01. What is the Participant Role?

The participant's role is to attend a program and submit evaluations on leaders and the programs they attend. The participant will only have access to create evaluations for the program and the leaders.

How do I access the database and create evaluations? -->

02. What is the Admin Role?

The admin role is anyone who has access to the hidden areas of the database, those who can click the "admin" button and access the back end of the database. This includes the raw data for creating reports, maintaining the reports, and maintaining the keywords.

How do I create a report? -->

How do I forward a report when finished? -->

What security mechanisms are in place for the evaluations? -->

How do I export a view? -->

How do I create keywords? -->

How do I update keywords? -->

How do I delete keywords? -->

03. How do I access the database and create evaluations?

Open Lotus Notes

1) Sign in to Lotus Notes
   - If any participant does not have a Lotus Notes ID, have your TSS support person assist them.

Setting-up the LRG Icon

2) Click **File** on your menu bar
3) Go to **Database**, then **Open**
4) The LRG is located on the following servers, have the participants **use the server farm closest to your work location**:
   EY055 or EY056 (Meadowlands, NJ)

   EY209 or EY211 (Atlanta, GA)

   EY305 or EY307 (Chicago, IL)

   EY401 or EY403 (Cleveland, OH)

   EY500 or EY503 (Dallas, TX)

   EY605 or EY616 (Los Angeles, CA)

   EY700 (Washington DC)
5) Double-click on the *Firmwide* folder
6) Double-click on the *Learning Resource Guide*

Accessing the Evaluation Database

Once the LRG icon is on your LotusNotes desktop you can access the Evaluation Database by:

1) Clicking on the ***Browse*** button in the LRG
2) You may either scroll through the program list to the program you would like to fill out the evaluation for or; begin typing the program name and hit **Enter**
3) Double-click on the appropriate program
4) Click on the ***View Materials*** button
5) Use the following table to guide you to the appropriate server farm closest to your work location; double-click on the appropriate link:

Mail0## then use EY0## (Meadowlands, NJ)

Mail2## then use EY2## (Atlanta, GA)

Mail3## then use EY3## (Chicago, IL)

Mail4## then use EY4## (Cleveland, OH)

Mail5## then use EY5## (Dallas, TX)

Mail6## then use EY6## (Los Angeles, CA)

Mail7## then use EY7## (Washington DC)

Completing the Evaluation

Program Evaluation

When filling out the program evaluation, consider the following:

- Program—**Must** reflect the program you have attended
- Program Date—**Must** reflect the date of your session
- Program Location—**Must** reflect the city where the session is being held
- Level—**Must** reflect your current staff level

If these areas are not filled out you will not be able to submit your evaluation.

If you would like to change a specific response before submitting your evaluation, you may change any response by simply clicking on another option from 4-NA (before submitting your evaluation).

You will only be able to submit one program evaluation per session.

Leader Evaluation

The Program, Program Date, Program Location, and Level information should be the same as completed for the Program Evaluation (see reference above). If these fields are not completed you will not be able to submit your evaluation.

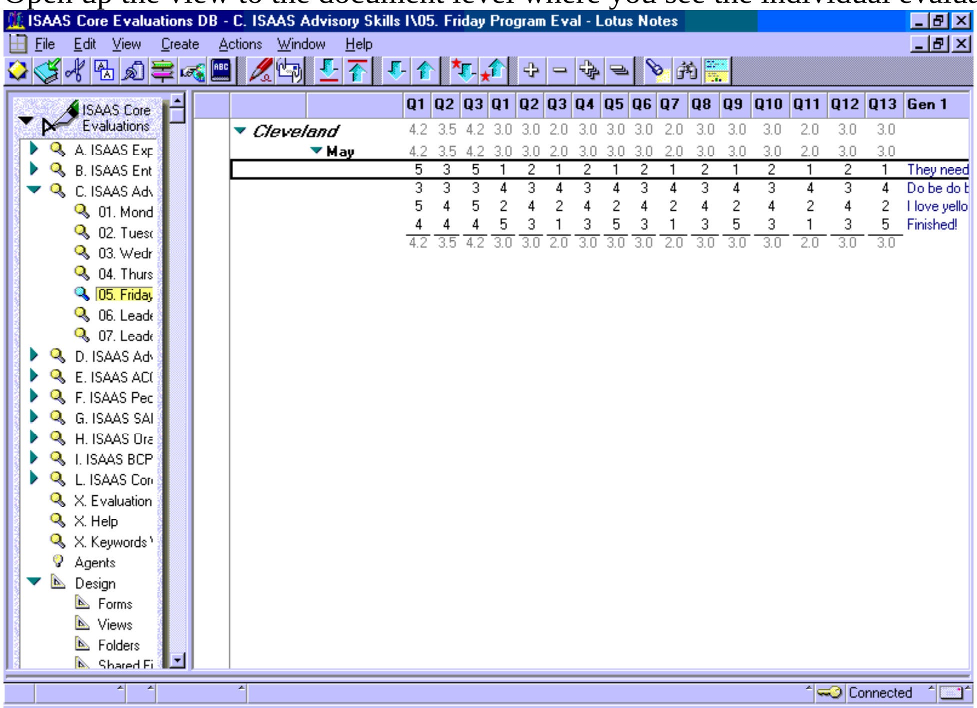
Identify the leader names as follows:

