



INSTRUCTOR ROSTER TOOL

Instructions

**for use with Roster Tool
Tool Tips and Help Screens**

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Table of Contents

- Capabilities 1
 - Tool Tips 2
 - Help Screens 2
- Preparation 3
 - Initial Setup 3
 - How to Open and Close the Roster Tool 3
- Quick Steps 4
 - 1. Create Class 4
 - 2. Notify Training Center 4
 - 3. Register Students and Post Results 4
 - 4. Send Roster 4
 - 5. Mark Roster Submitted 4
 - 6. Create Next Class and Register Students 4
 - 7. Backup 4
- Basic Setup 5
 - Training Center 6
 - Instructors 8
- Classes 11
 - Create a New Class 12
 - Notify Training Center 16
 - Update Class Information 17
 - Mark a Roster Submitted 17
 - Copy and Change a Class 17
 - List Classes 19
 - Find Classes 21
 - Sort Classes 23
 - Delete a Class 23
- Students 24
 - Register a New Student 26
 - Print Sign-in Sheet 28
 - Update Student Information 29
 - Post Student Results 29
 - Register a Student in Another Class 31
 - Manage Online Students 34
 - Find Students 37
 - Sort Students 38
 - Delete a Student 38
- Rosters 39
 - Print a Roster 39
 - E-mail a Roster 41
- Appendix 47
 - Advanced Setup 47
 - Using an Application Based on FileMaker® Pro 52
 - Backup and Restore 61

Capabilities

The Roster Tool, provided by WorldPoint®, gives the individual instructor or small training site the following capabilities to manage emergency cardiac care training records:

- Record instructors, including expiration dates for teaching credentials
- Record class information, including date, time, location, and instructors
- Record student information, including name, contact information, class
- Update instructor, class, and student information
- Track class registration
- Notify training center of planned class
- Print list of all classes
- Print class sign-in sheets
- Post student results, including remediation
- Print and e-mail class rosters (front and back)
- Record online course work
- Find classes and students
- Create additional course types
- Define affiliated training center
- Specify national training organization

Training centers with the WorldPoint ONE® application can use the information sent via e-mail from the Roster Tool to recreate the class, import the students, and print the wallet cards.

Contact WorldPoint regarding the WorldPoint ONE Training Center Management software if additional capabilities are needed for managing your training classes, or if server capabilities are appropriate for your environment.

Roster Tool documentation includes:


- Tool tips for every field and button
- Help screens on each screen and tab
- Instructions guide available from the main menu
- www.WorldPointONE.com site for additional information and tutorials

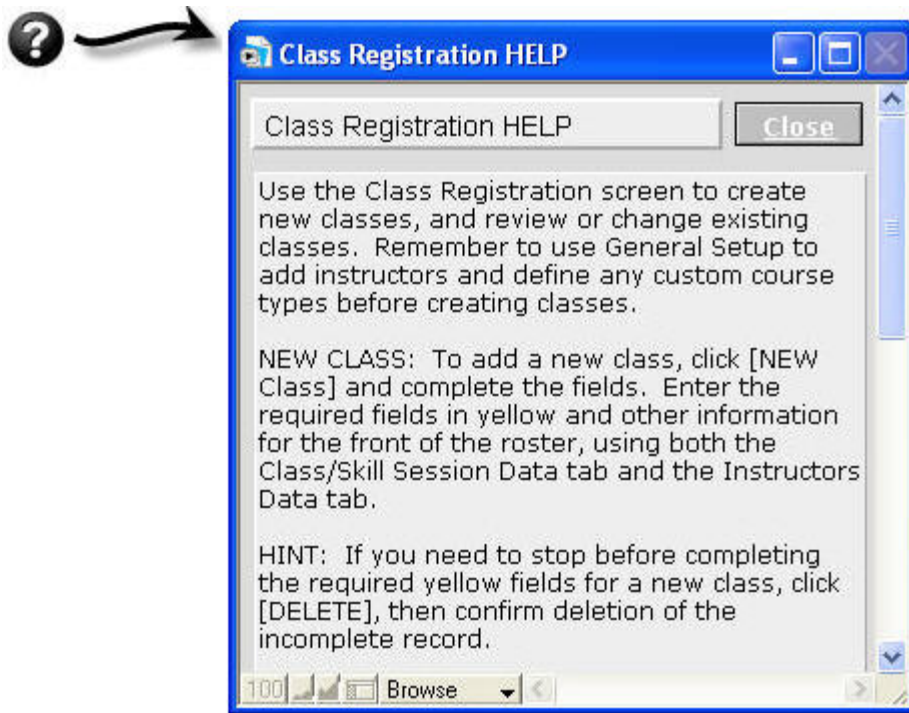
Tool Tips

The Roster Tool has a tool tip for every field and button. Place your cursor over the field or button to display the tool tip briefly.



Help Screens

The Roster Tool has a help screen for each screen and tab. Click the Help icon  to display the applicable help screen, scroll if necessary, then click [Close] to return to the Roster Tool screen.



Preparation

Before using the Roster Tool to record class and student information, perform these steps.

Initial Setup

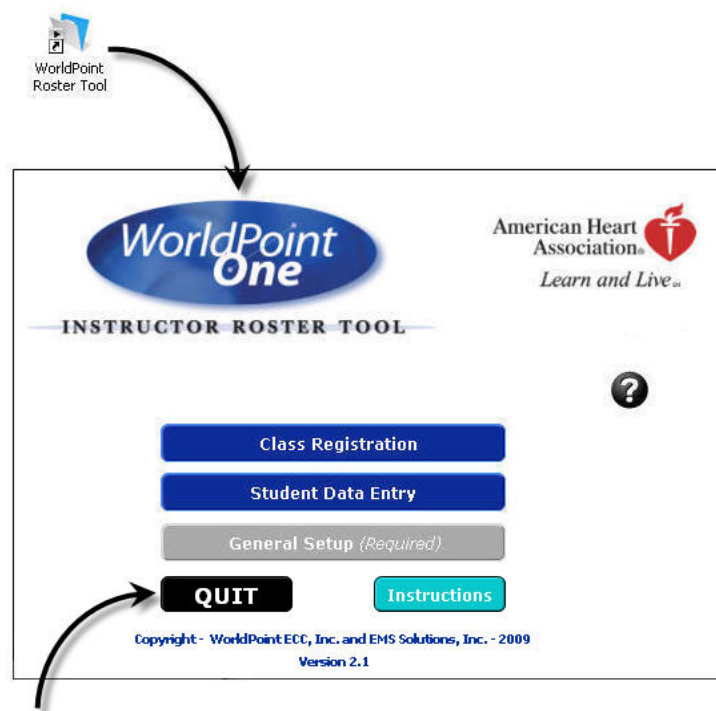
After installing the Roster Tool on your computer, set up the Training Center that will receive your rosters and the instructors who will teach your classes.

After starting the Roster Tool from the desktop icon for the first time, choose [General Setup] from the main menu, then use the *Training Center* and *Instructors* tabs.

See Training Center on page 6.

How to Open and Close the Roster Tool

To open the Roster Tool main menu, double click the desktop icon.



To exit the Roster Tool, click [QUIT] on the main menu.

Always exit Roster Tool from the main menu. Click [Main Menu] to return to the main menu, then choose [QUIT] to exit the Roster Tool properly and close files in an orderly fashion.

Quick Steps

After downloading and installing the Roster Tool, and performing the initial setup, follow these steps when using the Roster Tool on a regular basis.

1. Create Class

Create the classes you will be offering. Choose [Class Registration] from the main menu, then choose [NEW Class]. See Create a New Class on page 12.

2. Notify Training Center

If required by your affiliated Training Center, send a notification e-mail regarding the planned class. In the *Class Registration* screen, choose [Notify Training Center]. See Notify Training Center on page 16.

3. Register Students and Post Results

Register students in classes, then post student results when the class is completed. Choose [Student Data Entry] from the main menu. See Register a New Student on page 26.

4. Send Roster

Submit the class roster to the Training Center, by printed report or e-mail. See Rosters on page 39.

5. Mark Roster Submitted

Mark the class as submitted on the *Class / Skill Session Data* tab in the *Class Registration* screen. See Mark a Roster Submitted on page 17.

6. Create Next Class and Register Students

In the *Class Registration* screen use [NEW Class] or [COPY Class]. See Create a New Class on page 12 or Copy and Change a Class on page 17.

In the *Student Data Entry* screen use [NEW Student], [COPY Student], or select another class for the student. See Register a New Student on page 26 or Register a Student in Another Class on page 31.

7. Backup

Copy your valuable data to external media.

See Backup on page 61.

Basic Setup

After installing the Roster Tool, perform initial setup before creating classes and registering students.

Use setup initially to:

- Define your affiliated Training Center
- Add instructor information

Return to the setup screens at any time to add or change information.

From the Roster Tool main menu, choose [General Setup] to reach the *General Setup* screen.

The screenshot displays the 'INSTRUCTOR ROSTER TOOL' main menu on the left and the 'General Setup' screen on the right. The main menu includes buttons for 'Class Registration', 'Student Data Entry', 'General Setup (Required)', 'QUIT', and 'Instructions'. The 'General Setup' screen is titled 'Describe your affiliated Training Center (TC)' and features a 'WorldPoint One' logo and a 'Main Menu' button. Below the title are four tabs: 'Training Center', 'Instructors', 'Settings', and 'Course Types'. The 'Training Center' tab is active, showing input fields for 'TC Name', 'TC Coordinator', 'TC Phone', 'TC Fax', 'TC State & Country' (with 'NY' and 'USA' selected), and 'TC E-Mail'. A help icon (?) is located in the top right corner of the form area.

