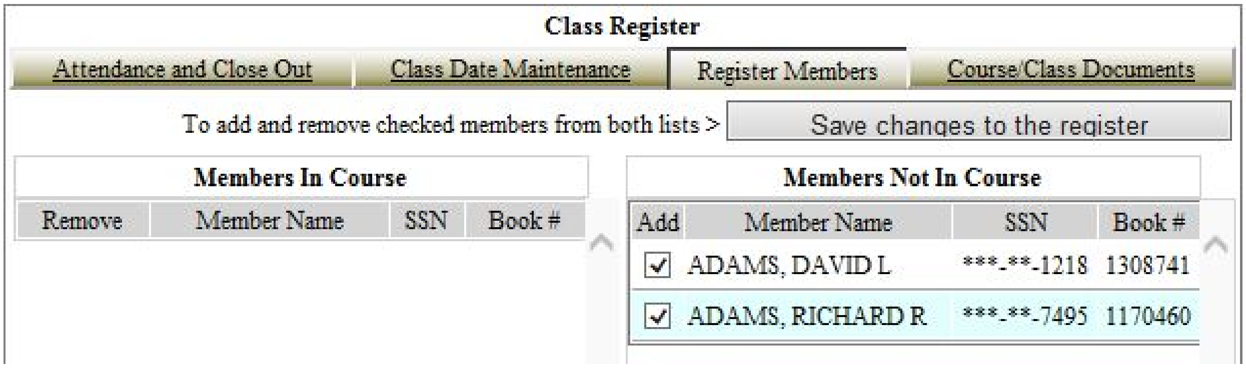
Add New Class Date

Existing Class Date

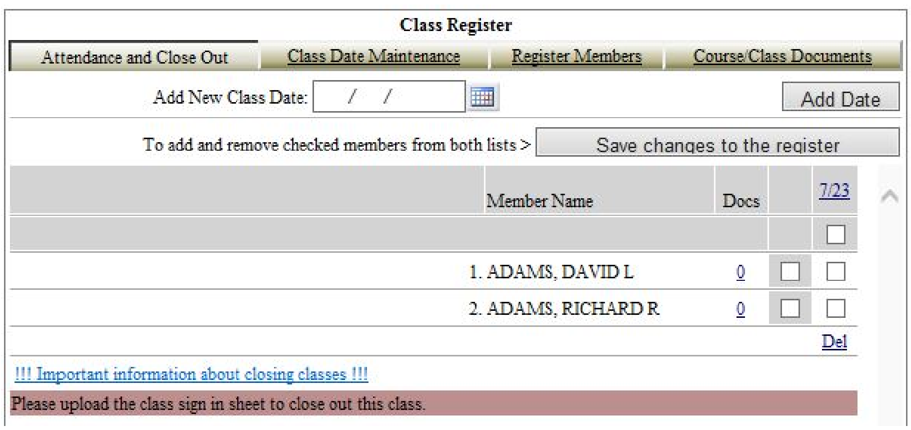
Program Year	Semester	Start Date	End Date	Instructor	Registered Mbrs	Location	Closed
2013		7/23/2013	7/23/2013	SAMPSON, MICHAEL D	0		N

5. Enter in the 'Start Date' and the 'End Date'. The start date and the end date should be the same. This is the day that one or more members will be taking the self-study test. Enter in the 'Instructor' who will be giving the test and click 'Add'. Note: You must have already added your instructors under 'Admin', 'Instructors' before you can choose an instructor from the dropdown list. Click here to learn more about adding instructors. Click on the class you just created to register journeymen for the test. **Note: You will only be able to register journeyman who have been entered into the log as explained in the previous steps.** If your journeyman were not registered, they will not show up in the next few steps to finish this process.

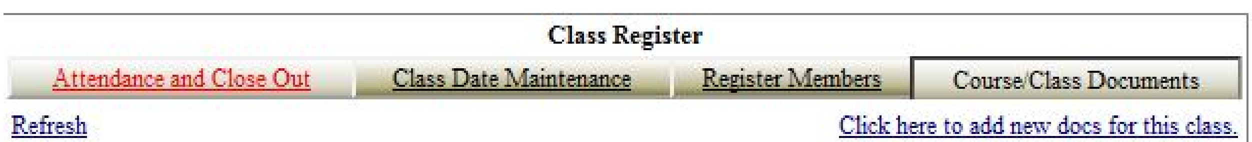
6. Click on 'Register Members' and check the boxes next to the members on the right side who will be taking the test. Notice that only two journeyman show up. These are the two journeymen that I added to the log earlier and entered in a completion date. Click 'Save Changes to the register'.



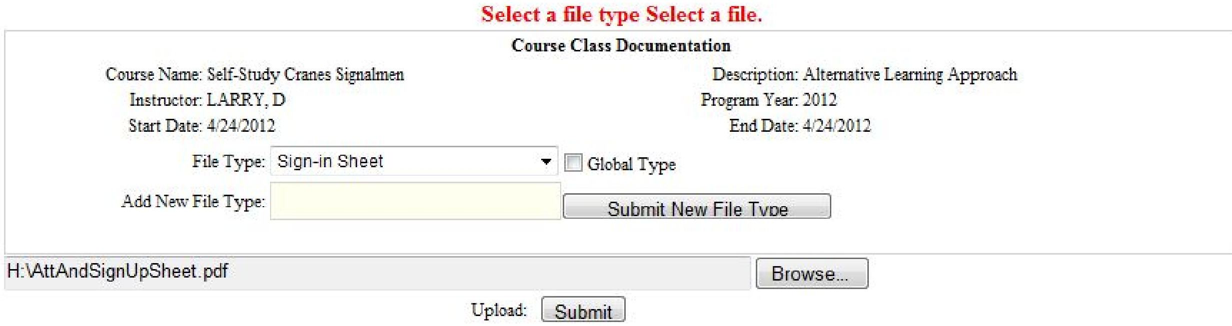
7. The next step is to print the sign in sheet and have each journeymen sign next to his name. This sign in sheet will then be scanned back into the system in order to continue. Click the date on the right side above the check boxes to retrieve the sign in sheet. Once the sign in sheet has



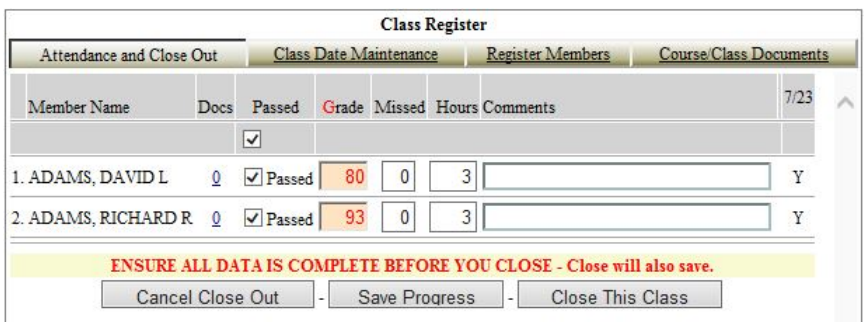
been signed and scanned back in, choose 'Course/Class Documents' to upload your sign in sheet into the system.



8. Click 'Click here to add new docs for this class'.



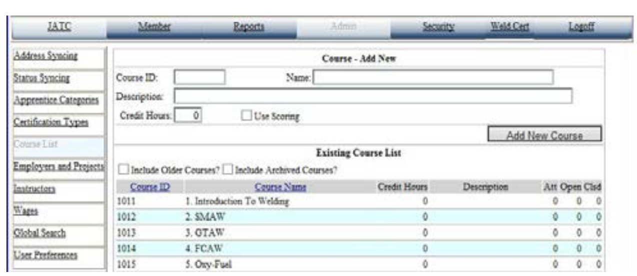
9. Choose the file type of 'Sign-in Sheet' and click 'Browse' to locate the sign in sheet that you scanned into your computer. Click 'Submit' to upload the document to the system. Close this window when you see the notification that the file has been uploaded.
10. Now that the sign in sheet has been uploaded for the members who are taking the test, you can now check the boxes for attendance and click the link which reads 'Close Out This Class'.



11. The last step is to check the boxes next to those members who have passed the test. If you would like to track the grade, you can also enter that information. Once the information has been entered, click 'Save changes and close out this class' to complete the process.
12. You can now print certification cards by following the steps explained here.

Course List

Any course that is offered by your JATC should be listed in this section. As explained previously, the main courses have been preloaded for you. You cannot delete a course if any member record has that information entered in his or her record. This ensures historical data will not be lost. Notice the two



check boxes at the top of your list of courses. Check the first check box if you want to show 'Older Courses' in your list. Any course that has not had a class held within the last two years will be hidden from view for your convenience. The course will no longer be hidden as soon as a recent class is entered into the system.

Check the second check box to include 'Archived Courses'. You can make any course an archived course. You would do this in a case where you wanted to remove a course from your list but were unable to delete the course because there were classes held in the past. Archiving the course would hide it from your view, prevent the course from being used again by others, and still keep your past records intact.

Add a new course to your list of courses

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Course List' option from the left side menu.
3. Under the 'Course – Add New' heading, enter the Name, Description, and Hours of the new class that you are adding. Note: Entering in a 'Course ID' is optional.
4. Check the box next to 'Use Scoring' if you want to keep track of test scores and hands on scores.
5. Click 'Add New Course' to add this course to your existing list of courses.