- Each leaders evaluation must be filled out and submitted separately (e.g., input Leader A's: name, ratings, and written comments, hit submit, then move on to Leader B)
- When filling in leaders names, it is important to select the correct name. If this field is not filled out, you will not be able to submit your evaluation.

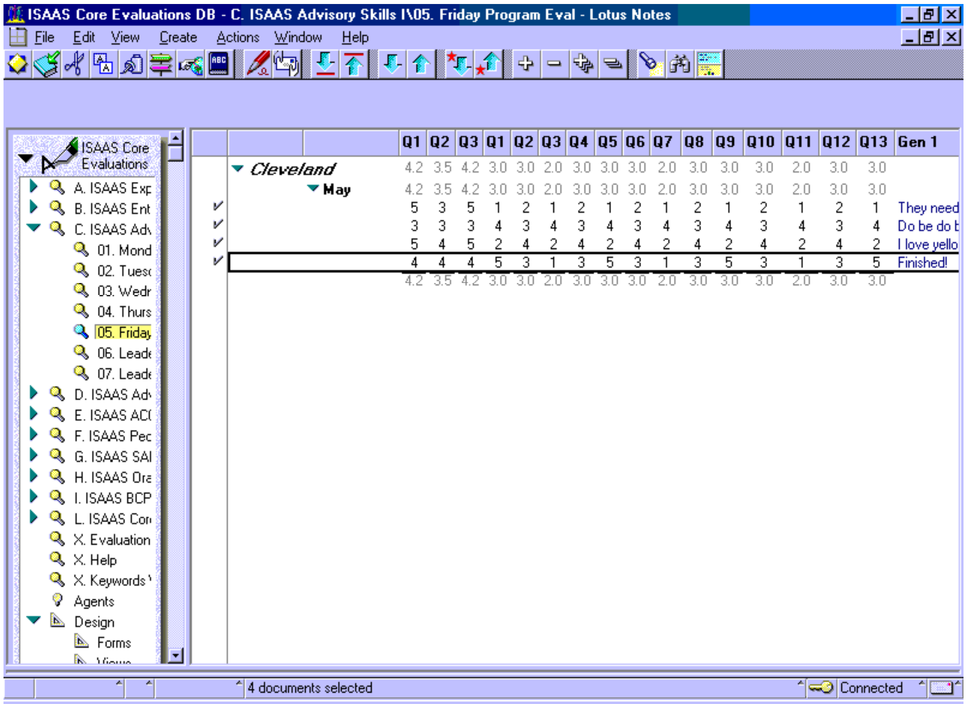
04a. How Do I Create a Report?

Use the following steps to use the reporting tool correctly:

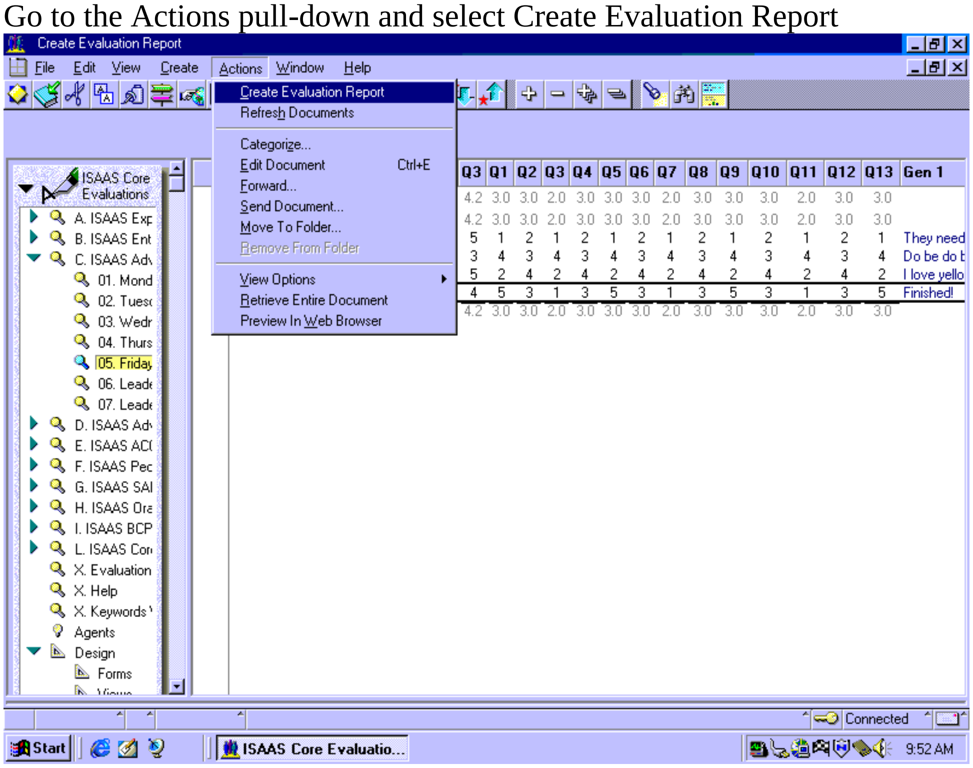
1. Open the database and select the Admin button
2. Open the view for the report you wish to create
3. Open up the view to the document level where you see the individual evaluations