Training Center

Set up the information about your Training Center before e-mailing your Training Center about a planned class and before printing a roster.

Enter Information

This tab describes the Training Center (TC) that will receive your rosters.

In the *General Setup* screen, choose the *Training Center* tab (if it is not displayed).

Training Center	
Describe your affiliated Training Center (TC)	
TC Name	Training Headquarters
TC Coordinator	John Smith
TC Phone	
TC Fax	
TC State & Country	NY USA
TC E-Mail	jsmith@TrainingHeadquarters.org

Type data in the fields. Include all yellow fields for basic Roster Tool functionality, and additional fields as appropriate. Refer to the tool tips on the screen for information about individual fields.

Change Information

To change information about your affiliated Training Center, use the *Training Center* tab to add and correct information as needed. See Advanced Setup on page 47 to change the national training organization name and logo.

Example

To add the TC phone number, type the new information in the field.

TC Name	Training Headquarters	
TC Coordinator	John Smith	
TC Phone	(800) 555-1212	
TC Fax		
TC State & Country	NY	USA
TC E-Mail	jsmith@TrainingHeadquarters.org	

Next Step

Set up instructors after completing the Training Center information.

Instructors

Add the instructors who will teach your classes, before creating classes.

In the *General Setup* screen, choose the *Instructors* tab to:

- Add instructors
- Maintain expiration dates for instructor credentials

Add and update instructor information as appropriate, and delete instructor records when no longer needed.

Instructors

*Enter data for new instructor, then click [ADD Instructor].
(If instructor has multiple certifications, click (?) for guidance.)*

Instr. ID	First Name	M.I.	Last Name	Ext.	Expiration Date

ADD Instructor

Instr. ID	First Name	M.I.	Last Name	Ext.	Exp. Date	
22	Tom		Johnson		07-16-09	DELETE?
20	Michael		Jones		02-04-10	DELETE?

Add a record for each instructor, including the certification expiration date.

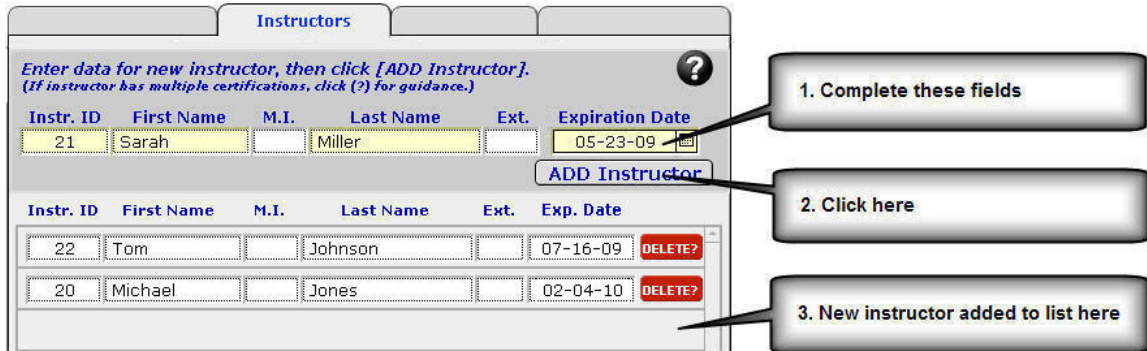
Note: Instructors are listed alphabetically by last name.

Add Instructor

Use the *Instructors* tab to add an instructor to the Roster Tool. Refer to the tool tips on the screen for information about individual fields.

Complete the appropriate fields at the top of the screen, and click [ADD Instructor].

The new instructor record is added to the list of instructors.



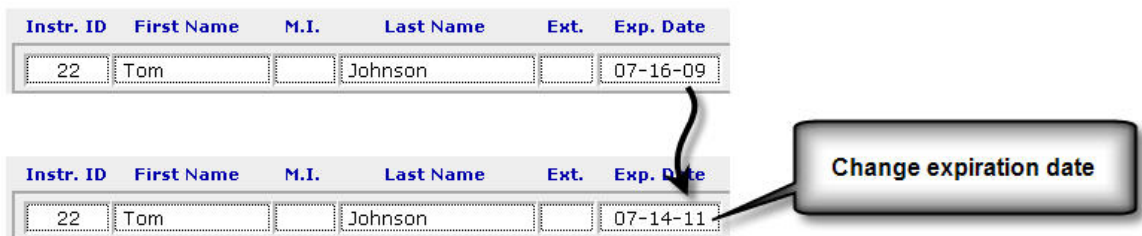
Note: If the Training Center will be importing your roster information into WorldPoint ONE, then obtain the correct instructor IDs from the Training Center before setting up any instructors. Each instructor record must contain the ID used by the Training Center, to facilitate proper importing of rosters into WorldPoint ONE.

Update Instructor Information

To change an instructor record, click the information that needs to be changed, and enter the correct information.

Example

When an instructor renews his or her teaching certification, enter the new expiration date.



Instructor with Multiple Certifications

If an instructor's teaching assignments require different certifications, then create one record for each of the instructor's certifications that will be needed for your classes, using the same identification number and appending several letters at the end to indicate the type of certification.

Example

Instr. ID	First Name	M.I.	Last Name	Ext.	Exp. Date
23BLS	Jill		Sawyer		01-16-10
23FA	Jill		Sawyer		03-17-10
23ACLS	Jill		Sawyer		06-23-10

Note: If the ID is longer than the field, click the ID to display the additional characters.

Delete Instructor

To delete an instructor from the Roster Tool, click the [DELETE?] button by the instructor record, then click [Delete] to confirm the deletion.

Note: Instructor information already included in class records will not be removed.

Next Step

Return to the main menu to create classes and register students, after the Training Center and instructor information have been added in *General Setup*.

Classes

After instructors have been added in *General Setup*, classes can be created.

You can create classes before or after the class is held. When creating a class, specify the course type, start/end date and time, location, lead instructor, and any assisting instructors.

Create the class in the Roster Tool before the class date and e-mail it to your Training Center to comply with emergency cardiac care guidelines. When necessary, classes can be entered in the Roster Tool after they have been taught, for the purposes of printing or e-mailing the roster.

From the Roster Tool main menu, choose [Class Registration] to:

- Create a class
- E-mail a planned class to the Training Center
- Change class information
- Print a roster (front)
- E-mail a roster (front and back)
- Review classes

Class Registration

Class Number

Course Type

Heartsaver Sub-Option < Clear Field

Class Location

Location Name

Address

City State

Zip Country

Required fields
in yellow

[Main Menu](#)

[ADD Class](#)

[COPY Class](#)

[Next Class >>](#)

[<< Prev. Class](#)

[FIND](#)

[CANCEL FIND](#)

[SORT](#)

[DELETE](#)

[Student Data Entry](#)

[Class List](#)

[Roster - Front](#)

[Notify Training Center](#)

[E-mail Roster](#)

Class/Skill Session Data	Instructor Data
<p>Dates Times (Use 24 hour clock, ie. 4pm = 16:00)</p> <p>Start <input type="text" value="07-14-2009"/> <input type="text" value="18:00"/></p> <p>End <input type="text" value="07-14-2009"/> <input type="text" value="20:00"/></p> <p>Total Class Hours <input type="text" value="2.0"/></p> <p><input checked="" type="radio"/> Initial Training <input type="radio"/> Renewal Class</p> <p>Outside Students? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Student-to-Manikin Ratio <input type="text" value="4:1"/></p> <p>Send Cards to <input type="text" value="Students"/></p> <p>Books, manikins, supplies needed from TC for class <input type="text" value="16 course manuals"/></p> <p>Roster Submitted? <input type="radio"/> Yes, if roster has been sent <input checked="" type="radio"/> No, to keep class on list of available classes</p>	<p>Enrollment Counts</p> <p>Estimated <input type="text" value="16"/></p> <p>Registered <input type="text" value="15"/></p> <p>Completed <input type="text" value="14"/></p> <p>Remediated <input type="text" value="6"/></p>

Create a New Class

Use the *Class Registration* screen to create a class. Choose [NEW Class] and complete all required yellow fields, and other fields as appropriate. Refer to the tool tips on the screen for information about individual fields.

Note: The new class is created as you enter data. There is no need to confirm the record by clicking a button.

Course Type

The fields at the top of the screen describe the type of class.

Class Number	BLS081609
Course Type	CPR for Family and Friends
Heartsaver Sub-Option	

Heartsaver Example

To create a new class with Heartsaver sub-options, choose the course type, then the sub-options from the list of sub-options available for this course type.

Course Type	Heartsaver CPR
Heartsaver Sub-Option	Adult/Child CPR and Choking - (A)

Class Location

These fields near the top of the screen describe the teaching location.

Class Location			
Location Name	Milltown Community Center		
Address	125 Main St		
City	Milltown	State	NY
Zip	10900	Country	USA

Class/Skill Session Data Tab

The fields on the *Class / Skill Session Data* tab in the *Class Registration* screen describe class specifics, including date, time, and length of class.

Class/Skill Session Data

Dates Times (Use 24 hour clock, ie. 4pm = 16:00)

Start 07-14-2009 18:00

End 07-14-2009 20:00

Total Class Hours 2.0

Initial Training Renewal Class

Outside Students? Yes No

Student-to-Manikin Ratio 4:1

Send Cards to Students

Books, manikins, supplies needed from TC for class 16 course manuals

Enrollment Counts

Estimated 16

Registered 15

Completed 14

Remediated 6

Roster Submitted? Yes, if roster has been sent No, to keep class on list of available classes

Note: If you are creating two classes at the same time on the same day at the same location, alter the start time slightly, so they will both be available on the dropdown list of available classes in the *Student Data Entry* screen. For example, start one class at 9:00am and the other class at 9:01am.