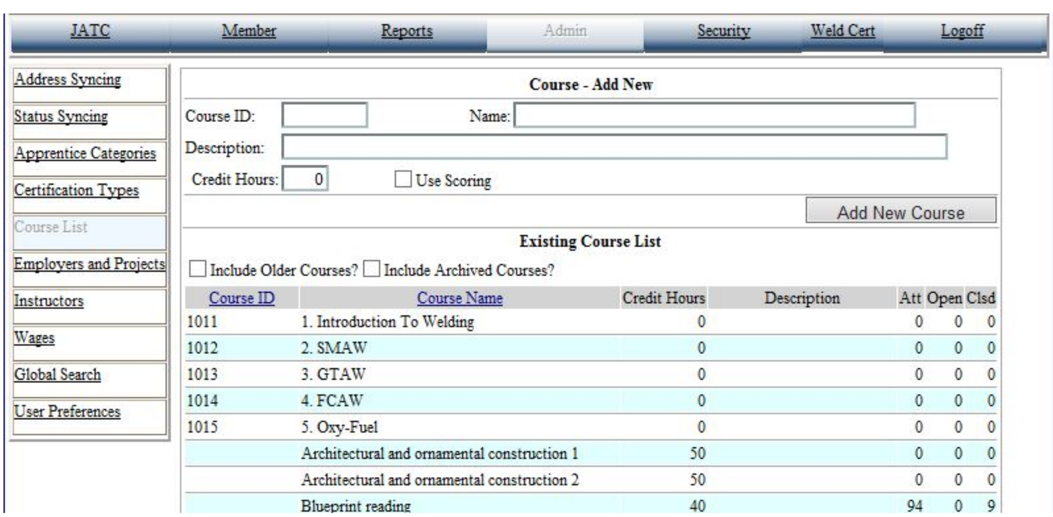
Edit or delete a course from your list of courses

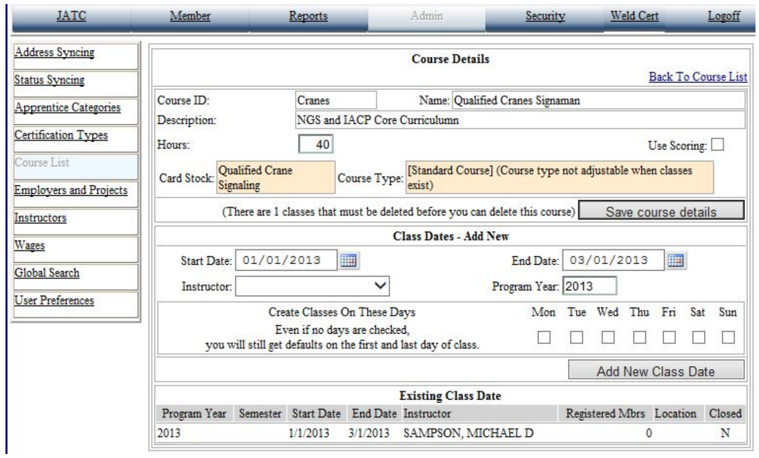
1. Click on the course that you would like to delete. Note: You cannot delete a course if any of your members have that course on their record. You can verify that a course can be deleted by noticing the numbers in the three columns to the right of the course listing. If all columns show '0' then this class can successfully be deleted.
2. Now that the course is open and you can see the details of the course, you should see the 'delete' option.
3. You can make your changes to this course on this screen and click 'Save Course Details' to save your changes or you can click 'Delete' to remove this course from your list of courses. If a course is associated with a certification card you will not be able to edit the course details.

Setup a course

This section of the manual will explain how to set up a course that has either been taken in the past or will be taken in the future. The first step to setting up a course is to choose the course that was taken or will be taken in the future.

1. Navigate to 'Admin' on the top menu. You should now be looking at your course list.





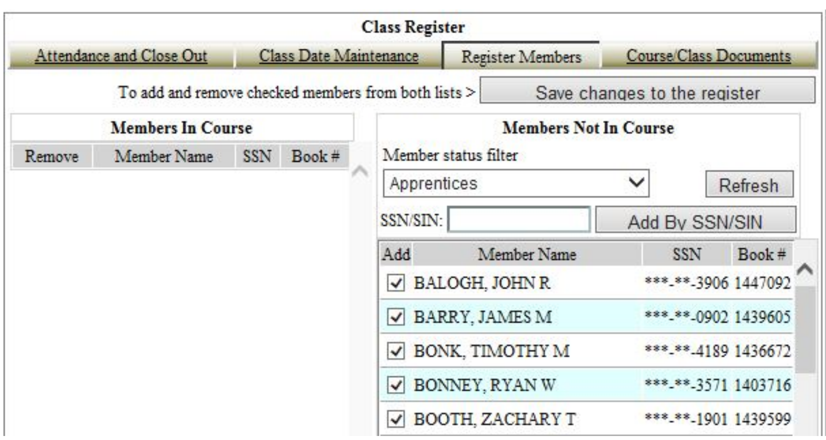
2. Scroll down through the list of courses and click on the course that you want to set up in the system. In this example, I have chosen to set up a 'Cranes Signalmen' course that has happened in the past. Note: Make sure the correct number of hours for this course is filled out in the upper portion.
3. Edit the 'Course Details' to reflect the correct information if need be and click 'Save course details' to save this information for this course. If a course is associated with a certification card you will not be able to edit the course details. Notice the 'Use Scoring' option. Checking this box will enable you to keep track of the possible test score as well as the possible hands on score to calculate a final grade at the end of the class. Check the box if you want to use scoring. Click 'Save Course Details' and enter in the possible score and possible score hands on. Before closing out the class, you will be able to enter in the scores for each member.
4. Enter in the 'Start Date' of the class, the 'End Date' of the class along with the 'Instructor' of the class. Note: Instructors are added to the drop down list in the 'Instructors' option on the left side menu.
5. You also have the option to check off what days of the week your class will be held on. The system will automatically add a date for the first day of the class and a date for the last day of the class. If you were to check the boxes next to 'Mon', 'Wed', and 'Fri', the system would add a date and sign in sheet for every Monday, Wednesday, and Friday in between the start date and end dates that you had entered.
6. Click 'Add New Class Date' to continue setting up this course in the system. As you can see in the image, I have gone through these steps and the class is now showing up under the 'Existing Class Date' heading.

Add members to a course

Now that you have gone through the steps of setting up a course you will need to select the members who were registered to take that course. Follow these steps to register members into a course.

1. Notice that the column under 'Registered Mbrs' shows '0'. This is because we have not yet added any members to the class. Clicking on the class will bring up a screen similar to the one you see here.

2. The first tab shows the members who are registered for this class along with their attendance records. In order to keep attendance, the dates that the class is held need to be added to the system. The first and last date of the class are automatically added for you. In my example, the class was held on five different dates. Add each date that the class was held in the 'Attendance' tab and click 'Add Date' after each entry. This will allow you to keep attendance for each day that the class was held and also provide you with a sign in sheet for each day. You may have chosen to add the dates in the previous step by selecting the days of the week. The system would have then created these dates automatically for you. Adjustments can be made to the class dates by clicking on the tab named 'Class Date Maintenance'. It is here where you can add additional class dates or remove dates if need be.
3. The next step is to add members to this class. Click on the tab entitled 'Register Members'. You will see a list of members on the right hand side for which you can place a check mark in the box



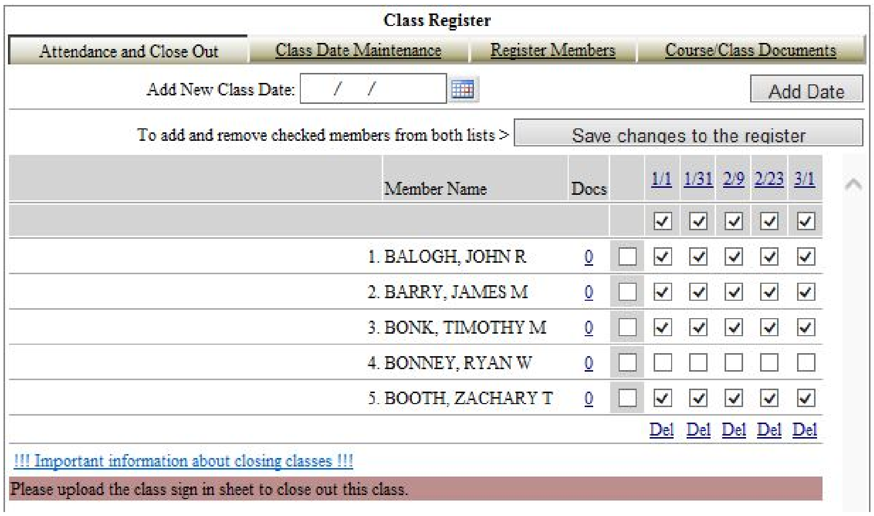
   to the left of the name. After you have checked off all members that took this class, click on the 'Save Changes to the Register' button to add those members to the roster. You can search for your members by scrolling through the alphabetical list or by entering in the member's Social Security number or Social Insurance number and clicking the 'Add By SSN/SIN' button.
4. You may need to add more members of a different status. Simply go back to the 'Register Members' tab, change the 'Member Status Filter' to the type you need and click 'Refresh'. An

alphabetical list of those members will show up allowing you to check those members and add them to the class roster.

Attendance and Sign in Sheets

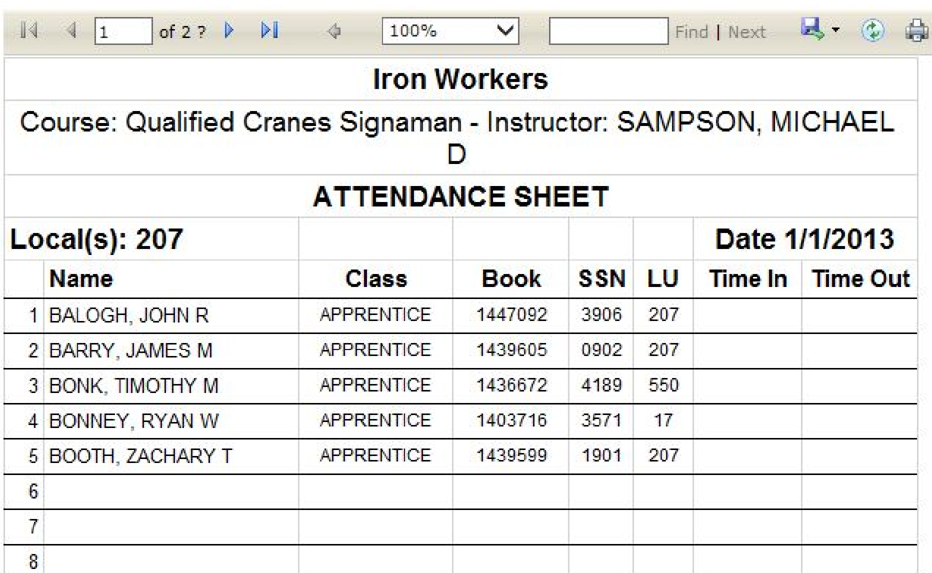
This system provides a way for you to keep track of those members who attended class on each day that a class is held. Attendance sheets and sign in sheets are provided for you and should be uploaded into the system for record keeping.

1. As you can see in my example, there are five members who took this class. I have filled in the attendance for each day that the class occurred. All members were present on each day except for



one member who missed all five classes.