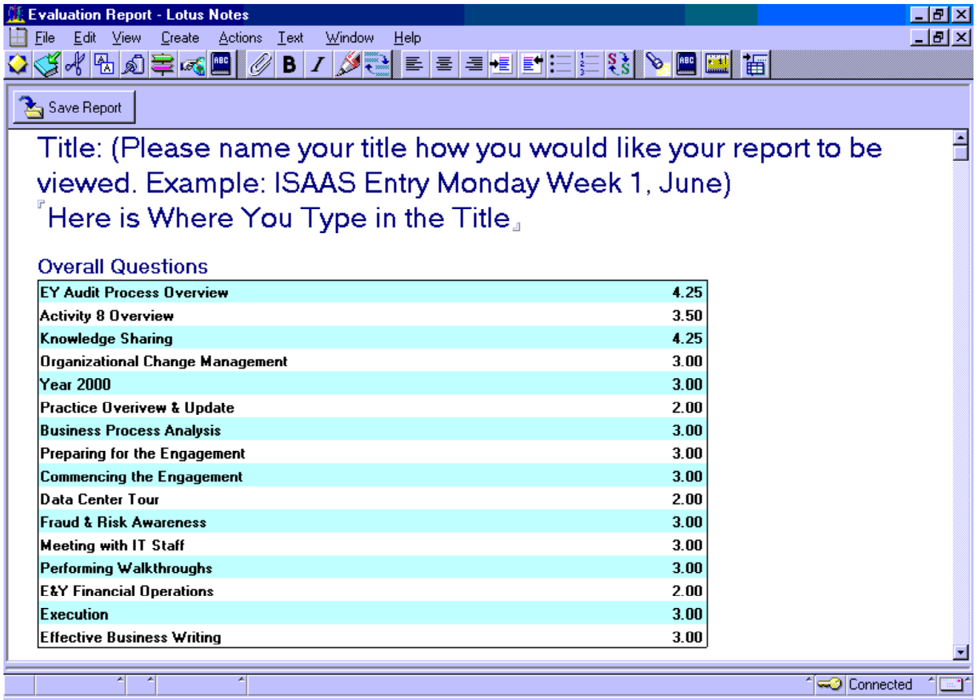
4. Use your space key to select the inidividual evaluations for your report