Keep Class on Dropdown List

Be very careful with the Roster Submitted? radio buttons on this tab.

Roster Submitted? Yes, if roster has been sent No, to keep class on list of available classes

A class remains available for registering students until the roster is marked as submitted in the *Class Registration* screen.

Do not indicate that the roster has been submitted until after you have registered all students, posted all student results, and printed or e-mailed the roster.

Instructor Data Tab

Use the *Instructor Data* tab in the *Class Registration* screen to assign the instructor(s) to the class.

Lead Instructor ID & Name		Exp. Date		
22	Johnson, Tom	07-14-11		
Assisting Instructor(s)		Exp. Date	Modules	3
23BLS	Sawyer, Jill	01-16-10		Delete?
24	King, Peter	01-06-10		Delete?
26	Byrne, Alice	12-07-09		Delete?
				Delete?

All assisting instructors are included in e-mail; the first 12 are printed on front of roster.

Manikin Decontamination: Tom Johnson

Course Director: _____

Physician Instructor: _____

A lead instructor must be assigned to the class. If assisting instructors are assigned, the first twelve are included on the printed roster, while all assisting instructors are included in the e-mailed roster.

Assign Lead Instructor

Select the lead instructor's ID from the dropdown list.

Lead Instructor ID & Name

20: Jones, Michael ▲

21: Miller, Sarah

22: Johnson, Tom

Assign Assisting Instructors

Select the assisting instructor's ID from the dropdown list. Assisting instructors for the class are listed in the order entered.

Assisting Instructor(s)

26 Byrne, Alice

20: Jones, Michael ▲

21: Miller, Sarah

22: Johnson, Tom

Reassign Instructors

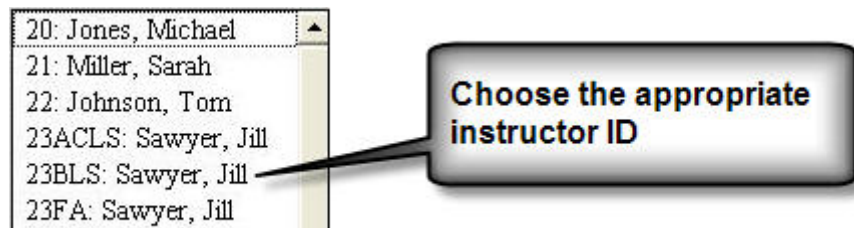
To change an instructor, select a different instructor ID from the dropdown list. Any incorrect assisting instructor assignments can be deleted.

Instructor with Multiple Certifications

Instructors with multiple certifications are set up with an instructor ID for each certification, with several letters appended to the ID to indicate the type of certification. Choose the instructor ID with the appropriate certification for the course type.

Example

One of the assistant instructors for this class has multiple certifications.



Next Steps

After completing the work in the *Class Registration* screen, notify your Training Center of the planned class.

After receiving Training Center approval for the class, choose [Student Data Entry] from the main menu or the *Class Registration* screen to go to the *Student Data Entry* screen and start registering students.

Notify Training Center

After creating a new class, use [Notify Training Center] to notify your Training Center via e-mail of the planned class, if your national organization's guidelines require this.

Class Registration

Main Menu

ADD Class

COPY Class

Next Class >>

<< Prev. Class

FIND

CANCEL FIND

SORT

DELETE

Student Data Entry

Class List

Roster - Front

Notify Training Center

E-mail Roster

Notify Training Center by E-mail

CLASS REGISTRATION

Automatic E-mail

Manual E-mail

Automatic e-mailing is available if you use Outlook/Outlook Express, MS Entourage/Mail or OS X Mail.

To: jsmith@TrainingHeadquarters.org

Cc:

Subject: Announcement of a Heartsaver CPR Class from Tom Johnson

This e-mail is to notify you of a planned class: Heartsaver CPR - Initial Training.
This course will be taught with the following sub-options:
Adult/Child CPR and Choking - (A).

The class will be held at Milltown Community Center, 125 Main St, Milltown, NY 10900.
It is scheduled to start July 14, 2009 at 18:00 and end the same day at 20:00, for a total of 2.0 class hours.

A student-to-manikin ratio of 4:1 is planned. Please send wallet cards to Students upon class completion.

I will need the following materials and/or equipment to run this class:
16 course manuals.

The lead instructor is Tom Johnson, ID# 22, Exp. Date: 7/14/2011, and assisting instructor(s) will be:
ID# 23BLS, Sawyer, Jill, Exp. Date: 1/16/2010 - Instruction Module/Topic = Adult.
ID# 24, King, Peter, Exp. Date: 1/6/2010 - Instruction Module/Topic = Child.
ID# 26, Byrne, Alice, Exp. Date: 12-7-2009 - Instruction Module/Topic = Choking.

The manikins will be cleaned by Tom Johnson. Thank you for your prompt attention to this notification of a planned class and request for class materials.
Regards, Tom Johnson

Place this e-mail in your outbox

Choose automated e-mailing if you use Outlook, Outlook Express, MS Entourage, Mail, or OS X Mail.

Choose manual e-mailing if you will use another e-mail program.

Refer to E-mail a Roster on page 41 for additional information on e-mailing from the Roster Tool.

Update Class Information

Find the class in the *Class Registration* screen, then correct information as needed.

Mark a Roster Submitted

After student results have been posted and the roster has been submitted, remove the class description from the list of classes available for registering students.

Use the *Class / Skill Session Data* tab on the *Class Registration* screen, and choose **Yes** for Roster Submitted?

Roster Submitted?	<input checked="" type="radio"/>	Yes, if roster has been sent
	<input type="radio"/>	No, to keep class on list of available classes

Note: When the roster is marked as submitted, the class record remains in the Roster Tool database, but is removed from the dropdown list used to register students in classes, to keep the information on the list current, and the size of the list manageable.

Copy and Change a Class

In the Roster Tool, you can copy an existing class, then change information as appropriate to create a new class.

Use the *Class Registration* screen, find the existing class, click [COPY Class], then change the fields as needed.

Example

If the same instructors teach the same class at the same time in the same location on a regular basis, create the class once, then copy the class record and change the class dates to create the next class. Correct class details as necessary.

Class Registration

Class Number: BLS071409
 Course Type: Heartsaver CPR
 Heartsaver Sub-Option: Adult/Child CPR and Choking - (A)

Class Location

Location Name: Milltown Community Center
 Address: 125 Main St
 City: Milltown State: NY
 Zip: 10900 Country: USA

Class/Skill Session Data

Dates: Start: 07-14-2009 18:00, End: 07-14-2009 20:00
 Times: (Use 24 hour clock, ie. 4pm = 16:00)
 Total Class Hours: 2.0

Instructor Data

Enrollment Counts: Estimated: 16, Registered: , Completed: , Remediated:

Initial Training: Initial Training Renewal Class
 Outside Students?: Yes No
 Student-to-Manikin Ratio: 4:1
 Send Cards to: Students
 Books, manikins, supplies needed from TC for class: 16 course manuals
 Roster Submitted?: Yes, if roster has been sent No, to keep class on list of available classes

copy and change

Class Registration

Class Number: BLS091609
 Course Type: Heartsaver CPR
 Heartsaver Sub-Option: Adult/Child CPR and Choking - (A)

Class Location

Location Name: Milltown Community Center
 Address: 125 Main St
 City: Milltown State: NY
 Zip: 10900 Country: USA

Class/Skill Session Data

Dates: Start: 09-16-2009 18:00, End: 09-16-2009 20:00
 Times: (Use 24 hour clock, ie. 4pm = 16:00)
 Total Class Hours: 2.0

Instructor Data

Enrollment Counts: Estimated: , Registered: , Completed: , Remediated:

Initial Training: Initial Training Renewal Class
 Outside Students?: Yes No
 Student-to-Manikin Ratio: 4:1
 Send Cards to: Instructor
 Books, manikins, supplies needed from TC for class: 16 course manuals
 Roster Submitted?: Yes, if roster has been sent No, to keep class on list of available classes

Instructor Data

Lead Instructor ID & Name	Exp. Date
22 Johnson, Tom	07-14-11

Assisting Instructor(s)	Exp. Date	Modules	Assisting
		0	

- Main Menu ?
- ADD Class
- COPY Class
- Next Class >>
- << Prev Class
- FIN
- CANCEL/END
- SEARCH
- DELETE
- Student Data Entry
- Class List
- Roster Front
- Notify Train Center
- E-mail Center

1. Click [COPY Class]
2. Create new class number, if class numbers are used
3. Change class dates
4. Calculated enrollment counts are cleared automatically
5. Check details for class
6. Check lead instructor and assign assisting instructors if applicable

List Classes

This list of classes can be reviewed on the screen or printed, and contains the following data for each class on the report:

- Start date
- Course type
- Class number, if used
- Teaching location
- Lead instructor
- Enrollment counts
- Roster status (roster is submitted or class is still available to register students)

All classes in the Roster Tool are included unless a specific group of classes has been selected for the report. See Find on page 55.

From the *Class Registration* screen, click [Class List] for a list of all classes in the Roster Tool.