2. Clicking on the dates of the classes will provide you with an attendance sheet for the instructor



Iron Workers

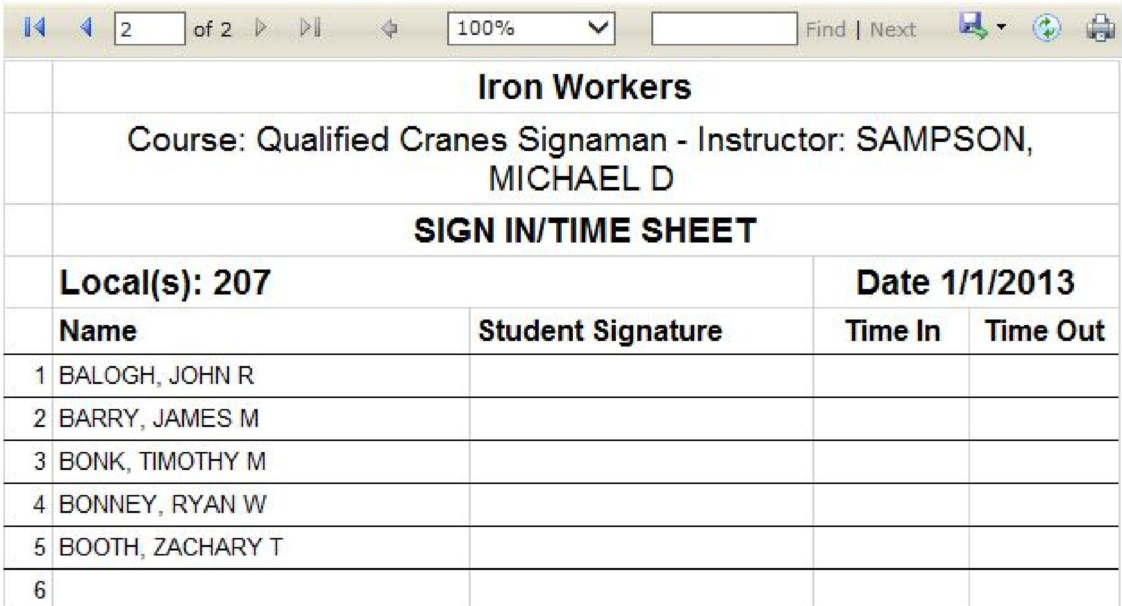
Course: Qualified Cranes Signaman - Instructor: SAMPSON, MICHAEL D

ATTENDANCE SHEET

Local(s): 207 — **Date 1/1/2013**

	Name	Class	Book	SSN	LU	Time In	Time Out
1	BALOGH, JOHN R	APPRENTICE	1447092	3906	207		
2	BARRY, JAMES M	APPRENTICE	1439605	0902	207		
3	BONK, TIMOTHY M	APPRENTICE	1436672	4189	550		
4	BONNEY, RYAN W	APPRENTICE	1403716	3571	17		
5	BOOTH, ZACHARY T	APPRENTICE	1439599	1901	207		
6							
7							
8							

and a sign in sheet for the members to sign. In this example, there are five class dates so clicking on 1/1, 1/31, 2/9, 2/23 or 3/1 will give you the attendance and sign in sheets for that day. I am going to click on 1/1 and show you an example of what you would see. The screen shot you see here shows page 1 of 2. Page 1 is the attendance sheet. Page 2 is the sign in sheet. Click on the arrow at the top left to go to the next page where you can view and print the sign in sheet.


2 of 2 100% Find | Next

Iron Workers

Course: Qualified Cranes Signaman - Instructor: SAMPSON, MICHAEL D

SIGN IN/TIME SHEET

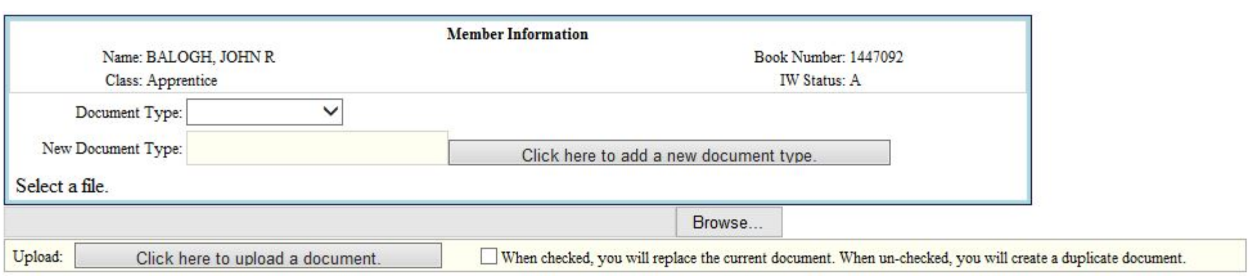
	Local(s): 207		Date 1/1/2013	
	Name	Student Signature	Time In	Time Out
1	BALOGH, JOHN R			
2	BARRY, JAMES M			
3	BONK, TIMOTHY M			
4	BONNEY, RYAN W			
5	BOOTH, ZACHARY T			
6				

3. The attendance sheet and the sign in sheet are provided for your convenience and should be printed and given to the instructor to use. **These sign in sheets are required to be used if you are using the ATS to print certification cards.** These pages will be returned to the ATS user to correctly fill out the attendance record and to upload the signed sign in sheets in the next steps. Close the sign in sheet window after you have printed the documents.

Add documentation for each member in a class

In order for a member to be eligible to take a particular class, that member may have been required to bring something with him to the class. Let's just say for example that a CPR certification was required to take this class. The member could provide his CPR certification to the instructor. The instructor could then scan or take a picture of the certification card and upload it into this course to show proof that member met all of the requirements.

1. Click on the '0' under the 'Docs' column. The '0' indicates how many documents are stored here for this member.
2. Click on 'Click here to add new docs for this member'. You will see a new window open similar to the one you see here.
3. Choose the 'File Type' that you are interested in collecting from the member. If the file type that

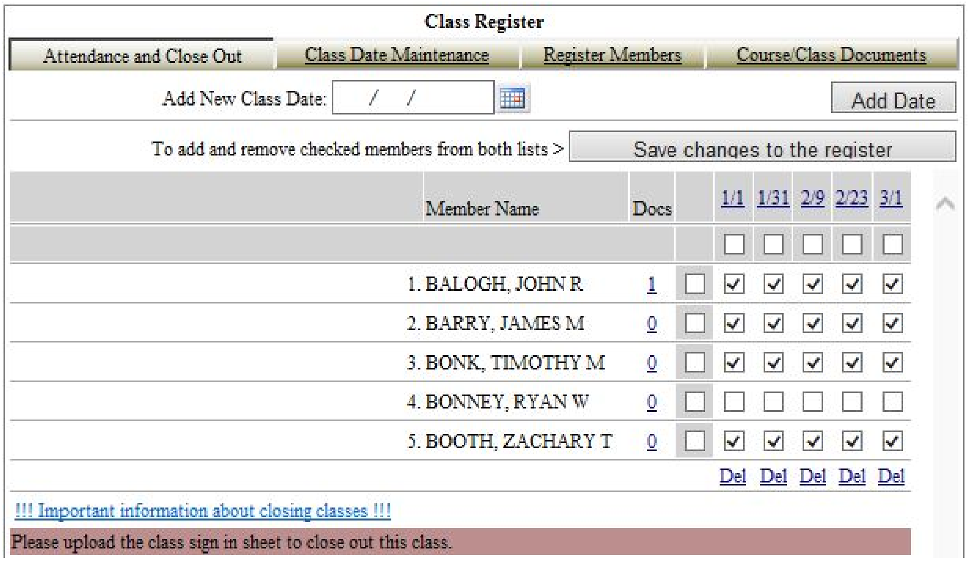

Member Information

Name: BALOGH, JOHN R
Class: Apprentice
Book Number: 1447092
IW Status: A

Document Type:
New Document Type: Click here to add a new document type.
Select a file.
Browse...
Upload: Click here to upload a document.
When checked, you will replace the current document. When un-checked, you will create a duplicate document.

you want is not shown in the list, add the new type in the 'New File Type' box and click on 'Click here to add a new file type'. Your new file type will now show up in the drop down box.

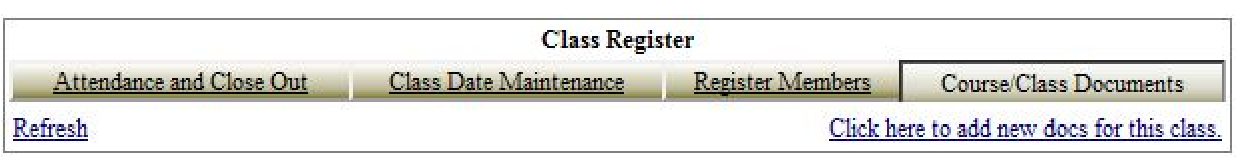
4. Choose the 'File Type' you want to use and then click 'Browse' to search for the document that you scanned or took a picture of.
5. Click 'Click here to upload a document' to upload that documentation to that member's record. As you can see in the screen shot, John Balogh has '1' document stored for this class.



Upload the class sign in sheets

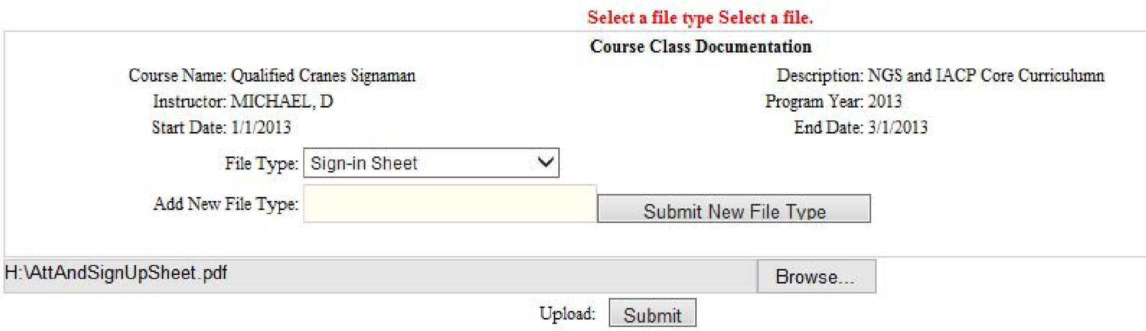
Looking down at the bottom of the screen shot you may have noticed a brown area that reads 'Please upload the class sign in sheet to close out this class.' **THIS STEP IS REQUIRED IF YOU WANT TO PRINT CERTIFICATION CARDS USING THIS SYSTEM.** In the past if you wanted to receive certification cards from the International you would need to send in your sign in sheets to the National Fund. You would then have to wait for the sign in sheets to be verified and the cards would be mailed to you. At that point, you would have to type in the names on each card that you wanted to issue. We are now providing a way to print the cards the same day that the class has ended provided you follow the steps in this document. If you would like to print your own cards using this system, you will need to contact Brian Caskey at the Ironworkers International office at 202-383-4872 or by email at bcaskey@iwintl.org prior to printing your own cards for the first time. Follow these steps to upload your sign in sheets to the system.

1. Click the tab entitled 'Course/Class Documents' to upload a class sign in sheet.



2. Click 'Click here to add new docs for this class'.

3. Choose the 'File Type' that you are interested in uploading. In most cases, this will just be 'Sign in Sheet'. If the file type that you want is not shown in the list, add the new type in the 'New File Type' box and click on 'Click here to add a new file type'. Your new file type will now show up in the drop down box.
4. Choose the 'File Type' you want to use and then click 'Browse' to search for the document that you want to upload.