5. Go to the Actions pull-down and select Create Evaluation Report



6. Add a Title to Distinguish the Report and Click Save Report



7. Go to the X. Evaluation Reports to view all reports that have been saved

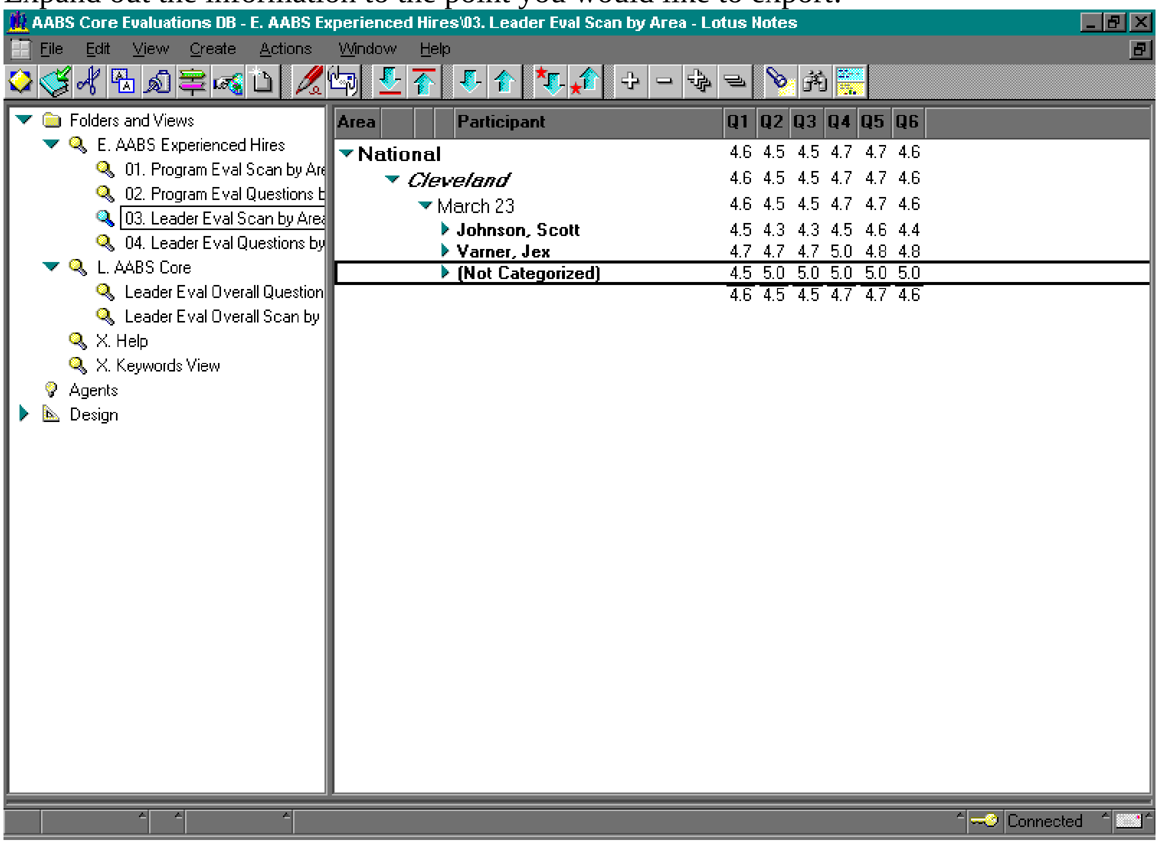
If you wish to mail forward your report, select the Actions/Foward and your report will be able to be emailed to the appropriate party. At this point, you can clean up any unnecessary comments that appear with the report. The report will give you a list of all rated questions with their averages. You will also recieve all of the comments questions at the bottom, which will show the general question and all comments for that section.

04b. How do I Forward a Report When Finished?

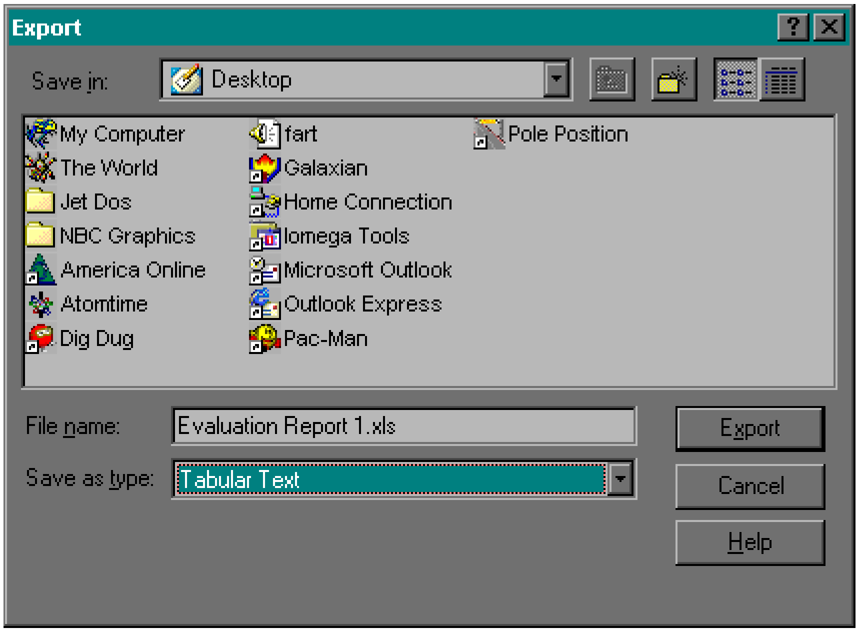
To forward a report, first, make sure you have a report generated. From the reports view, select the report for forwarding. Single select the the report. Select the Actions/Forward. An email appears, allowing you to enter receivers' names just like you would for any normal email.

04c. How do I Export a View?

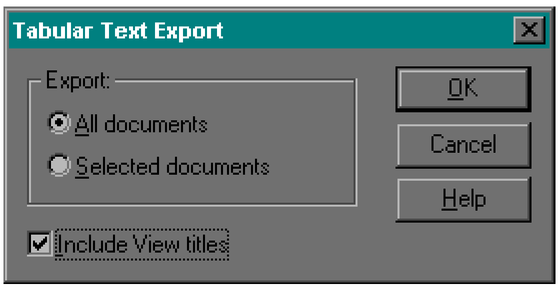
1. Open the database to the view you would like to export.
2. Expand out the information to the point you would like to export.