Class List - Sorted by Latest Start Date													
Start Date	Course Type / Class #	Class Location	Lead Instr.										
10/12/09	ACLS Provider Detail ACLS101209	Milltown Hospital 200 River Rd	Sawyer, Jill Milltown	Estimated	10	Registered	12	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
09/17/09	BLS HCP Online Detail BLS091709	Milltown Hospital 200 River Rd	Byrne, Alice Milltown	Estimated	12	Registered	0	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
09/16/09	Heartsaver CPR Detail BLS091609	Milltown Community Center 125 Main St	Johnson, Tom Milltown	Estimated	16	Registered	0	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
08/21/09	Heartsaver CPR in Schools Detail BLS082109roomA	Board of Education 25 High St	Jones, Michael Milltown	Estimated	24	Registered	19	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
08/21/09	Heartsaver CPR in Schools Detail BLS082109roomB	Board of Education 25 High St	Miller, Sarah Milltown	Estimated	24	Registered	24	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
08/16/09	CPR for Family and Friends Detail BLS081609	Milltown Community Center 125 Main St	Byrne, Alice Milltown	Estimated	20	Registered	8	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
08/15/09	Heartsaver First Aid-Pediatric Detail FA081509	Coaches Association 150 High St	Sawyer, Jill Milltown	Estimated	12	Registered	10	Completed	0	Remediated	0	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
07/14/09	Heartsaver CPR Detail BLS071409	Milltown Community Center 125 Main St	Johnson, Tom Milltown	Estimated	16	Registered	15	Completed	14	Remediated	6	Roster Submitted?	<input type="radio"/> Yes <input checked="" type="radio"/> No
06/13/09	HealthCare Provider Detail BLS061309	Milltown Police Station 5 High St	Higgins, Marcia Milltown	Estimated	15	Registered	16	Completed	16	Remediated	0	Roster Submitted?	<input checked="" type="radio"/> Yes <input type="radio"/> No

To review the list of classes, use the right-hand scroll bar. To review details for any class on the report, click the [Detail] button by the class to display that class in the *Class Registration* screen.

To print the list of classes, click [PRINT] in the Class List. In the Print dialog box, choose “Records being browsed” for Print, and “All” for Print Range, then click [OK].

Find Classes

All classes in the Roster Tool database are listed in the order they were created.

You can use the [Next] and [Previous] buttons on the screen or the book icon in the left-hand status area to look at each class in turn, or you can use the FileMaker Pro Find capability to search for classes.

In the *Class Registration* screen, click [FIND], use the fields in the screen to specify the class(es) you want to find, then click the [Find] button in the left-hand status area.

The screenshot shows the 'Class Registration' form with several sections and buttons. Annotations point to specific actions:

- 1. Click [FIND] on the right:** Points to the 'FIND' button in the right-hand navigation column.
- 2. Specify search criteria:** Points to the 'Class Location' section, which includes fields for Location Name, Address, City, State, Zip, and Country.
- 3. Click [Find] on the left:** Points to the 'Find' button in the left-hand status area.

Other visible elements include:

- Class Number:** A text field with a yellow highlight and a red 'Required fields in yellow' warning.
- Course Type:** A text field with a yellow highlight.
- Heartsaver Sub-Option:** A text field with a '< Clear Field' button.
- Class Location:** A section with fields for Location Name, Address, City, State, Zip, and Country.
- Class/Skill Session Data:** Includes 'Start' and 'End' date pickers, 'Total Class Hours', and radio buttons for 'Initial Training' and 'Renewal Class'.
- Instructor Data:** Includes 'Enrollment Counts' (Estimated, Registered, Completed, Remediated) and a 'Roster Submitted?' section with radio buttons for 'Yes' and 'No'.
- Buttons:** A vertical column of buttons on the right includes 'Main Menu', 'ADD Class', 'COPY Class', 'Next Class >>', '<< Prev. Class', 'FIND', 'CANCEL FIND', 'SORT', 'DELETE', 'Student Data Entry', 'Roster - Front', 'Notify Training Center', and 'E-mail Roster'.

Review the specified class(es) in the *Class Registration* screen or via the Class List report, then click [CANCEL FIND] to access all classes in the Roster Tool again.

Examples

To find all classes taught at a certain location, use the Location Name field to specify the location.

Location Name Milltown Community Center

To find all Heartsaver classes with a specific set of sub-options, use the Course Type field to specify the Heartsaver course type, and the Heartsaver Sub-Option field to specify the sub-option.

Course Type Heartsaver CPR
Heartsaver Sub-Option Adult/Child CPR and Choking - (A)

To find all classes with a particular instructor as lead or assisting instructor, use both instructor ID fields to specify that instructor.

To find a class by start date, enter the specific date in the Start Dates field.

To find all classes taught in a particular month, enter the month in the Start Dates field, using the **MM/YYYY** format.

To find classes taught before a certain date, use the Start Dates field and the “less than” symbol (<).

Start <8/31/2009

To find classes taught after a certain date, use the Start Dates field and the “greater than” symbol (>).

End >8/31/2009

To find all classes taught in the first six months of the year, use the Start Dates field to specify a date range.

Start 01/01/2009
 ...
 06/31/2009

Note: If your operating system is set to a language choice with the European date format (DD/MM/YYYY), and that date format is displayed in the class date fields, then use the European date format when finding classes by date.

Sort Classes

Classes on the Class List report are shown in order by start date, with the latest dates shown first.

To list the classes in a different order, return to the *Class Registration* screen, click [SORT] and specify the order for the list.

See Sort on page 57.

Delete a Class

Use the *Class Registration* screen with the class record displayed.

Click [DELETE], then [Delete] to permanently delete the displayed class from the Roster Tool database.

Note: Do not delete a class from the Roster Tool unless the class was never taught. Deleting a class removes it from the *Class List* and from the records of any students registered in the class.

Students

After classes have been created, students can be registered in the classes.

You can pre-register students for a class, and post student results after the class is taught, or else perform both these tasks after the class has been taught.

The Roster Tool handles both instructor-led classes with knowledge and skill components, and skill sessions for students who have completed the knowledge component online.

See Manage Online Students on page 34 to register online students and post their results.

From the Roster Tool main menu, or from the *Class Registration* screen, choose [Student Data Entry] to:

- Register a student in a class
- Print a sign-in sheet
- Change student information
- Post student results
- Enter date of successful remediation
- Enter information for online students in skill sessions
- Print a roster (back)
- Review students

The screenshot displays the 'INSTRUCTOR ROSTER TOOL' interface. At the top, there are four buttons: 'Class Registration', 'Student Data Entry', 'General Setup (Required)', and 'QUIT'. Below these is an 'Instructions' button. To the right is a 'Class Registration' panel with buttons for 'Main Menu', 'ADD Class', 'COPY Class', 'Next Class >>', '<< Prev. Class', 'FIND', 'CANCEL FIND', 'SORT', 'DELETE', 'Student Data Entry', 'Class List', 'Roster - Front', 'Notify Training Center', and 'E-mail Roster'. A large arrow points from the 'Student Data Entry' button in the top menu to the 'Student Data Entry' form on the right. The form contains fields for 'Last Name' (Tomas), 'First Name' (James), 'Address', 'City', 'State' (NY), 'Country' (USA), 'Zip' (with a 'plus 4' field), 'Phone-work/home', 'E-mail Address', 'Employee ID', 'Organization', 'Occupation', and 'Department'. Below these fields are sections for 'Preparation' and 'Completion'. The 'Preparation' section includes 'Type of training?' with radio buttons for 'Initial Training' and 'Renewal Class', and 'If renewing, current card valid?' with radio buttons for 'Yes' and 'No'. The 'Completion' section includes 'Materials sent?' with radio buttons for 'Yes' and 'No', and 'eLearning?' with a 'Yes' checkbox. A help icon (?) is visible in the bottom right of the form.

Register a New Student

Use the *Student Data Entry* screen to register a student in a class. Choose [NEW Student] and complete all required yellow fields, and other fields as appropriate. Refer to the tool tips on the screen for information about individual fields.

Note: The new student record is created as you enter the data. There is no need to confirm the record by clicking a button.

Student Information

The fields in the top half of the *Student Data Entry* screen describe the student.

Last Name	Callahan	Ext.	
First Name	Elizabeth	MI	
Address	178 Grand Ave		
City	Milltown		
State	NY	Country	USA
Zip	10900	plus 4	
Phone-work/home		(845) 555-1212	
E-mail Address	beth@CallahanCreations.com		
Employee ID			
Organization			
Occupation			
Department			

Choose a Class

Use the fields in the center of the *Student Data Entry* screen to select the class from the dropdown list to register the student in the class.