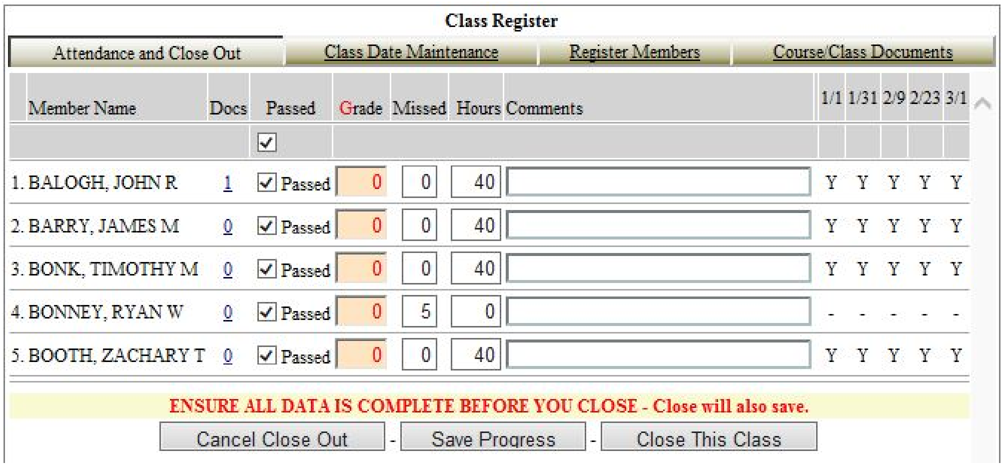
5. Click 'Submit' to upload the document. NOTE: If you have classes that span over multiple days, scan all of the sign in sheets in as one document and upload that single document. **Do not upload sign in sheets separately.**
6. Once you have completed the upload you can close this window by clicking the red X in the upper right corner.

The sign in sheets should have a signature of all members who were in the class for each day that the class was held. The National Fund will use the sign in sheet that you uploaded to verify that those members on the sheet are the same members that you printed the National Fund cards for. If you choose not to print your own cards, you can still upload the sign in sheets for your own records. After you upload the sign in sheets for your class, the International will receive a notification and will review your sign in sheet to be sure that the names on your sheet match the names for which you are printing cards. If the International finds that you are not following the rules, then your card printing privileges will be removed. You have the ability to overwrite a sign in sheet by uploading a new sign in sheet using the same 'File Type' as you did before. Once the International reviews the sign in sheet, you can no longer overwrite your previous sign in sheets.

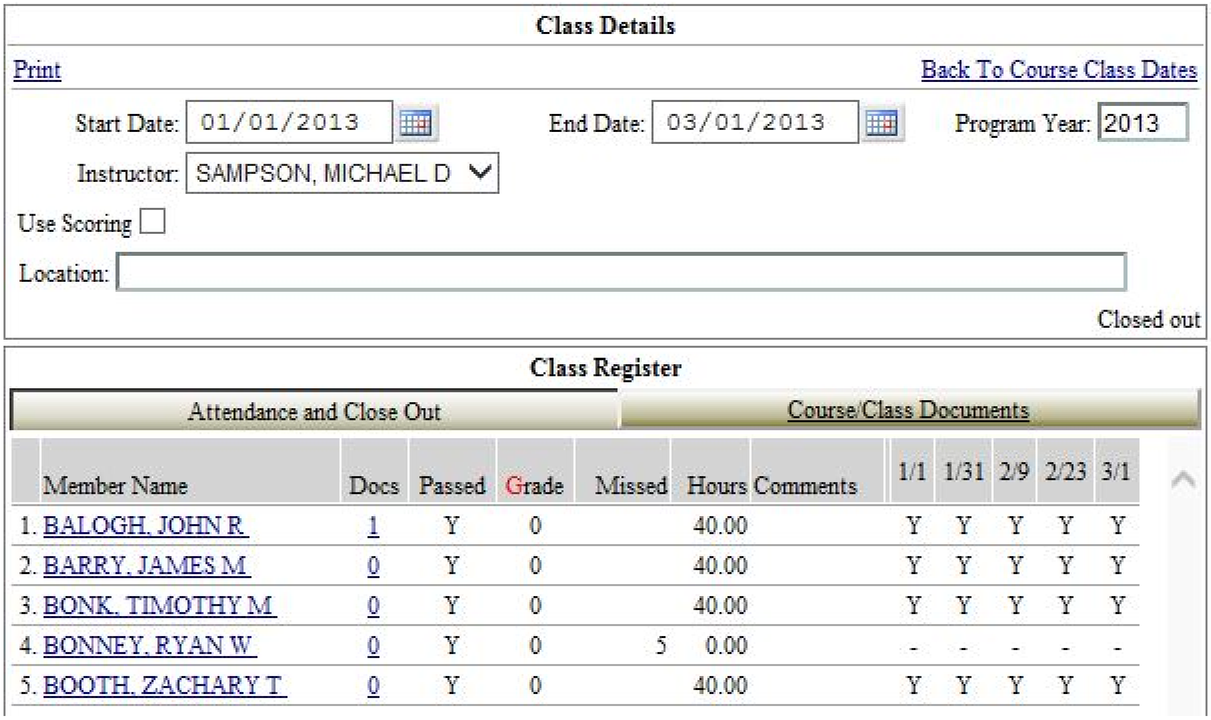
Close out a class

Now that all the information has been filled in for your class, it is time to close out the class and lock in the information. Notice that you now have a link on the bottom right corner to 'Close Out This Class'. You are not provided with this link until you upload the sign in sheet for the course. This is not the case if you are not printing National Fund cards. Before we close out this class, notice the line to the left of the link with the check box next to it. The line reads 'Do not calculate classes missed nor hours during close out'. The default option for this check box is to leave it unchecked. If you leave the box unchecked, the ATS will try to calculate the classes missed along with the number of hours a member should receive for that class from the check boxes that you have selected. This works great when you have a short class and are able to enter in all of the dates of the classes but if you choose to only use one date for the class for attendance, the ATS may not compute properly. It is in this case that you would want to check this box and calculate the missed classes and hours yourself on the next screen. I will show you a screen shot of what the next screen would look like if we left this box unchecked and if we chose to check the box.

1. Click the link to ‘Close Out This Class’. Assuming we left the box in the previous step unchecked (default), we would see a screen similar to the one we see here. As you can see there are some items here that are highlighted. This means that this member already has this class on his record and the information that you are entering does not match. If you choose to overwrite the data that is currently on his record with this new data then continue on to the next step.



2. If we chose to check the box in the previous step. The ATS would not try to calculate the number of hours that this member should receive for this course and it will automatically list whatever information is already on this member’s record for this class. (If you see highlighted hours and missed classes, you most likely have already added this class to this member’s record and don’t need to add it a second time.) Hovering the mouse over the highlighted areas will give you information on what the ATS feels is the correct data that should be in these boxes. These shaded boxes are just warnings and can be ignored if you choose.
3. After clicking ‘Close Out this Class’ you will need to fill in whether the members passed, their grades, and any comments that you might want to put on the their record. Note: Comments are put on a record to explain why a member was absent from a class and whether he was excused from that absence. Click ‘Cancel Close Out’ to return to the previous screen. Be sure to click ‘Save Progress’ to save any changes you may have made.
4. **ENSURE ALL DATA IS COMPLETE BEFORE TAKING THIS NEXT STEP. THERE ARE NO CHANGES AFTER THIS POINT.** Once you have filled in all of the necessary information, click ‘Save changes and close out this class’. After this point, this class is locked in and cannot be changed. You will have to contact Brian Caskey at 202-383-4872 if you have made a mistake and need to have the class re-opened.



Member Name	Docs	Passed	Grade	Missed	Hours	Comments	1/1	1/31	2/9	2/23	3/1
1. BALOGH, JOHN R	1	Y	0		40.00		Y	Y	Y	Y	Y
2. BARRY, JAMES M	0	Y	0		40.00		Y	Y	Y	Y	Y
3. BONK, TIMOTHY M	0	Y	0		40.00		Y	Y	Y	Y	Y
4. BONNEY, RYAN W	0	Y	0	5	0.00		-	-	-	-	-
5. BOOTH, ZACHARY T	0	Y	0		40.00		Y	Y	Y	Y	Y

5. Notice the ‘print’ option in the upper left corner of the screen. Clicking this link will open a class roster report for you to print in alpha order if you choose to do so. Clicking on any of the names of the participants in the class will view that member’s transcript. Close the window to return to this screen. You have now completed the steps for entering in the details of a class.

Superintendent Training for Ironworkers

IMPACT and the National Training Fund have published the new **Superintendent Training for Ironworkers** manual and are conducting a blended learning course based on the manual. The goal of this training initiative is to develop ironworker superintendents to meet the needs of our contractors and local unions.

During this blended learning course (combination of self-study, online exercises, and group-based training) the participants will learn the roles and responsibilities of the superintendent as well as how to manage project schedules, information, people, the job site and safety. Participants will also learn communication skills, how to close out a project, and basic construction finance and law.

This course is designed for ironworkers who have completed the Foreman Training course or have experience as a foreman, general foreman or superintendent. Individuals interested who have not completed the Foreman Training course are encouraged to do so before beginning this course.

There are two levels to this new course. The first level of training is available to all ironworkers and contractors. This level consists of self-study and the completion of online exercises through the new Ironworkers Online Learning Center.

Those completing level one (and who are then sponsored by their local union or employer) may attend the level two training, which is a three day group-based course. This group-based course will be offered in various locations in the US and Canada at the request of IMPACT Regional Advisory Boards (RABs) and District Council Presidents.

All course participants will be required to complete the level one training (reading the manual and completing the online exercises) before attending the group-based course. Individuals attending the group-based course are responsible for all travel costs (often through their sponsors).

The primary reason for this blended learning approach is that very few local unions would ever have the need to conduct a local course for superintendents. Therefore, the design includes self-study and (if sponsored) participation in the group-based course.

The content of this new manual includes:

- The roles and responsibilities of the ironworker superintendent
- Managing project schedules
- Managing information
- Managing people
- Managing the job site
- Managing safety
- Demonstrating effective communication skills
- Closing out a project
- Describing basic construction finance
- Describing basic construction law

How to Enroll in the Course

Ironworkers interested in enrolling in the self-study course will need to contact their local Apprenticeship Coordinator in early September. The Coordinator will order the manual from the Apprenticeship Department's online bookstore. The ironworker (depending on local union policy) may be required to pay for the manual.