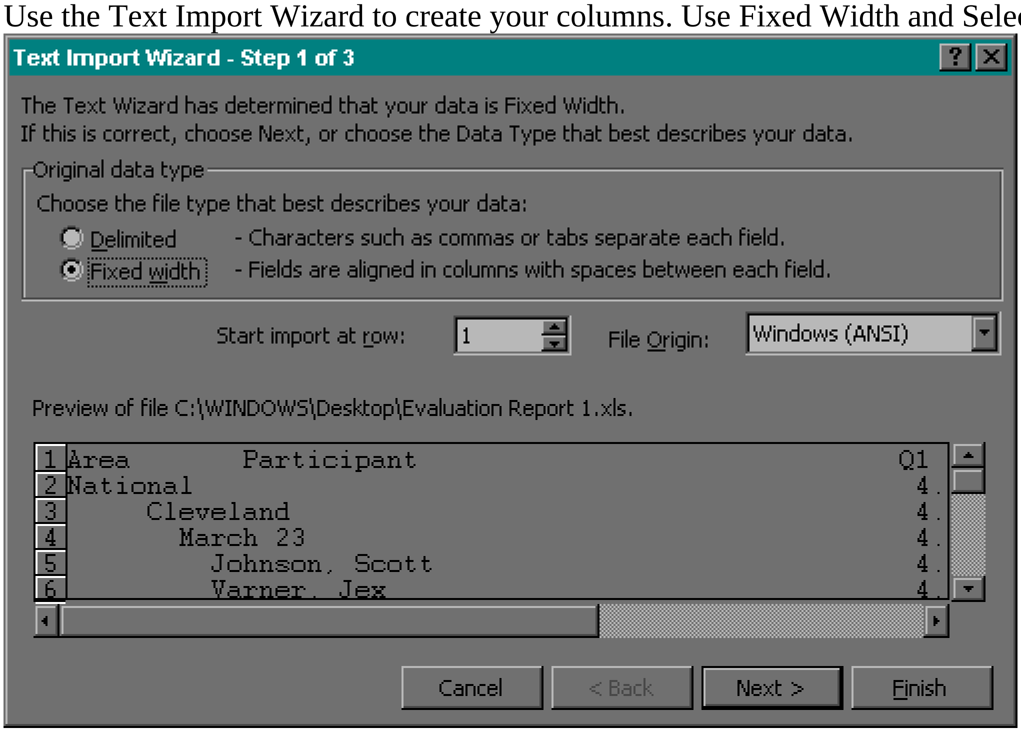
3. Select File/Export.
4. Give the file a name and a (.)xls extension. Also, Save as Type—Tabular Text. Click Export.



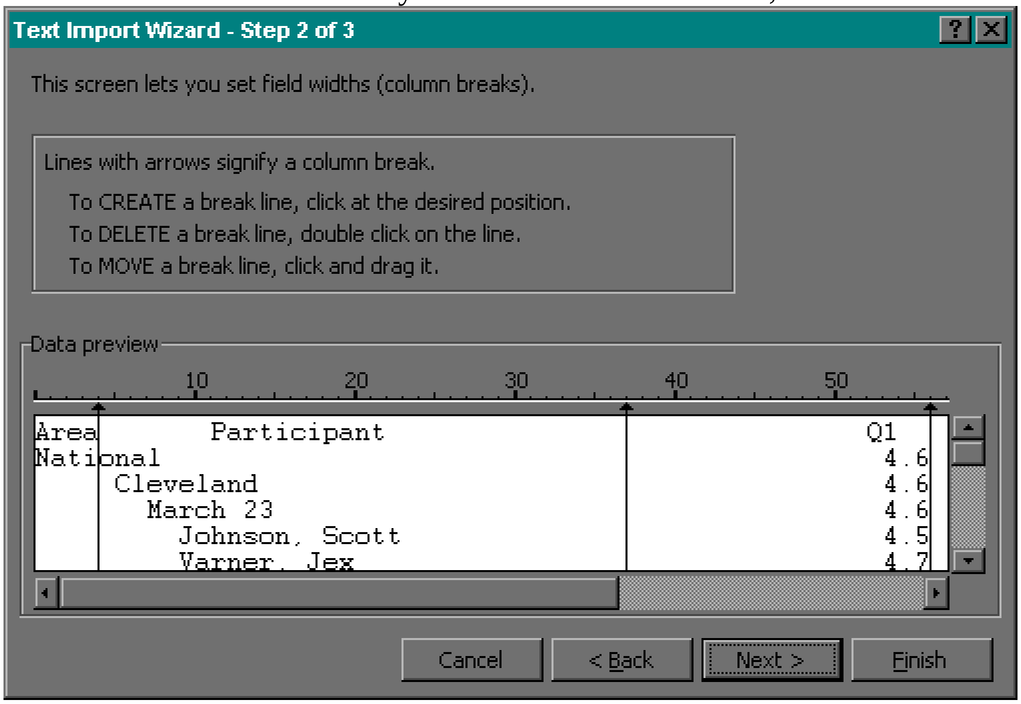
5. Select All Documents and Include View Titles. Click OK.