[CLICK HERE] to assign student to class

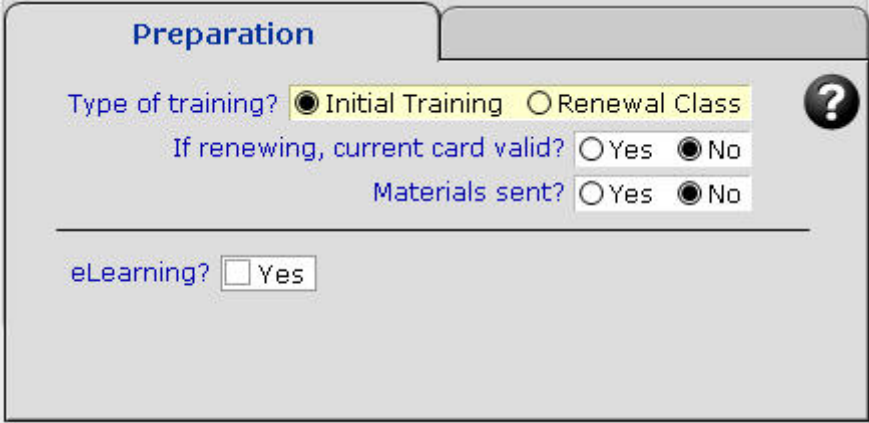
- Class# BLS071409 - Heartsaver CPR @ Milltown Community Center - 7/14/2009 at 1800 Hours
- Class# BLS081609 - CPR for Family and Friends @ Milltown Community Center - 8/16/2009 at 1400 Hours
- Class# FA081509 - Heartsaver First Aid - Pediatric @ Coaches Association - 8/15/2009 at 0900 Hours

Course Type	Heartsaver CPR Adult/Child CPR and Choking - (A)
Location	Milltown Community Center
Start Date	07-14-2009

Preparation Tab

Use the *Preparation* tab in the *Student Data Entry* screen for class tasks specific to each individual student. The fields at the top of the tab provide these capabilities:

- Change the type of training to renewal, for a student registered in an initial training class who only needs to recertify
- Confirm that prior certification is valid, for all students recertifying
- Record that course materials have been sent to the student (for ACLS and PALS classes with large textbooks)



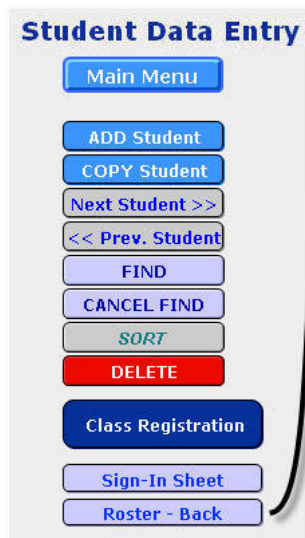
The screenshot shows the 'Preparation' tab interface. It features a title bar with the word 'Preparation' in blue. Below the title bar, there are three rows of radio button options. The first row is 'Type of training?' with 'Initial Training' selected (indicated by a filled radio button) and 'Renewal Class' unselected (indicated by an empty radio button). The second row is 'If renewing, current card valid?' with 'Yes' unselected and 'No' selected. The third row is 'Materials sent?' with 'Yes' unselected and 'No' selected. A horizontal line separates these options from the 'eLearning?' section below, which has a 'Yes' checkbox that is unselected. A circular help icon with a question mark is located in the top right corner of the tab area.

Print Sign-in Sheet

After registering all students in the class, you can print a sign-in sheet to use on the day of the class.

The header for the sign-in sheet includes the class number if used, course type, Heartsaver sub-options if applicable, lead instructor, teaching location, class start date and start time. Each student’s name, address, home phone, and e-mail are given, with room for the student’s signature. For online courses, additional lines are provided to record the date and start/end times of each student’s skill session.

Use the *Student Data Entry* screen to find one of the students in the class, choose [Student Sign-In Sheet], then click [PRINT]. In the Print dialog box, choose “Records being browsed” for Print, and “All” for Print Range, then click [OK].



Sign-In Sheet for Class# BLS071409 - Heartsaver CPR Class
 Adult/Child CPR and Choking - (A)
 Lead Instructor: Tom Johnson, Location: Milltown Community Center
 Class starting on 7/14/2009, beginning at 1800 hours

1. Armstrong, Mark 445 Summit Ave, Milltown, NY 10900 (845) 555-1212 amark71@aol.com	_____
2. Bossert, Mary 115 Center St, Milltown, NY 10900 (845) 555-1212 Mary.Bossert@gmail.com	_____
3. Boyle, Richard 5 High St, Milltown, NY 10900 (845) 555-1212 boyle1991@yahoo.com	_____
4. Callahan, Elizabeth 178 Grand Ave, Milltown, NY 10900 (845) 555-1212 beth@CallahanCreations.com	_____
5. Drayton, Hugh 818 Broad St, Milltown, NY 10900 (845) 555-1212 Hugh@DraytonInc.com	_____
6. Farkas, Muriel 61 Walnut Ave, Milltown, NY 10900 (845) 555-1212 mfarkas@travelcity.com	_____
7. Glasser, Jim 250 River Rd, Milltown, NY 10900 (845) 555-1212 Jim@GlassWorks.com	_____
8. Guttman, Harry 12 Pleasant Ave, Milltown, NY 10900 (845) 555-1212 hguttman@milltownncc.edu	_____
9. Hunter, Anne 77 Woodside Ct, Milltown, NY 10900 (845) 555-1212 singingintherain@hotmail.com	_____
10. Keyes, Barbara 951 High St, Milltown, NY 10900 (845) 555-1212 BK@KeyesFamily.com	_____
11. Mauro, Joan 27 Linden Ave, Milltown, NY 10900 (845) 555-1212 mauromom@aol.com	_____
12. Meyer, Katherine 22 Chestnut St, Milltown, NY 10900 (845) 555-1212 kathemeyer@earthlink.net	_____
13. Potter, Bill 2551 Concord St, Milltown, NY 10900 (845) 555-1212 william.potter@tfsinc.com	_____
14. Soranno, Peter 54 Lake Terr, Milltown, NY 10900 (845) 555-1212 psoranno@yahoo.com	_____
15. Weissman, Jennifer 11 Ivy Ln, Milltown, NY 10900 (845) 555-1212 JWeissman@ABCInvest.com	_____

Update Student Information

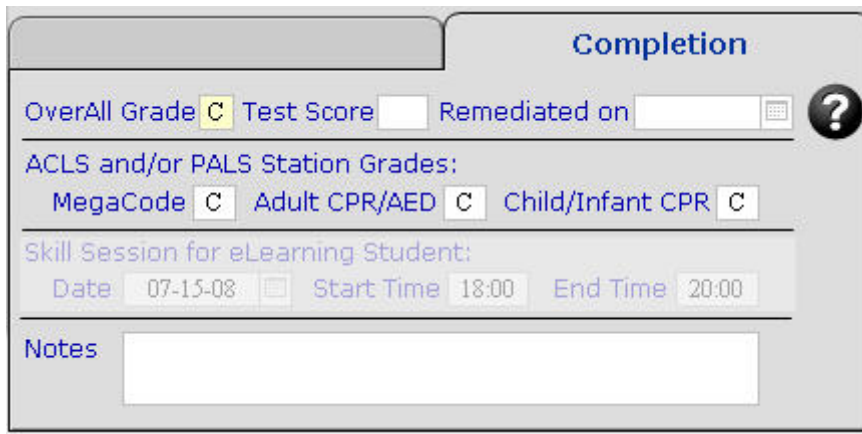
To update the information in a student record, use the *Student Data Entry* screen to find the record, click in the incorrect or empty field, and add or change the information.

Post Student Results

When the class is completed, post the student results.

Completion Tab

Use the *Completion* tab in the *Student Data Entry* screen to post student results after the class has been taught.



The screenshot shows the 'Completion' tab in a software interface. It contains several input fields and sections:

- OverAll Grade:** A dropdown menu with 'C' selected.
- Test Score:** An empty text input field.
- Remediated on:** A date picker field.
- ACLS and/or PALS Station Grades:** A section with three dropdown menus: 'MegaCode' (C), 'Adult CPR/AED' (C), and 'Child/Infant CPR' (C).
- Skill Session for eLearning Student:** A section with three date/time pickers: 'Date' (07-15-08), 'Start Time' (18:00), and 'End Time' (20:00).
- Notes:** A large empty text area.

A question mark icon is visible in the top right corner of the tab area.

If the course requires a written in-class test, enter each student's score for the test.

Note: If registering students before the class is taught, then change the OverAll Grade from the default of **C** for Complete to **I** for Incomplete, until the student results are available.

Remediation

When a student requires remediation, use the *Completion* tab in the *Student Data Entry* screen set his or her grade to **I** for Incomplete. Then after the student successfully completes his or her remediation, use the *Completion* tab to change the grade to **C** for Complete, and enter the date of the successful remediation.

Example

This student completed remediation successfully.

OverAll Grade **I** Test Score Remediated on

OverAll Grade **C** Test Score Remediated on **07-21-09**

Example for ACLS Station

This student completed remediation successfully for an ACLS station.

OverAll Grade **I** Test Score **92** Remediated on

ACLS and/or PALS Station Grades:
MegaCode **I** Adult CPR/AED **C** Child/Infant CPR **C**

OverAll Grade **C** Test Score **92** Remediated on **10-17-09**

ACLS and/or PALS Station Grades:
MegaCode **C** Adult CPR/AED **C** Child/Infant CPR **C**

Next Step

After all students have been registered, all student results have been posted, and all remediation has been completed, you can choose [Class Registration] to go directly to the *Class Registration* screen and e-mail the class roster to the Training Center.

Register a Student in Another Class

Existing students can be registered in other classes. The Roster Tool has two methods for handling this: use the same student record and change the class number, or else duplicate the student record and select a different class in the new copy of the student record. In other words, a student can be registered in one class at a time, or a student record can be duplicated so a student can be registered in more than one class at the same time.

One Record for the Student

After a student has completed a class and the roster has been submitted to the Training Center, the student can be registered in another class by selecting a different class in the student record.

Note: Do not change the class in a student record if you will need to print or e-mail information about the completed class again at any point in the future, or if you will need to refer to that information in the Roster Tool database.

Example

A student has taken a basic CPR class, and now is returning to renew.

Find the student's record for the earlier class and select the renewal class. The Roster Tool now has one record for this student with the new class.

Student Data Entry

Last Name	Callahan	Ext.	
First Name	Elizabeth	MI	
Address	178 Grand Ave		
City	Milltown		
State	NY	Country	USA
Zip	10900	plus 4	
Phone-work/home	(845) 555-1212		
E-mail Address	beth@CallahanCreations.com		
Employee ID			

[\[CLICK HERE\]](#) to assign student to class

Course Type	Heartsaver CPR Adult/Child CPR and Choking - (A)
Location	Milltown Community Center
Start Date	07-14-2009

Two years later ...