The Coordinator will enroll the ironworker in the **Superintendent Training for Ironworkers** course using the Apprenticeship Tracking System (IWATS). The ironworker (**<u>who must have his or her own email address</u>**) will then receive an email with the instructions indicating how to access the online learning center and allow him/her to work on the online exercises. After completing the reading of the manual and online exercises, the ironworker will be able to print a certificate of completion.

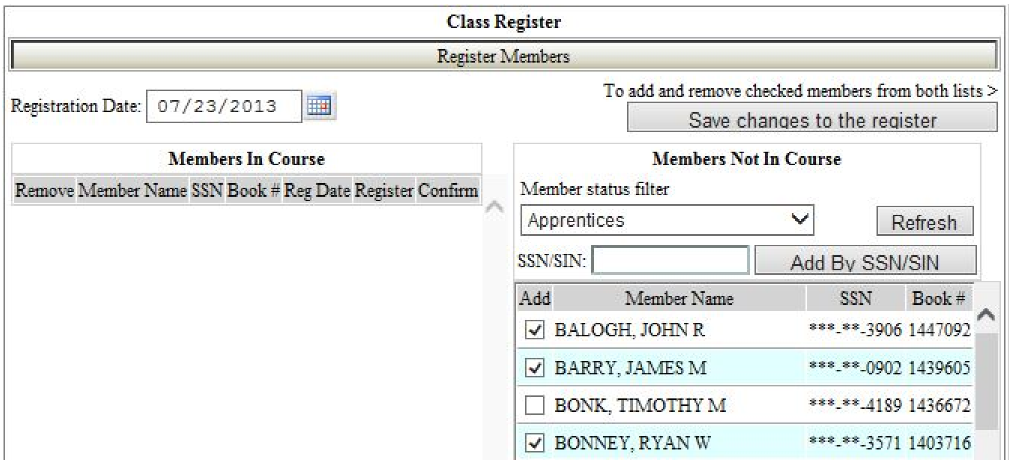
Follow these steps to enroll the ironworker in the Superintendent Training for Ironworkers course using the Apprenticeship Tracking System (IWATS).

1. Log into the Apprenticeship Tracking System (IWATS)
2. Navigate to 'Admin' using the top menu.
3. Navigate to 'Courses' using the left side menu.

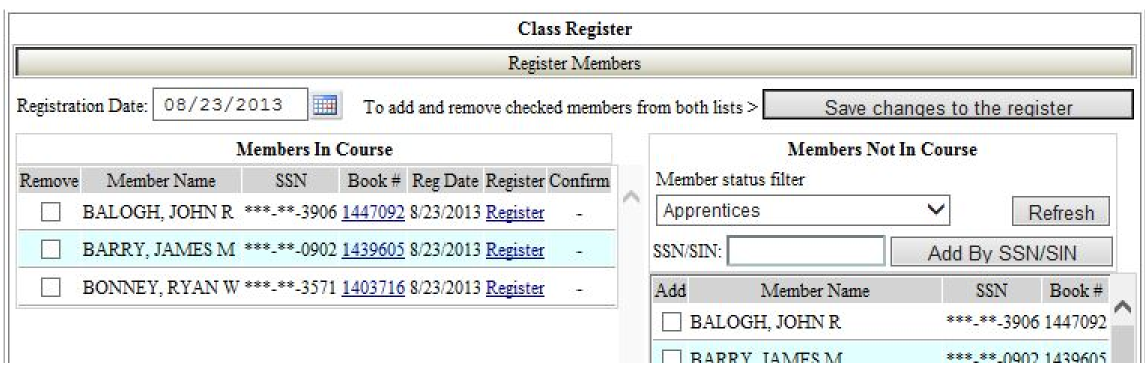
4. A default course named **'Superintendent Training (Level 1 – Self Study)'** has been added to your list of courses. The course ID is **'LMSST'**

LMSST	Superintendent Training (Level 1 - Self-Study)	- Level 1 - Online	-	-	-
LMSST2	Superintendent Training (Level 2 - Group Course)	24 Level 2 - Group Course	0	0	0

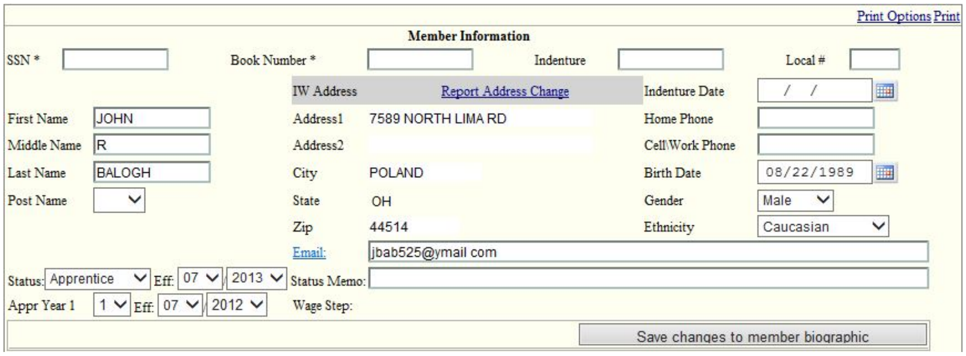
5. Click on the course name to begin registering members into the Superintendent Training for Ironorkers course.
6. The list is in alphabetical order by last name. Place a checkbox next to each name for whom you would like to register into this class. Once you have chosen all of those members who are



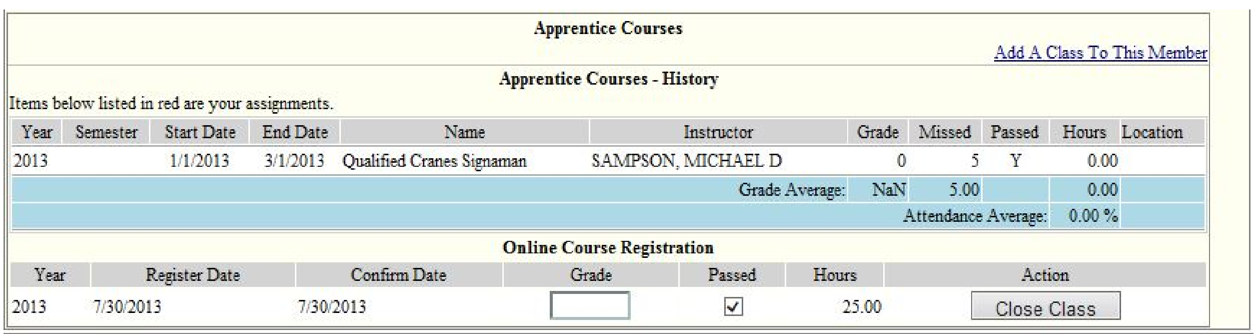
currently registering for the class, click 'Save changes to the register'. The members that were checked should now be displayed on the left side of the screen as you can see in the screenshot below.



7. Members can be removed from the list by placing a checkmark in the box to the left of the member and then clicking 'Save Changes to the register'.
8. Note: Every member registering for this course MUST have a valid email address entered into his or her profile. To add an email address, navigate to 'Member' using the top menu. Locate the member for which you would like to add an email address and click on that member. You will see a screen similar to the one you see here. Enter a valid email address in the text box labeled 'Email:'. Be sure to click on 'Save Changes to member biographic' before you go back to 'register' this member in the course.



9. Now that you have verified that there is a valid email address for each member, click on the link labeled 'register' for each member. You should now see a date under the 'Confirm' column. The tracking system confirms that the member was registered properly. If the tracking system does not confirm with a date then your member will not receive the email that he needs to take the online class. Call Brian Caskey at 202-383-4872 for technical support at this time. The most common problem that you will encounter is that a member may not have a valid email address added to his record.
10. When the member is confirmed, that member will then receive an email with instructions on how to access the Online Learning Center to complete the course.
11. When the member completes the online course, he will be able to print off a certificate of completion. This certificate needs to be brought back to the coordinator so that the member can be marked as complete in the tracking system. The coordinator would locate that members' record and pull up 'Apprentice Courses' located on the left hand side. See example here:



The coordinator needs to mark the record as passed and hit the 'Close Class' button. The grade field is optional. Click here for directions on how to upload the certificate into the member's documentation. These steps needs to be done for each member who completes an online course.

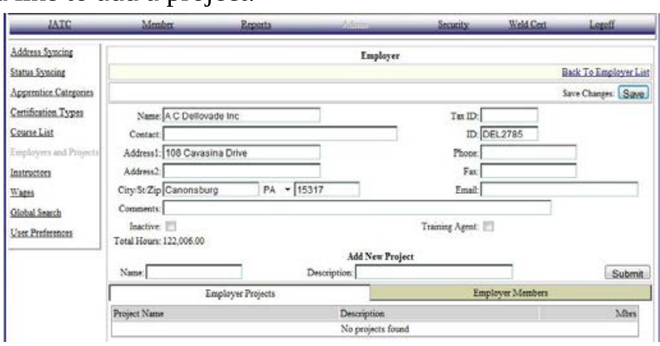
Note: It is a prerequisite that a member MUST complete the level 1 Superintendents course before that member can be enrolled into the level 2 Superintendents course. The level 2 course is entered into the system the same way you would enter any other course. Click here for directions on setting up a course in the IWATS.

Employers and Projects

This section of the system is not preloaded for you unless you have made arrangements to provide us with your trust fund information on a periodic basis. You will need to enter all of your employers and their associated projects in order to track field experience.

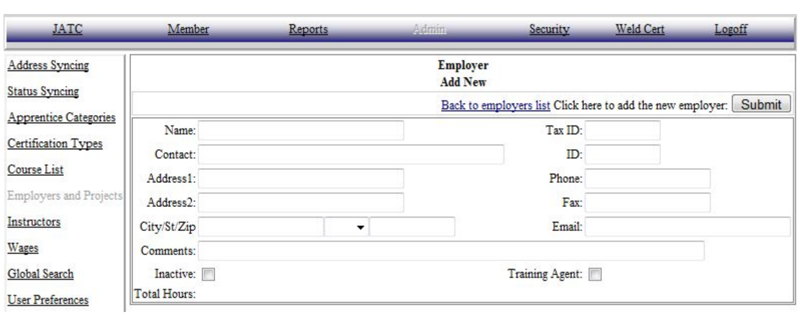
Add a new project for a current employer

1. Navigate to the ‘Admin’ tab on the top menu.
2. Choose the ‘Employers and Projects’ option on the left side menu.
3. All employers that have been added to the ATS will show up here. Choose the employer for which you would like to add a project.



4. Under the ‘Add New Project’ heading, fill out the name of the project and a description of the project.
5. Click ‘Submit’ to add the project. Note: Select a project from the list of projects and choose ‘Delete’ to remove a project from an employer.
6. Repeat steps 4 and 5 for additional projects or select ‘Back to Employer List’ to return to the previous screen listing your employers.