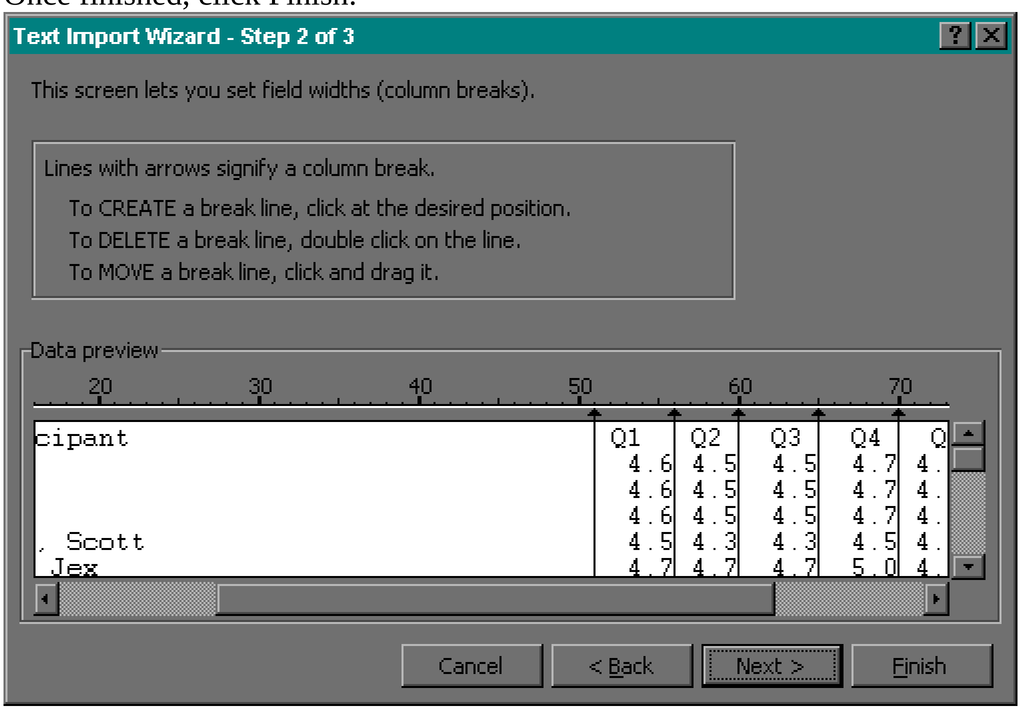
6. Open Microsoft Excel and open the file
7. Use the Text Import Wizard to create your columns. Use Fixed Width and Select Next.



8. Use the vertical lines to create your columns. Once finished, select Next.



9. Once finished, click Finish.



10. You will probably need to do some cleanup of the first column.

04d. What Security Mechanisms are in Place for the Evaluations?

There are many fields where a participant must enter information so that the evaluation will be accepted. Certain fields have been secured with dialogs appearing if the field is blank. Below are the fields being secured and the dialog that appears if blank:

Program: Please make sure you have entered in all pertinent program information to submit your evaluation.

ProgramDate: Please make sure you have entered in all pertinent program information to submit your evaluation.

ProgramLocation: Please make sure you have entered in all pertinent program information to submit your evaluation.