Course Type	Heartsaver CPR Adult/Child CPR and Choking - (A)
Location	Milltown Community Center
Start Date	07-12-2011

Example

To manage the paperwork for a weekend of classes, create all the classes.

Register all the students for the first class, post student results, and send the roster for the first class.

Then, in each student record, select the second class, update the student results as needed, and send the roster for the second class.

At the end of the weekend, the Roster Tool will have one record for each student, showing them all registered in the last class.

Duplicate Records for the Student

A student can be registered in another class by copying the student record and changing the class.

Example

A student has taken a basic CPR class, and now is returning to take a First Aid class.

Find the student’s record for the earlier class, click [COPY Student], and select the First Aid class to change the class. The Roster Tool now has a record of both classes taken by this student.

The image shows two screenshots of the 'Student Data Entry' form. The top screenshot shows a student record for 'Potter, Bill' with a 'Heartsaver CPR' class assigned. A callout points to the 'COPY Student' button. The bottom screenshot shows the same student record, but now with a 'Heartsaver First Aid - Pediatric' class assigned. A callout points to the 'COPY Student' button in the second screenshot. A second callout points to the 'Course Type' dropdown menu in the second screenshot, which now includes the new class.

1. Click [COPY Student]

2. Duplicate record is created

3. Use duplicate record to register student in another class

Register Students from Same Organization

If all the students in the class are from the same organization, and wish to keep personal addresses and phone numbers confidential, use the organization’s information in place of the student address and contact information.

Create one student record with the organization’s address and contact information, and select the class to register the student.

Then click [COPY Student] and change the student’s name to add the next student in the class, leaving the organization’s information and the assigned class the same.

Note: Update the OverAll Grade on the *Completion* tab as needed after duplicating the records.

Example

A class of police officers could use the police station address and contact information to protect individual officers’ privacy.

The image shows two screenshots of the 'Student Data Entry' form. The first screenshot shows the initial registration of a student named Richard Boyle. The second screenshot shows the same form after the 'COPY Student' button has been used to create a duplicate record for a student named Harry Guttman. Numbered callouts (1-6) explain the steps: 1. Register first student in class; 2. Use police station address; 3. Click [COPY Student] to duplicate student record; 4. Duplicate record is created; 5. Change student name; 6. Click [COPY Student] again to repeat this process.

1. Register first student in class

2. Use police station address

3. Click [COPY Student] to duplicate student record

4. Duplicate record is created

5. Change student name

6. Click [COPY Student] again to repeat this process

Manage Online Students

A student may use an online key to complete the knowledge part of a course outside of class. A student who completes an online course receives a certificate number indicating successful completion. The student can then attend a skill session to learn, practice, and demonstrate proficiency in the physical skills.

If a student presents an online completion certificate:

- Use the *Student Data Entry* screen to register the student in a class of the appropriate course type for this online course.
- On the *Preparation* tab in the *Student Data Entry* screen, set eLearning to **Yes**, then use the fields at the bottom of the tab to record the online course work.

Skill Session for Online Students

Students who have completed the knowledge portion of an online course can complete their course work in a skill session.

1. Create a class using the appropriate online course type. See [Create a New Class](#) on page 12.

Class Number	BLS091709
Course Type	BLS HCP Online

2. Register the student in the online class. See [Register a New Student](#) on page 26.
3. On the *Preparation* tab, do the following:

eLearning?	<input checked="" type="checkbox"/> Yes	Online Product #	80-1055
Completion Certificate #	AB0123456789		
Completion Certificate Date	9/5/2009		

- Click **Yes** for eLearning.
 - If the Online Product # is not displayed, use the product number on the student's completion certificate to update the course type in *General Setup*.
 - Enter the number and date from the student's completion certificate.
4. Post student results on the *Completion* tab. See [Completion Tab](#) on page 29.

OverAll Grade	C	Test Score		Remediated on	
Skill Session for eLearning Student:					
Date	09-17-09	Start Time	18:00	End Time	19:00

- Use the OverAll Grade field to record successful completion of this skill session.
- Leave the Test Score field blank as all written testing was completed online.
- Change the Skill Session Date and Start/End Time fields if necessary to reflect an individual student's work.

Online Students in an Instructor-Led Class

An online student can join a regular class to complete a skill session.

1. Register the online student in the appropriate class. See Register a New Student on page 26.

Note: Contact your Training Center if you need to know the right course type for the online course.

2. On the *Preparation* tab, do the following:

- Click **Yes** for eLearning.
- Enter the number and date from the student's completion certificate.
- Enter the Online Product # from the student's completion certificate.

Note: If the product number field is entered for one online student, then the information remains available for any other online students registered in the instructor-led class.

3. On the *Completion* tab, post results for the student.
 - Use the OverAll Grade field to record successful completion of this skill session.
 - Leave the Test Score field blank as all written testing was completed online.
 - Under the *Skill Session* heading, use the Date and Start/End Time fields to document the online student's actual class participation time.

Remediation for Online Students

If an online student needs skill remediation, use the Completion tab in the Student Data Entry screen to set OverAll Grade to I. Then when the student completes remediation, set the OverAll Grade to C and add the date in the Remediated on field. See Remediation on page 30 for further details.

Find Students

You can use the FileMaker Pro Find capability to search for a particular student or group of students.

In the *Student Data Entry* screen, click [FIND].

Use the fields in the screen to specify the student(s) you want to find, then click the [Find] button in the left-hand status area. After reviewing the student record(s), click [CANCEL FIND] to access all students in the Roster Tool again.

The screenshot shows the 'Student Data Entry' interface. On the left, a vertical status bar contains a 'Find' button. The main area is divided into several sections: a top section for personal information (Last Name, First Name, Address, City, State, Country, Zip, Phone-work/home, E-mail Address, Employee ID, Organization, Occupation, Department), a middle section for class assignment ([CLICK HERE] to assign student to class, Course Type, Location, Start Date), and a bottom section for training details (Preparation and Completion tabs, Type of training?, If renewing, current card valid?, Materials sent?, eLearning?, Online Product #, Completion Certificate #, Completion Certificate Date). On the right side, there is a vertical menu of buttons: Main Menu, NEW Student, COPY Student, Next Student >>, << Prev. Student, FIND, CANCEL FIND, SORT, DELETE, Class Registration, Sign-In Sheet, and Roster - Back. Three callout boxes with arrows point to specific elements: '1. Click [FIND] on the right' points to the FIND button in the right-hand menu; '2. Specify search criteria' points to the 'Find' button in the left-hand status bar and the various input fields in the main form; '1. Click [Find] on the left' points to the 'Find' button in the left-hand status bar.

Examples

Use one or more of the student information fields to specify the student or group of students.

To find all students living in the same town, use the zip code or city field to specify the town.

If you're not sure of the spelling of a name, enter only the first few letters, or enter * in place of some of the letters.

First Name

will find all students named Alec and Alex.

Last Name

will find all students named Jonson, Johnson, Johnston, and Johanson.

If you're sure of everything except one letter or number, use @ to replace the letter, or # in place of the number.

Last Name

will find all students named Smith and Smyth.

Sort Students

Students are stored in the order added to the Roster Tool database. To change the order of student records, click [SORT] and specify the order for the student records. See Sort on page 57.

Delete a Student

Use the *Student Data Entry* screen with the student record displayed.

Click [DELETE], then [Delete] to permanently delete the student from the Roster Tool database.

Note: Only delete a student from the Roster Tool if a pre-registered student did not attend class. A deleted student will not appear on the back of the roster.

Rosters

After students have been registered in classes, student results posted, and all remediation completed, rosters can be printed and/or e-mailed for submission to the Training Center so student cards can be printed.

Print a Roster

Print the front and back of the roster separately.

Front of Roster

The front of the class roster can be printed after the class is created.

Use the *Class Registration* screen to select the correct class, then choose [Roster - Front], click [PRINT] and [OK].

Class Registration

Main Menu

ADD Class

COPY Class

Next Class >>

<< Prev. Class

FIND

CANCEL FIND

SORT

DELETE


Student Data Entry

Class List

Roster - Front

Notify Training Center

E-mail Roster



American Heart Association Emergency Cardiovascular Care Program
HeartSaver CPR
Course Roster Form

PRINT CLASS REGISTRATION

Class# BLS071409 Training Center Name Training Headquarters
Class Location Milltown Community Center
Course Director _____
Lead Instructor Tom Johnson
 Current AHA PALS/ACLS Physician Instructor Available
Physician Name _____
Mankins Decontaminated by Tom Johnson

Initial Training Renewal Class

Class Start Date/Time 07/14/2009 1800 Class End Date/Time 07/14/2009 2000 Total Hours 2.0
Student-to-Mankin Ratio 4:1 Number of Cards Issued _____ Cards Mailed to Students _____

Assisting Instructors/Specialty Faculty (Attach copy of instructor cards for instructors aligned with other Training Centers)

Name	Instr. Card Exp. Date	Module/Station	Name	Instr. Card Exp. Date	Module/Station
1. Sawyer, Jill	01-16-10	Adult	7.		
2. King, Peter	01-06-10	Child	8.		
3. Alice, Byrne	12-07-09	Choking	9.		
4.			10.		
5.			11.		
6.			12.		

I verify that this information is accurate and truthful and that it may be confirmed. This course was taught in accordance with national guidelines.
Note: Go to Student Data Entry to print back of roster

Signature of Course Director/Lead Instructor _____ Date _____

Back of Roster

The back of the class roster can be printed after student results have been posted.

The header for the list of students includes the class number if used, course type, Heartsaver sub-options if applicable, lead instructor, teaching location, class start date and start time. Each student's name, address and home phone are given, with type of training (initial/renewal), written test score if applicable, remediation date if applicable, and whether the class was completed successfully. The card issue date is left blank for the Training Center to complete.