Add a new employer



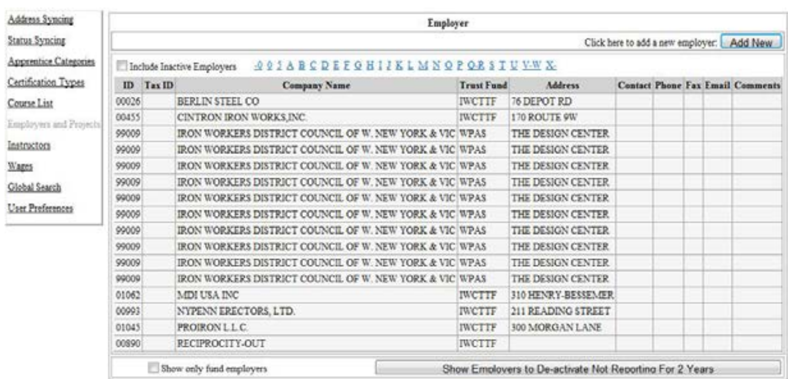
1. Navigate to the ‘Admin’ tab on the top menu.

2. Choose the 'Employers and Projects' option on the left side menu.
3. All employers that have been added to the ATS will show up here. Click 'Add New' to add a new employer to the list.
4. Fill out all of the appropriate information about the employer for which you wish to add.
5. Click 'Submit' to add the new employer.

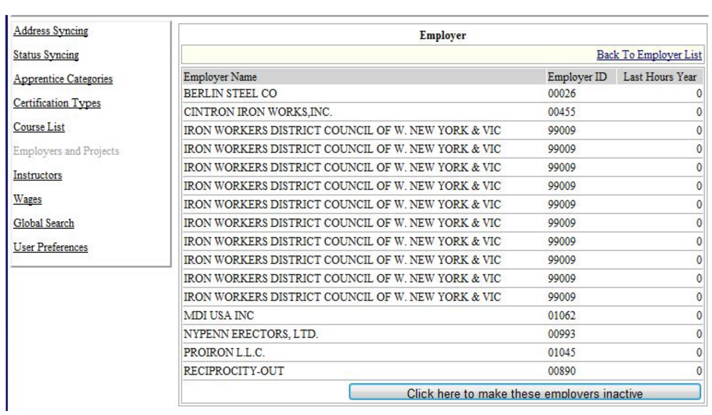
De-Activate Employers Not Reporting

Over a period of time your list of employers will grow quite large. Displaying all of your employers may not be necessary and will clutter your system with information that does not concern you. An option has been added to de-activate all employers who have not reported any hours for two years. Choosing this option will not delete those employers, it will only place them on an inactive list. Inactive employers can be returned to the active list at any time you choose.

1. Click 'Show Employers to De-Activate Not Reporting For 2 years'.

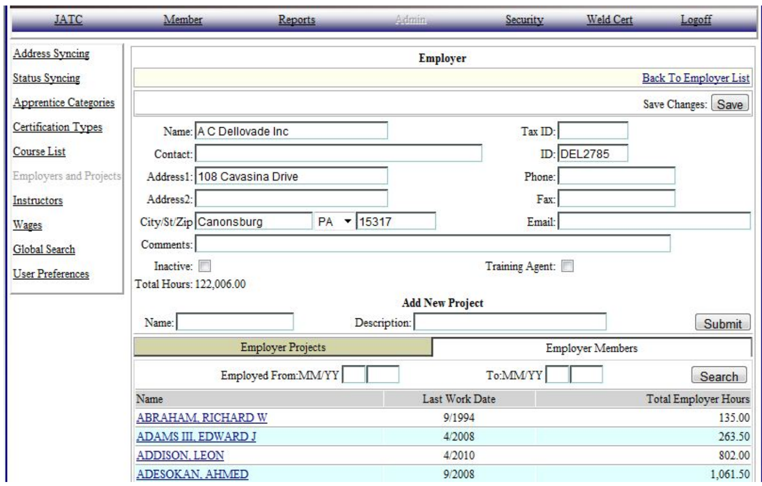


2. You will be shown a list of all employers who have not reported for two years. Click 'Click here to make these employers inactive'. Those employees will be removed from your active list.



List all members who have worked for an employer

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Employers and Projects' option on the left side menu.
3. All employers that have been added to the ATS will show up here. Click on the employer for which you want to know what members have worked.
4. Your initial screen will show the 'Employer Projects' listed for this employer along with the number of members who have worked for this employer. Click on the tab to the right called 'Employer Members'. You should now see a list of all members who have worked for this employer along with the last worked date and the number of hours recorded.

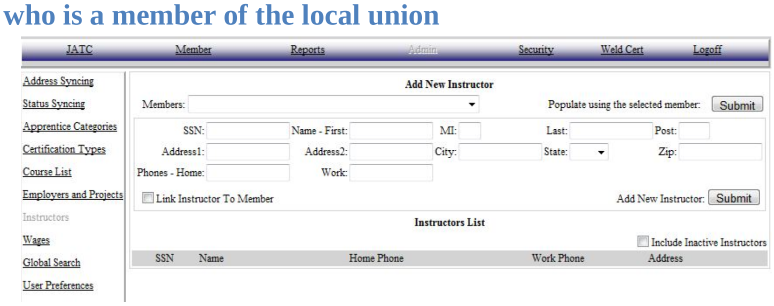


5. Click on any of the members in the list and a new window will open providing you with a complete list of that member's employment history.

Instructors

This is where you will add any instructor who will teach any class that is provided by your JATC. Any instructor that you have added to the tracking system from the 'Add New' member area will be listed for you in the drop down box at the top of the 'Instructors' section. If you are adding an instructor who is not a member, simply fill out the information manually and click on 'Submit' to add that instructor to your list. Instructors listed in this area will be used later when entering members into classes.

Add an instructor who is a member of the local union



1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Instructors' option on the left side menu.
3. Under the 'Add New Instructor' heading, click the members drop down arrow and select a member from the list. Note: Only members that you have added to the system through the

'Add New' process will show up on this list. If your instructor is not on the list, you will need to add that member to the system through the 'Add New' process.

4. After you have chosen your instructor from the drop down list, click on 'Submit' to the right of the drop down box.
5. All of the information should instantly be filled in for you saving you the time of typing this information into the system. If you approve of the information shown, click the lower 'Submit' button to add that member as an instructor.
6. Repeat these steps for all instructors who are members of the union.

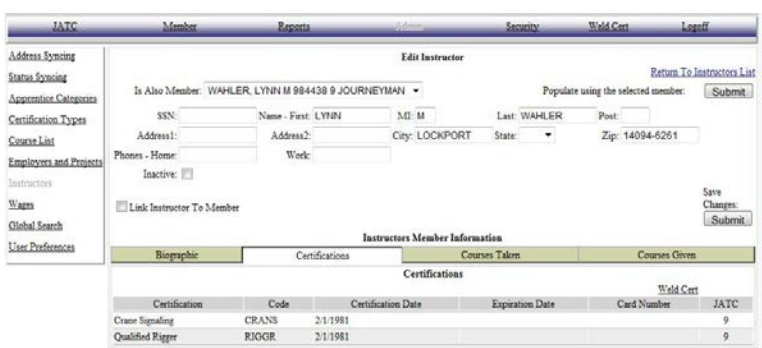
Add an instructor who is not a member of the union

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Instructors' option on the left side menu.
3. Manually type in the information for the instructor.
4. Click the lower 'Submit' button to add the new instructor to your list of instructors.

Verify the qualifications of an instructor

At some point you may want to verify the qualifications of an instructor to be able to teach a class that you are providing to your members. You can do this by following the steps below.

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Instructors' option on the left side menu. You should now see a list of all instructors that you have previously added to the ATS.
3. Click on the instructor that you would like to view.
4. Notice the drop down box at the top of the screen. If the box is blank and this instructor is a member of the Iron workers union then you will need to find this instructor in the list. Click on the drop down box to locate this instructor. If you are unable to find this instructor in the list then you will need to add that member to the ATS. Directions to do this can be found in the 'Add New' area of this manual.
5. Click 'Submit' when you have found this instructor in the drop down list.
6. Now that this instructor is linked to his member record, you are able to see the four tabs from which you can verify that instructors qualifications. The first tab you see will show the



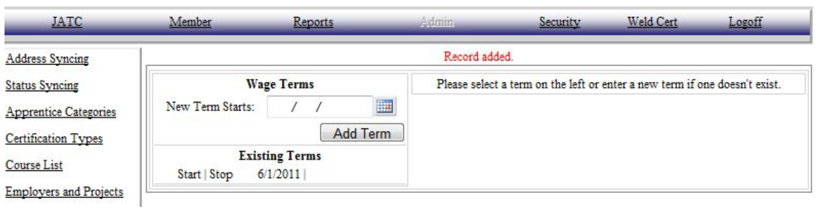
certifications that this instructor has. Clicking the next tab to the right will give you a list of the courses that instructor has taken. Clicking the last tab to the right will show all of the courses that this particular instructor has taught. Clicking on the first tab to the left will show that instructors biographical information.

Mark/Find instructors who are inactive

1. Navigate to the 'Admin' tab on the top menu.
2. Locate and click on 'Instructors' on the menu to the left.
3. Click on an instructors name to mark an instructor as inactive.
4. Check the box next to the 'Inactive' label and click 'Submit' to save that instructor as inactive.
5. Under the 'Instructor's List' heading, click the checkbox next to the 'Include Inactive Instructors' label.
6. The list of instructors will update and display the names of both inactive and active instructors.
7. Uncheck the box to view only active instructors.

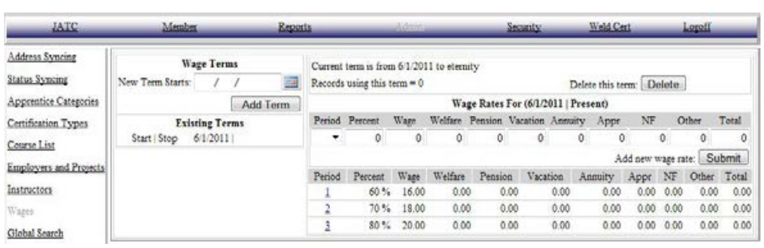
Wages

This section maintains the wage scale for your local. This information will be used to allow you to track wage increases for apprentices in another section of the system. This section must be completed in order to use the apprentice wage increase feature and reports.



Add/edit/delete a wage scale

1. Navigate to the 'Admin' tab on the top menu.
2. Choose the 'Wages' option on the left side menu.
3. If you have already set up a wage term, choose your term from the 'Existing Terms'.
4. If you have never set up a wage term or you need to add a new term, enter the date of the term and click the 'Add Term' button.
5. Your new term will now show up under 'Existing Terms'.
6. Click on the term to make changes to an existing scale or to add information for a new wage scale.