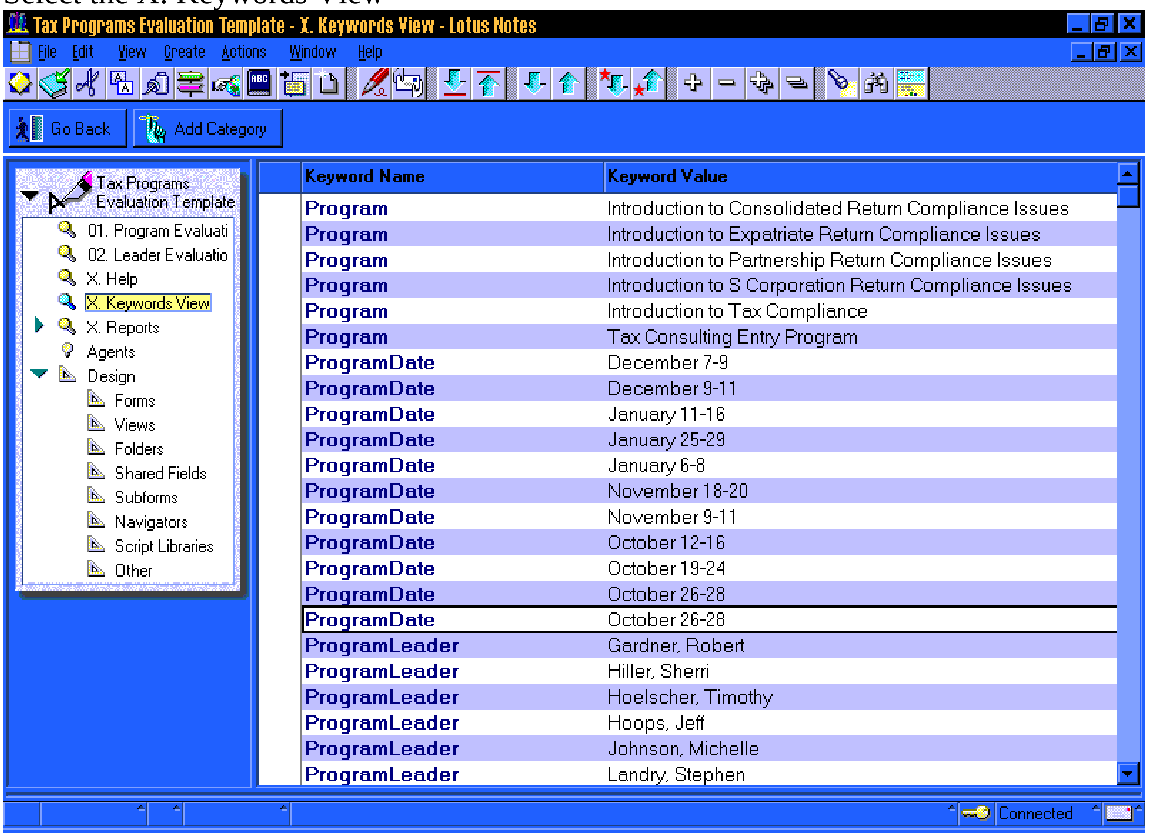
ProgramLeader: Please make sure you have entered a leader's name to submit your evaluation.

Rated Question fields: Please make sure you have answered all rated questions to submit this evaluation.

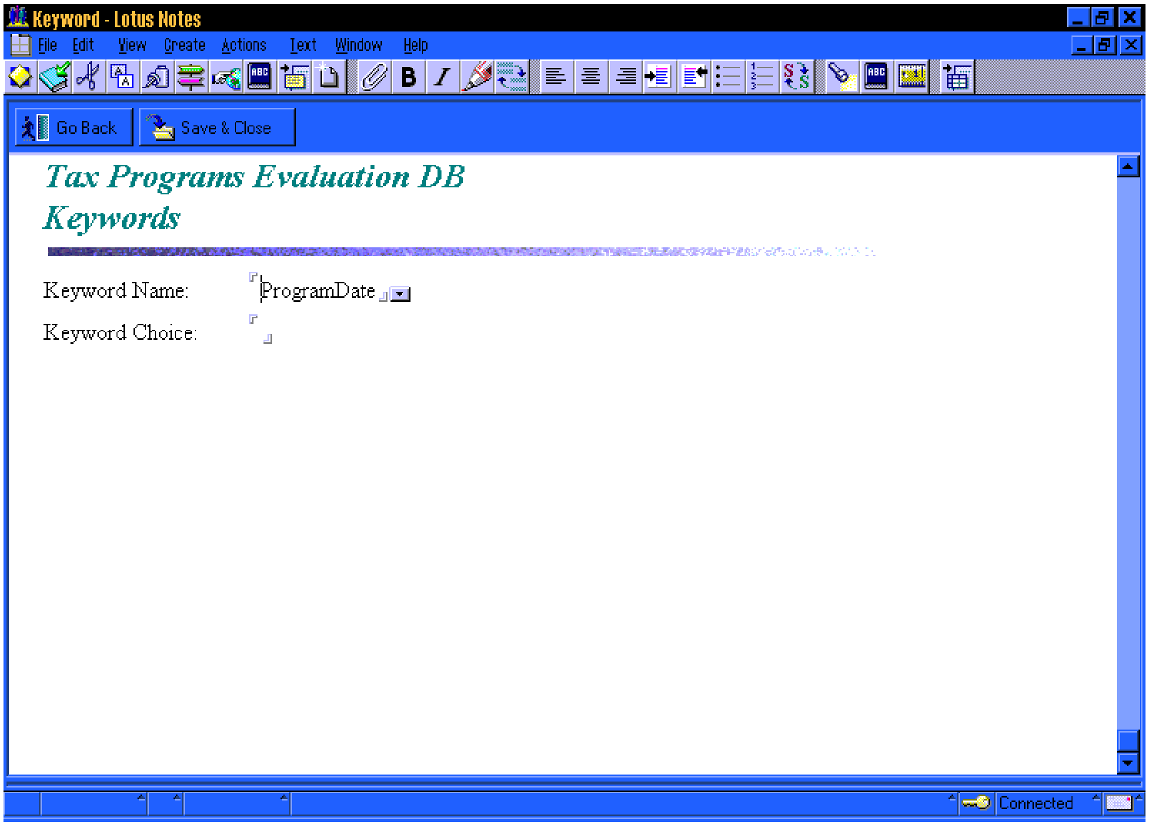
04e. How do I Create Keywords?