For students with online keys, the completion certificate number is included. Rosters for online courses include the date, start time, and end time of each student's actual skill session, and whether the student completed the skill session successfully.

In the *Student Data Entry* screen, confirm a student in the correct class is displayed, or else select a student in the correct class, then choose [Roster - Back] and click [PRINT]. In the Print dialog box, choose "Records being browsed" for Print, and "All" for Print Range, then click [OK].

Student Data Entry

Main Menu

ADD Student

COPY Student

Next Student >>

<< Prev. Student

FIND

CANCEL FIND

SORT

DELETE

Class Registration

Sign-In Sheet

Roster - Back

Student Roster for Class # BLS071409 - Heartsaver CPR Class

Adult/Child CPR and Choking - (A)

Lead Instructor: Tom Johnson, Location: Milltown Community Center

Class starting on 7/15/2008, beginning at 1800 hours

PRINT

STUDENT DATA ENTRY

Name <small>(Online Completion #if applicable)</small>	Address	Phone (home)	First-Time Student *	Examination Score (Optional)	Remediation Completed	Course Completed	Date Card Issued
1. Armstrong, Mark	445 Summit Ave Milltown, NJ 10900	(845) 555-1212	Yes	90		C	
2. Bossert, Mary	115 Center St Milltown, NJ 10900	(845) 555-1212	Yes	95		C	
3. Boyle, Richard	5 High St Milltown, NJ 10900	(845) 555-1212	Yes	85	07-21-09	C	
4. Callahan, Elizabeth	178 Grand Ave Milltown, NJ 10900	(845) 555-1212		90	07-21-09	C	
5. Drayton, Hugh	818 Broad St Milltown, NJ 10900	(845) 555-1212	Yes	85	07-21-09	C	
6. Farkas, Muriel	61 Walnut Ave Milltown, NJ 10900	(845) 555-1212	Yes	100	07-21-09	C	
7. Glasser, Jim	250 River Ed Milltown, NJ 10900	(845) 555-1212	Yes	95		C	
8. Guttman, Harry	12 Pleasant Ave Milltown, NJ 10900	(845) 555-1212		100		C	
9. Hunter, Anne	77 Woodside Ct Milltown, NJ 10900	(845) 555-1212	Yes	90		C	
10. Keyes, Barbara	951 High St Milltown, NJ 10900	(845) 555-1212	Yes	85		C	
11. Mauro, Joan	27 Linden Ave Milltown, NJ 10900	(845) 555-1212	Yes	95		C	
12. Meyer, Katherine	22 Chestnut St Milltown, NJ 10900	(845) 555-1212	Yes	90	07-21-09	C	
13. Potter, Bill	2551 Concord St Milltown, NJ 10900	(845) 555-1212	Yes	100		C	
14. Soranno, Peter	54 Lake Terr Milltown, NJ 10900	(845) 555-1212	Yes	80		I	
15. Weissman, Jennifer	11 Ivy Ln Milltown, NJ 10900	(845) 555-1212	Yes	85	07-21-09	C	

* Student taking this AHA course for the first time

Next Step

After a roster is printed, e-mail it to the Training Center if appropriate, and then use the *Class Registration* screen to mark the roster as submitted. See Mark a Roster Submitted on page 17.

E-mail a Roster

Before using the Roster Tool to e-mail a roster, confirm that you have a functional e-mail program on the same computer as the Roster Tool. Also check the back of the roster (use [Roster – Back] in the *Student Data Entry* screen) to confirm the class has students.

The front and back of the roster can be e-mailed to the Training Center after the student results have been posted. Send the entire roster by e-mail, using the automated process or the manual process.

Training Centers can recreate the class in WorldPoint ONE, based on the class information in the e-mail, then import the student list attachment and print the student cards.

Use the *Class Registration* screen to select the correct class, then choose [E-mail Roster].

Class Registration

Main Menu

ADD Class

COPY Class

Next Class >>

<< Prev. Class

FIND

CANCEL FIND

SORT

DELETE

Student Data Entry

Class List

Roster - Front

Notify Training Center

E-mail Roster

Submit Roster by E-mail

CLASS REGISTRATION

Automatic E-mail

Manual E-mail

Automatic e-mailing is available if you use Outlook/Outlook Express, MS Entourage/Mail or OS X Mail.

To: jsmith@TrainingHeadquarters.org

Cc:

Subject: Heartsaver CPR Class# BLS071409 Electronic Roster from Tom Johnson

Attachments ... C:/Documents and Settings/Carol/My Documents/WorldPoint Roster Tool/Attachments/BLS22_071409_1800.tab

This e-mail is to submit data for a class:
 Class# BLS071409 - Heartsaver CPR - Initial Training.
 This course was taught with the following sub-options:
 Adult/Child CPR and Choking - (A).

The class was held at Milltown Community Center, 125 Main St, Milltown, NY 10900.
 It started on July 14, 2009 at 18:00 and ended the same day at 20:00, for a total of 2.0 class hours.

A student-to-manikin ratio of 4:1 was established. Please send 15 wallet card(s) to Students.

The lead instructor was Tom Johnson, ID# 22, Exp. Date: 7/14/2011, and assisting instructor(s) were:
 ID# 23BLS, Sawyer, Jill, Exp. Date: 1/16/2010 - Instruction Module/Topic = Adult.
 ID# 24, King, Peter, Exp. Date: 1/6/2010 - Instruction Module/Topic = Child.
 ID# 26, Byrne, Alice, Exp. Date: 12-7-2009 - Instruction Module/Topic = Choking.

The manikins were cleaned by Tom Johnson. Thank you for your prompt attention to this class submittal.
 Regards, Tom Johnson

Place this e-mail in your outbox

Automated E-mail

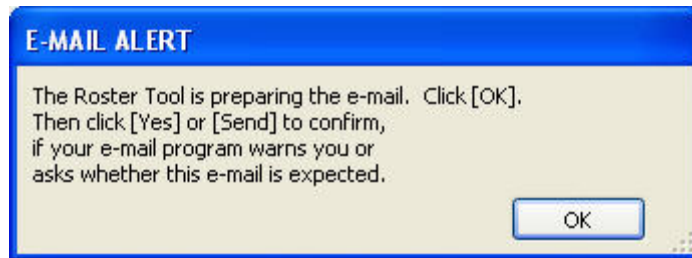
Before using the automated process, confirm the following:

- You are connected to the Internet.
- The Training Center e-mail address has been added in *General Setup*.
- You are using Outlook, Outlook Express, MS Entourage, Mail, or OS X Mail as your default e-mail program.

To send the roster to the Training Center by e-mail, follow these steps:

1. Choose [E-mail Roster] from the *Class Registration* screen.
2. Choose the *Automatic E-mail* tab in the roster e-mail screen.
3. Review the class information in the roster e-mail.
4. Click [Place this e-mail in your outbox] to send the roster e-mail, along with the automatically attached student list, to your e-mail program.
5. Warnings are displayed to protect against viruses sending e-mails.

When you see this message:

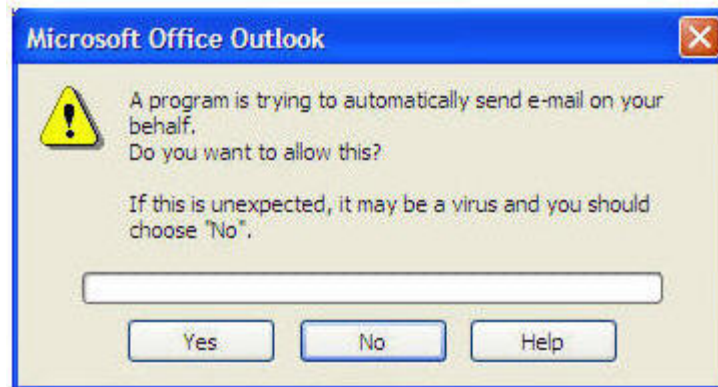


click [OK] to continue sending the e-mail from the Roster Tool.

6. If you receive a message like this:



or like this:



choose [Yes] or [Send] to allow communication from the Roster Tool to your e-mail program.

Note: If you receive one of these messages immediately after clicking [Place this e-mail in your outbox], then confirm the e-mail and send it. However, if you receive this warning at any other time, then do not confirm the e-mail as it may be caused by a virus.

7. Then, depending on the settings in your e-mail program, you may need to check the outgoing mailbox and send the e-mail, if you want it to go out right away.

Example

If you are using MS Outlook Express, then choose the Automatic E-mail tab.

The screenshot shows the 'Automatic E-mail' dialog box in Outlook Express. The 'To' field contains 'jsmith@TrainingHeadquarters.org'. The 'Subject' is 'Heartsaver CPR Class# BLS071409 Electronic Roster from Tom Johnson'. The 'Attachments' field shows a file path: 'C:/Documents and Settings/Carol/My Documents/WorldPoint Roster Tool/Attachments/BLS22_071409_1800.tab'. The main text area contains the following information:
This e-mail is to submit data for a class:
Class# BLS071409 - Heartsaver CPR - Initial Training.
This course was taught with the following sub-options:
Adult/Child CPR and Choking - (A).
The class was held at Milltown Community Center, 125 Main St, Milltown, NY 10900.
It started on July 14, 2009 at 18:00 and ended the same day at 20:00, for a total of 2.0 class hours.
A student-to-manikin ratio of 4:1 was established. Please send 15 wallet card(s) to Students.
The lead instructor was Tom Johnson, ID# 22, Exp. Date: 7/14/2011, and assisting instructor(s) were:
ID# 23BLS, Sawyer, Jill, Exp. Date: 1/16/2010 - Instruction Module/Topic = Adult.
ID# 24, King, Peter, Exp. Date: 1/6/2010 - Instruction Module/Topic = Child.
ID# 26, Byrne, Alice, Exp. Date: 12-7-2009 - Instruction Module/Topic = Choking.
The manikins were cleaned by Tom Johnson. Thank you for your prompt attention to this class submittal.
Regards, Tom Johnson
At the bottom of the dialog is a button labeled 'Place this e-mail in your mailbox'. Three callout boxes point to the 'Automatic E-mail' tab, the class information text, and the 'Place this e-mail in your mailbox' button.