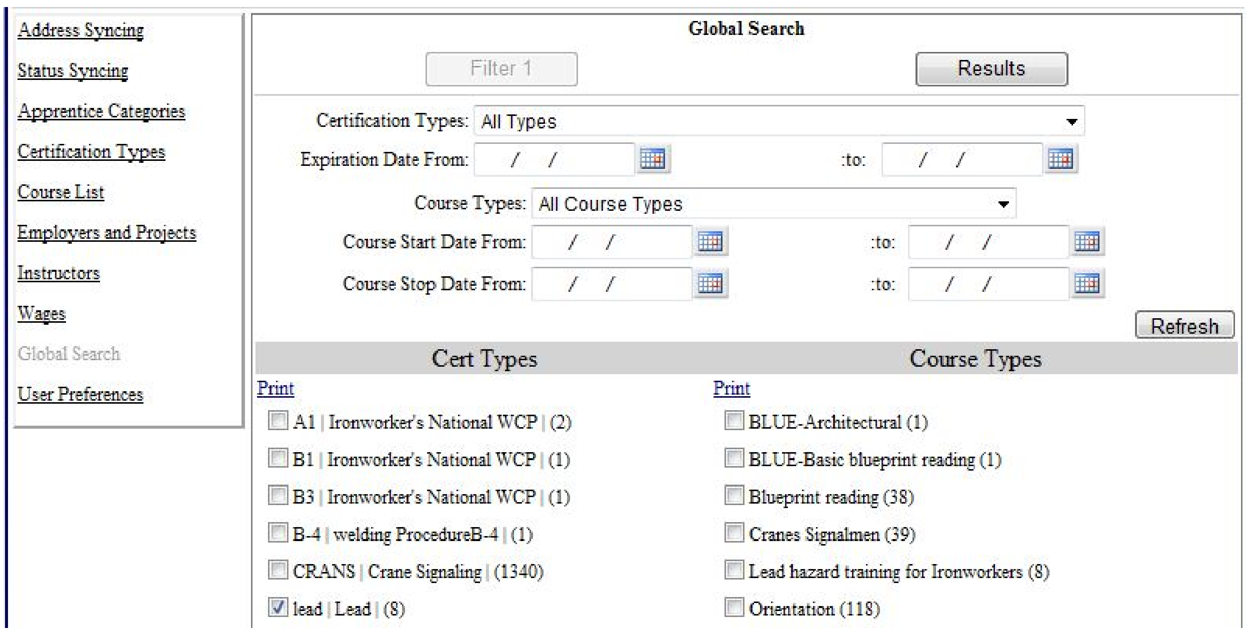
7. Enter all wage periods along with the information that corresponds with that wage scale package.
8. You must hit 'Submit' after entering information for each wage scale period.
9. You have the option to remove a wage term if you need to do so. Choose the wage term that you would like to remove and click on the 'Delete' button.
10. When the time comes that there is a new wage scale, you will need to create a new term with the dates of the new wage scale package. In doing this you will ensure that members will retain the history of the correct wage scale information that was in place at the time of their apprenticeship.

Global Search

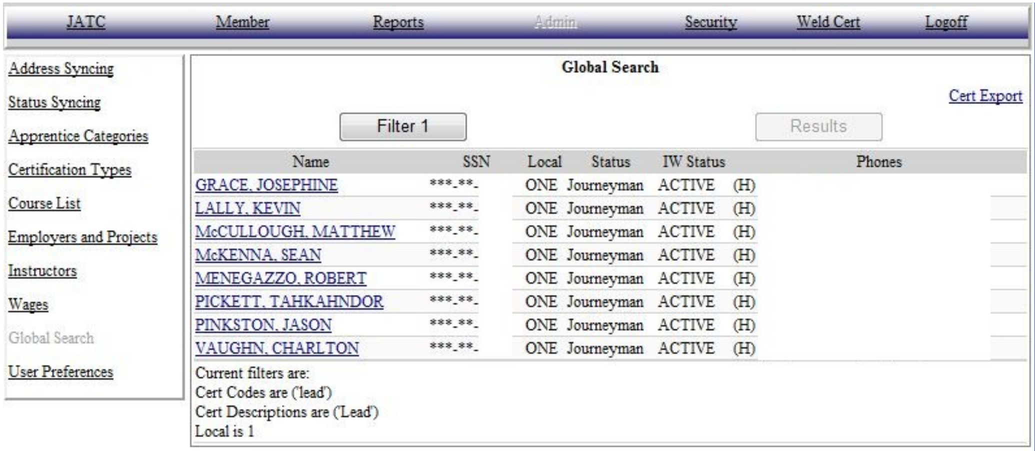
The 'Global Search' feature allows you to search for members with specific certification types and course types. All of your local's certifications and classes entered in the 'Admin' tab will be listed with a count of the number of members who have the certifications or who have taken the courses.

Search member records for certifications/course information

1. Navigate to the 'Admin' tab on the top menu.
2. Locate and click on the 'Global Search' option on the left side menu.
3. Click the drop down arrow and select a type of certification that you want to search for. In my example, I have chosen to see a list of 'all types' of certifications. Note: You can also search for classes in the same way. In my example, I am also searching for all courses to get a list of how many members have taken each course.



4. Click 'Refresh' and your system will search through all of your records and provide a list similar to the list you see here.
5. Note the number that follows the certifications and course types. These numbers indicate the total number of members with that certification or that took that course who are either active or expired. Enter in dates above and 'Refresh' to list only those members who have active certifications.
6. To see which members have the certifications, click the checkbox next to the certification type. In my example, I am going to view the members who have the 'Lead' certification.
7. Click the 'Results' button. Your system will display a list of members who have the qualification you specified in the previous step.
8. Clicking on any of the names will open a new window which will act as a transcript for that particular member. As you can see, the demographical information is displayed along with all courses taken and certifications attained.



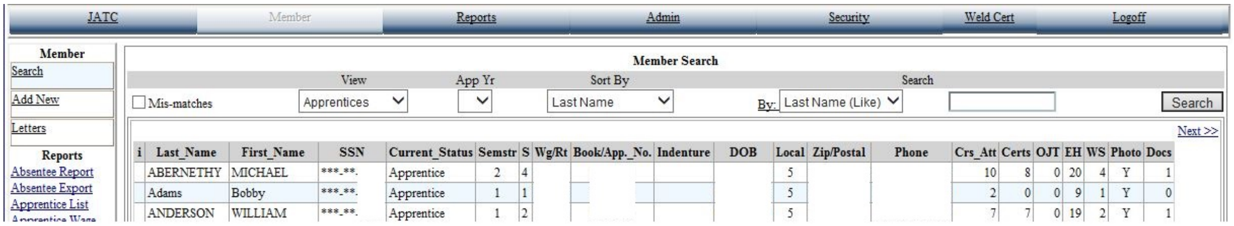
9. You have the ability to export this information to excel if you choose to do so. This will allow you to print the information on certification cards using Microsoft Word and mail merge. Click the link labeled 'Cert Export' in the top right hand corner of the screen.
10. Choose a format for which you would like to export the information. The three choices are Microsoft Word, PDF, and Microsoft Excel. Choosing Excel will allow you to create a mail

merge using Microsoft Word so that you can create certification cards. Close this window to return to the previous screen.

User Preferences

Users may select additional information to display on the 'Member' tab located on the top menu. This feature is helpful to identify how much information is available on an individual. These are:

1. Show Counts
2. Cert Counts
3. Course Attendance
4. Employment History
5. OJT
6. Show Semester
7. Wage Steps



This image shows an example of what the 'Member' area would look like if you turned on all of these 'user preferences'. Notice the columns on the right side shows the number of courses attended, certifications, OJT hours, employment history hours, and wage scale.

Security

This feature enables you to create user accounts so that other members within your school can access the ATS. You can control the security users have to information by customizing permissions for each user.

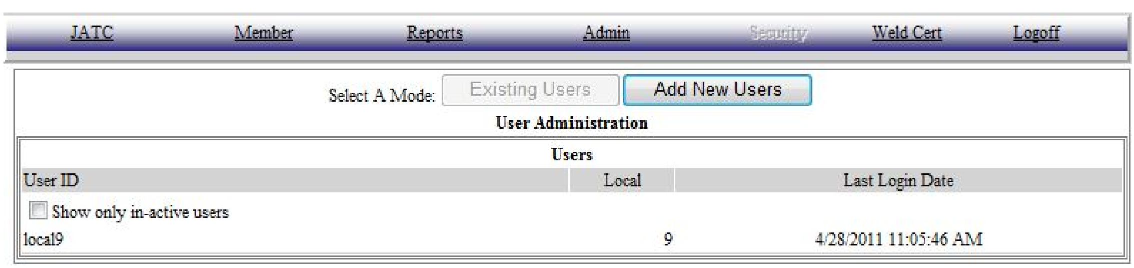
Understanding Permissions

Depending on which zones are checked, what the user will see on the screen and which functions they can perform will be different. For example, if a user's account had the 'Add' functions 'unchecked', then he or she could not add data to the ATS and the add functions would not be displayed when they are logged in. If a user can 'Write' (change) data then the 'Submit' buttons will be displayed for their use. When a category is completely unchecked then the entire category will not display when the user is logged in. This area controls the screen configuration and what the options the user will see and what functions can be performed by that user.

1. Read – Enables user to see data
2. Write – Enables user to change data
3. Add – Enables user to add functions to the ATS

Create user accounts and assign permissions

Creating user accounts and assigning permissions to the ATS is a simple process. It is important to note that users must remember their answers for their security question and security answer as his information



will be used if the user forgets his or her password. Follow these steps to create a new user:

1. Click the 'Security' tab from the top menu. Note: Under the 'Users' section you will see a list of all your users who have been added. In this example there is one user currently setup called 'local9'.

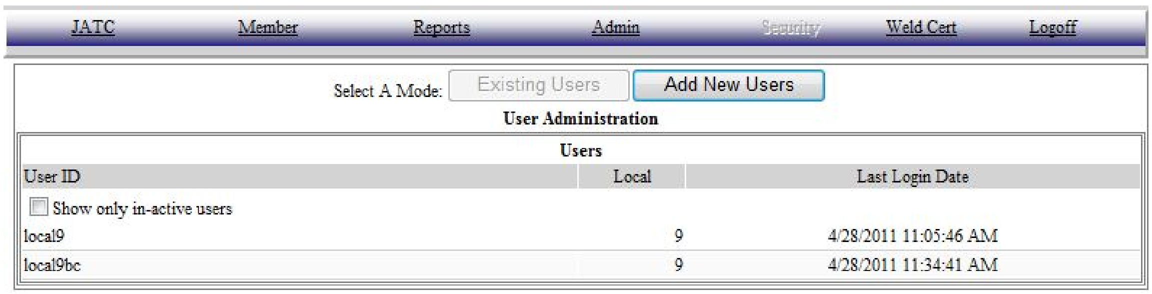
2. Click 'Add New Users' to begin the process of creating a new account.