The following steps will help you update the keywords list:

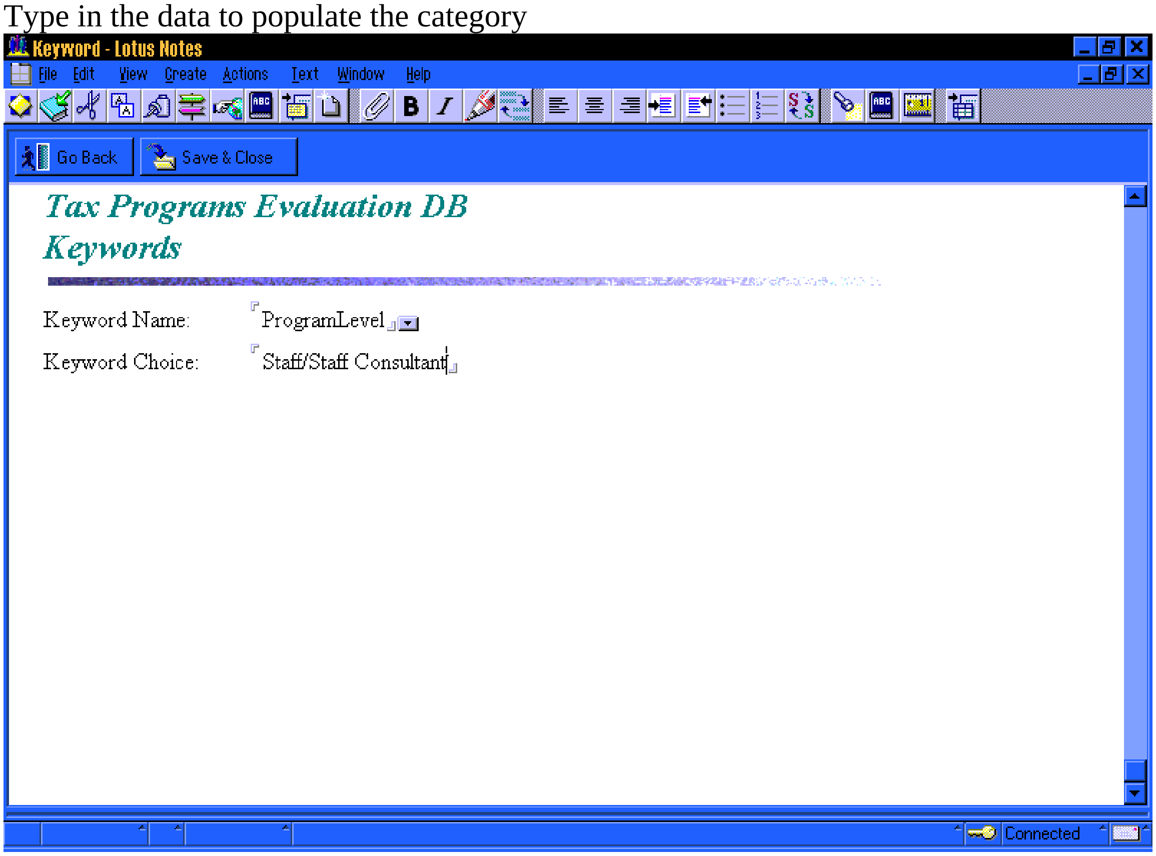
1. Open the database and click the **Admin** button
2. Select the X. Keywords View



3. Click the **Add Category** button
4. Select which keyword you are populating (program, programdate, programleader, programlevel, programlocation)



5. Type in the data to populate the category



6. Click the **Save & Close** button to finish the keyword

04f. How do I Update Keywords?

1. Select the Keywords view.
2. Select the keyword that needs to be updated.
3. Click the CTRL + E (to put document in edit mode).
4. Make the appropriate changes.
5. Click the Save & Close button to save your changes.

04g. How do I Delete Keywords?

1. Select the Keywords view.
2. Select the keyword that needs to be deleted.
3. Click the DEL key and F9 to refresh your changes.