3. Complete all the required fields.
   a. User Name – It is recommended to use a standard format when creating accounts or users. For example, create a user name by including your local's number and the user's initials. For example: local9bc
   b. Password – This is the password that will be used the first time the user logs on. The user will be forced to change this password when logging in the first time. It is recommended to use a standard password for new user accounts. This will help eliminate any confusion over forgotten passwords when assigning a password for new accounts. For example, you could use **password.** as a standard password for new accounts. Notice that it includes a period (.) at the end of the word. Passwords are case sensitive. Follow these rules when creating passwords:
      i. Must contain at least six characters
      ii. Must use at least one non-alpha character (e.g. !, $, #, %,.)
      iii. Use characters from three of the following categories: Uppercase (A-Z), lowercase (a-z), digits 0-9, non-alpha characters (e.g. !, $, #, %)
   c. Confirm Password - You will be required to re-enter the password you chose.
   d. E-mail – Enter in the email address of the user. If the user forgets his/her password the system will email the password to this address.
   e. Security Question – Choose a question that only the user would know the answer to. The user will have to answer this question in order to have his/her password sent to his/her email address.
   f. Security Answer – Enter in the answer to the security question.
4. Click 'Add User' to create this new user in the system.

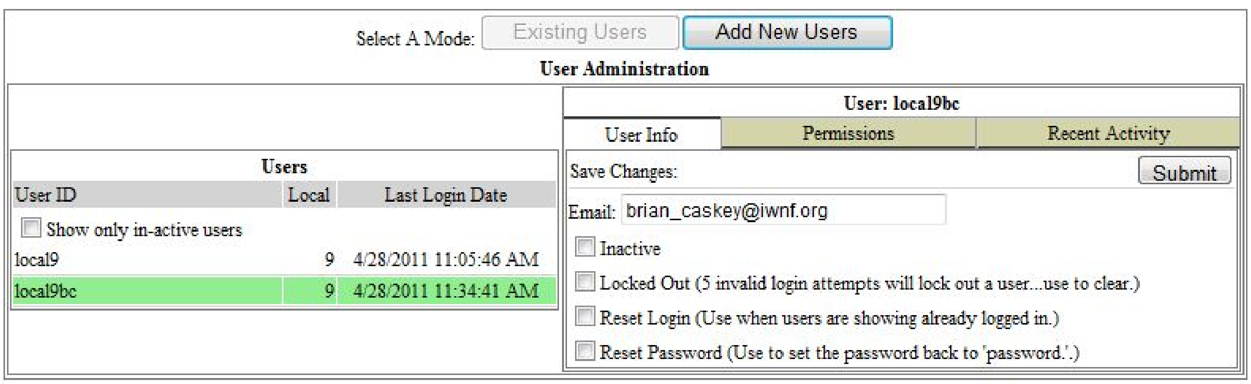
Assign or change permissions to a user account

Once you have created your user accounts for the ATS, you will then need to set permissions on what you want those accounts to be able to see and do. Some accounts will need permissions to all areas of the system where other accounts may only need access to a particular section. You also have the ability to create a read only account so that a user could login and view everything in the system but have no ability to add or change anything. It is in this way that you will keep your data safe. Follow these steps after you have created a user account to set permissions on what that account has the ability to see and do in the system.

1. Click the 'Security' tab from the top menu. Note: Under the 'Users' section you will see a list of all your users who have been added. In this example there are two users currently setup called 'local9' and 'local9bc'.



2. You can edit permissions for those that have been setup in the past or set permissions for those that have just been set up. Click on the 'User ID' that you would like to set permissions.

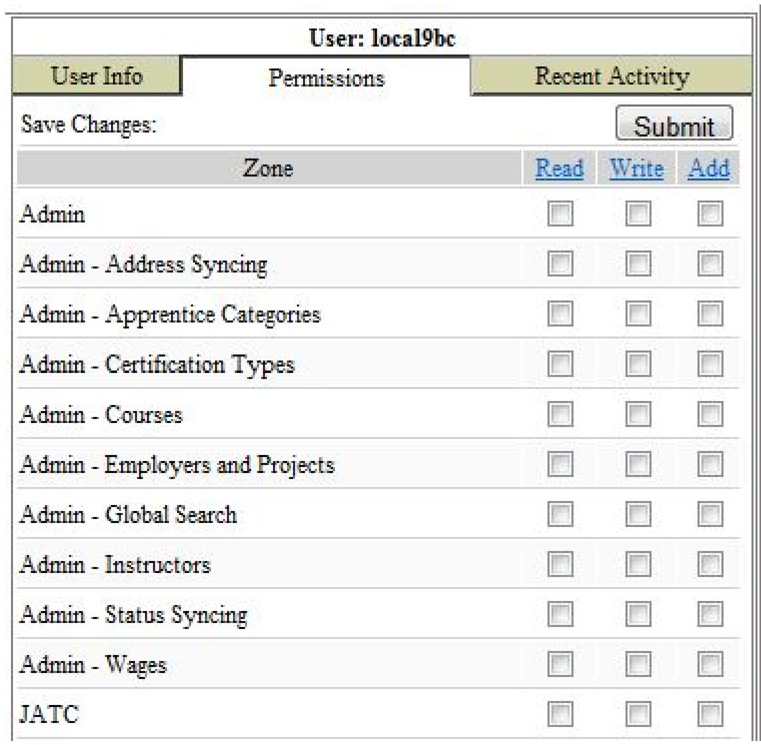


3. All of your users will be displayed on the left. The user that is highlighted is the user for which you will be changing the settings.
4. On the right you will see the email address which was entered when this user was created. If you choose to edit this email address, be sure to click 'Submit' to save your changes.
5. Notice the options below the email address.
   a. You have the ability to mark a user account as 'Inactive'. This should be done if the user account will no longer be used.
   b. When a user enters in a wrong password five times, his account will become locked out. The only way to unlock an account is for another user with access to security to login to the system and uncheck this box on the user account that has been locked. Be sure to click 'Submit' to save your changes.
   c. If a user closes out of the system without clicking on 'Logoff', that user account will need to be reset. If the user enters in there user name, password, and email address that corresponds with the information that is in this system, that account will then be reset allowing the user to login. If the user does not know what email address is associated

with his account then another user with access to security can login to the system and check this box on the user account. Be sure to click 'Submit' to save your changes.

   d. The last option is to 'Reset Password'. Checking this box and clicking on 'Submit' will reset a password back to 'password.'. The user can then login using this password and will be forced to change the password to something only that user would know.

6. Click on the 'Permissions' tab to set permissions for this user.



7. When a user is first created, that user does not have permissions to do anything. You will have to come to this location and check the boxes to allow the user the writes to read, write, and add. If you want a user to have full permissions to every function within the system then click on the 'Read' header, 'Write' header, and 'Add' header and all the boxes will be checked. If you want to restrict a user's access to certain areas then click on the boxes again to uncheck the box. Be sure to click 'Submit' to save your changes. Note: If you give a user access to 'Security' that user can reset their own permissions. Only give access to 'Security' to those that should have full access to the system.

Weld Cert

The ATS provides a link to the 'Welder Certification Program'. If a member has a welding certification, then you can see the certification details by clicking on the welding cert link in the members' record.

Logoff

To exit the ATS, click the 'logoff' link to terminate your session properly.

Glossary of Terms

1. **Active** – A current member who is no more than five months in arrears with respect to that member's dues payments.
2. **Deceased** – A previously active member who has died. Status for deceased inactive (i.e. suspended, etc.) members does not change.
3. **Expelled** – Member was removed from active membership because of some serious infraction.
4. **Forfeit Out** – Only for Shop members – applicant did not pay his total initiation/reinstatement fee amount within six months. She/he was rejected for membership.
5. **Inactive** – Generic status for any non-active member. This status is maintained in historical records only.
6. **Pending Initiation** – Current initiation applicant waiting for HQ approval.
7. **Pending Reinstatement** – Current reinstatement applicant waiting for HQ approval.
8. **Restricted** – Former member who is flagged due to a special situation that has occurred. If he/she ever applies for membership in the future from any local union, special attention will be required before the member is approved for reinstatement. This may occur because the last local union in which that person was member felt that this person should not be able to obtain future membership.
9. **Revoked** – Only applies to apprentices. They can be removed from active membership for non-payment of dues or violating the terms of the apprenticeship program.
10. **Suspended** – A member (other than an apprentice or lifetime member) is suspended for non-payment of dues. He/she will be suspended after not paying dues for six months.
11. **Terminated** – Only probationary members are terminated either at the request of the local business manager or if the member wishes to transfer out of the current local and work in another. In this case, he would terminate in his current local union and reinstate in another local union.
12. **Transferred Out** – Member has transferred from one local union to another. This status is not applicable in the HQ system since after the transfer is complete, he becomes 'Active' in the new local. It applies to the local union system when a member transfers out of that particular local.
13. **Withdrawal Card Issue / Deposit** – A member who does not wish to continue working in the trade, but wants to leave in good standing. A member who is on 'Withdrawal' no longer pays dues. If that member decided to return to work, a 'withdrawal card deposit' is requested and after paying a fee and dues payment and after HQ approval, that member will become an active dues paying member. Seniority will start over on the date of the deposit.
14. **Applicant** – An individual applying for entry to an apprenticeship program based on standard eligibility rules.
15. **Apprentice** – A member who is enrolled in an apprenticeship training program.
16. **Honorary** – Only for outside local unions – For a member who no longer can work in he trade, but does not meet the requirements of lifetime member.
17. **Lifetime** – Only for outside local unions, a retired Ironworker.
18. **Military** – A previously active member who is now in the military.
19. **Pensioner** – Only for Shop local unions, a retired Ironworker.
20. **Probationary** – Only for outside local unions, an Ironworker who pays no entrance fee, but pays dues at an apprentice rate who, within one year, is required either to upgrade to an apprentice or journeyman. During the 'probationary' period he must upgrade or be terminated. Will be suspended if dues are more than five months in arrears.

21. **Trainee** – Only in outside local unions, similar to a 'probationary' member, but without the time restriction. Pays an initiation/reinstatement fee and dues and eventually will be upgraded to an apprentice or journeyman. Work duties are usually similar to an apprentice, but with a lower pay rate.

Support

If you encounter a problem using the Online Apprenticeship Tracking System, please contact Brian Caskey at the National Fund office at (202) 383-4872.

You can mail or email any comments about the tracking system to:

Ironworkers National Fund
1750 New York Ave, NW
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Washington, DC 20006
Email: atssupport@iwintl.org