1. Choose the Automatic E-mail tab

2. Review class information

3. Click here

The screenshot shows an 'E-MAIL ALERT' dialog box with the following text:
The Roster Tool is preparing the e-mail. Click [OK].
Then click [Yes] or [Send] to confirm.
If your e-mail program warns you or asks whether this e-mail is expected.
There is an 'OK' button at the bottom right. A callout box points to the 'OK' button.

4. Click [OK]

The screenshot shows an Outlook Express dialog box with a yellow warning icon. The text reads:
A program is attempting to send the following e-mail message on your behalf:
To: [Empty field]
Subject: Heartsaver CPR Class# BLS071409 Electronic Rost
Would you like to send the message?
There are 'Send' and 'Do Not Send' buttons at the bottom. A callout box points to the 'Send' button.

5. Click [Send] if this message is displayed

The screenshot shows the 'Outbox' window in Outlook Express. The subject line of the email is 'Heartsaver CPR Class# BLS071409 Electronic Roster from Tom Johnson'. A callout box points to the subject line.

6. Check your e-mail outbox, and send roster e-mail if necessary

Manual E-mail

Use the manual process if Outlook, Outlook Express, MS Entourage, Mail, or OS X Mail is not set up as your default e-mail program.

1. Choose [E-mail Roster] from the *Class Registration* screen.
2. Choose the *Manual E-mail* tab in the roster e-mail screen.
3. Review the class information to confirm this is the correct class to submit.
4. Click [Copy message content to clipboard] to copy the text of the e-mail, and then paste it into a new e-mail in your e-mail program.
5. Attach the student list to the e-mail.

Browse to find the list of students in the class. The list, automatically generated by the Roster Tool, is located in My Documents\WorldPoint Roster Tool\Attachments folder. The filename includes the class type, lead instructor ID, start date, and start time, in this format:

TYPEID_MMDDYY_HHMM

where TYPE is the class type (BLS, ACLS, PALS, FA, MISC, or ONLINE), ID is the lead instructor ID, MMDDYY is the class start date, and HHMM is the class start time.

6. Send the e-mail to your Training Center, with the class type and lead instructor name in the subject line.

The screenshot shows the 'Manual E-mail' interface. At the top, there is a tab labeled 'Manual E-mail' with a question mark icon. Below the tab, there is a text area containing class information. A button labeled 'Copy message content to clipboard' is positioned above the text area. At the bottom, there is a text field for the file path: 'C:/Documents and Settings/Carol/My Documents/WorldPoint Roster Tool/Attachments/BLS22_071409_1800.tab'. Four numbered callouts point to specific elements: 1. 'Choose the Manual E-mail tab' points to the tab; 2. 'Review the class information' points to the text area; 3. 'Click here, then create a new e-mail and paste in the class information' points to the 'Copy message content to clipboard' button; 4. 'Attach this file to the new e-mail' points to the file path text field.

1. Choose the Manual E-mail tab

2. Review the class information

3. Click here, then create a new e-mail and paste in the class information

4. Attach this file to the new e-mail

Example

1. If you are using AOL, then choose the *Manual E-mail* tab in the Roster Tool.
2. Make sure the correct class is described on the *Manual E-mail* tab.
3. In AOL, create a new e-mail. In the Roster Tool, use the [Copy message content to clipboard] button to copy the class information. In AOL, paste the class information into the new e-mail.
4. Use the information at the bottom of the *Manual E-mail* tab to find the list of students, and attach it to the new e-mail in AOL.
5. In the new AOL e-mail, add the Training Center e-mail address, include the course type in the subject line, and send the new e-mail.

Next Step

After a roster has been e-mailed to the Training Center (and printed if applicable), then use the *Class Registration* screen to mark the roster as submitted. See Mark a Roster Submitted on page 17.

Appendix

Refer to this appendix to enhance your understanding and use of the Roster Tool.

Advanced Setup

The Roster Tool provides capabilities in *General Setup* to change information and settings as needed.

- Change name and logo for national organization
- Choose paper size
- Manage course types

National Organization Name

To change the name of the national organization displayed on the front of the roster, follow these steps:

1. Use the *Training Center* tab in *General Setup*.
2. Highlight the existing national organization.
3. Type the new name.

Logo

To change the logo displayed on the Roster Tool main menu, follow these steps:

1. Obtain the desired logo in JPEG format.
2. Crop blank areas around logo if necessary.
3. Use the *Training Center* tab in *General Setup*.
4. Click [Insert Logo].
5. Browse to select the new logo.

Paper Size

Use the radio buttons on the *Settings* tab in the *General Setup* screen for paper format to choose letter size (8.5 x 11) or European size (A4).

The Roster Tool setting for paper size controls the date format in the text of the e-mails. When paper size is set to US Letter, class dates in the roster e-mail are displayed in the “Month Day, Year” format; when paper size is set to A4, class dates in the roster e-mail are displayed in the “Day Month Year” format.

Note: The language choice in the operating system controls the date format in the *Class Registration* screen, so if the language choice is for American English, then the date format is MM/DD/YYYY. Other language choices can be made in the operating system if the DD/MM/YYYY format is needed.

Prepare for Upgrade

If an upgrade becomes available for the Roster Tool, click [Prepare for upgrade] on the *Settings* tab in *General Setup* before installing the upgrade. This will create a Transfer folder in the WorldPoint Roster Tool folder containing tab-delimited data for your instructors, classes, and students.

Note: Make a note of any custom course types you have added to the Roster Tool, as they are not preserved by clicking [Prepare for upgrade].

Course Types

In the *General Setup* screen, choose the *Course Types* tab to review the standard courses available with the Roster Tool, and to add new course types if applicable.

CATEGORY	Name of Course Type	Product #
ACLS	ACLS Instructor	
ACLS and PALS Program Instructor Courses		
ACLS	ACLS Provider	
Advanced Cardiovascular Life Support and Pediatric Advance Life Support		
ACLS	ACLS-EP Instructor	
ACLS and PALS Program Instructor Courses		
ACLS	ACLS-EP Provider	
Advanced Cardiovascular Life Support and Pediatric Advance Life Support		
BLS	BLS Instructor	
Basic Life Support Program Instructor Courses		

Review Course Types

Use the scroll bar to review the list of available course types.

Add New Course Type

Additional course types can be added to the Roster Tool, if needed for your classes.

Complete the appropriate fields at the top of the screen, choosing the category as appropriate, and click [ADD Course].

Note: Use MISC (Miscellaneous) for custom course types; use ONLINE for classes with online knowledge components.

Course Types

Enter data for new Course Type, then click [ADD Course].

CATEGORY Name of Course Type Product #

Course description for front of roster

ADD Course

ACLS	ACLS Instructor	
ACLS and PALS Program Instructor Courses		
ACLS	ACLS Provider	
Advanced Cardiovascular Life Support and Pediatric Advance Life Support		
ACLS	ACLS-EP Instructor	
ACLS and PALS Program Instructor Courses		
ACLS	ACLS-EP Provider	
Advanced Cardiovascular Life Support and Pediatric Advance Life Support		
BLS	BLS Instructor	
Basic Life Support Program Instructor Courses		

Note: Keep a record of the custom course types you add to the Roster Tool. If new course types become available in the future, downloading an update for the new course types will delete your custom course types in the Roster Tool, and you will need to add them again.

Change Course Type

To change a course type, click in the incorrect or empty field, and add or change the information.

Delete Course Type

The course types provided with the Roster Tool and any course types you add are protected from accidental deletion.

If any of these course types are not needed for current or future classes, they can be deleted.

Note: Please delete course types with caution, as this action is irreversible.

1. Use the *Settings* tab in *General Setup* and choose **Yes** for Enable DELETE for course types to remove the protection.
2. Choose the *Course Types* tab.
3. Locate the course type to be removed from the Roster Tool, click its [DELETE?] button, then click [Delete] to confirm the deletion.
4. After deleting unneeded course types, return to the *Settings* tab in *General Setup* and choose **No** for Enable DELETE for course types to protect the remaining course types once again.-

Using an Application Based on FileMaker® Pro

The Roster Tool stores information in a FileMaker Pro database.

Required Fields

Fields with yellow backgrounds are required for full Roster Tool functionality.

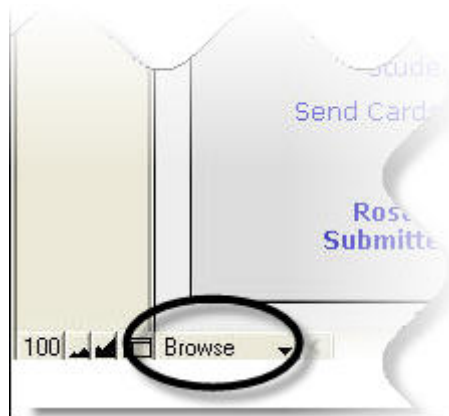
Note: When adding a new class in the *Class Registration* screen, the course type field must be completed before attempting any other task.

Course Type	Heartsaver CPR
-------------	----------------

Find and Browse Modes

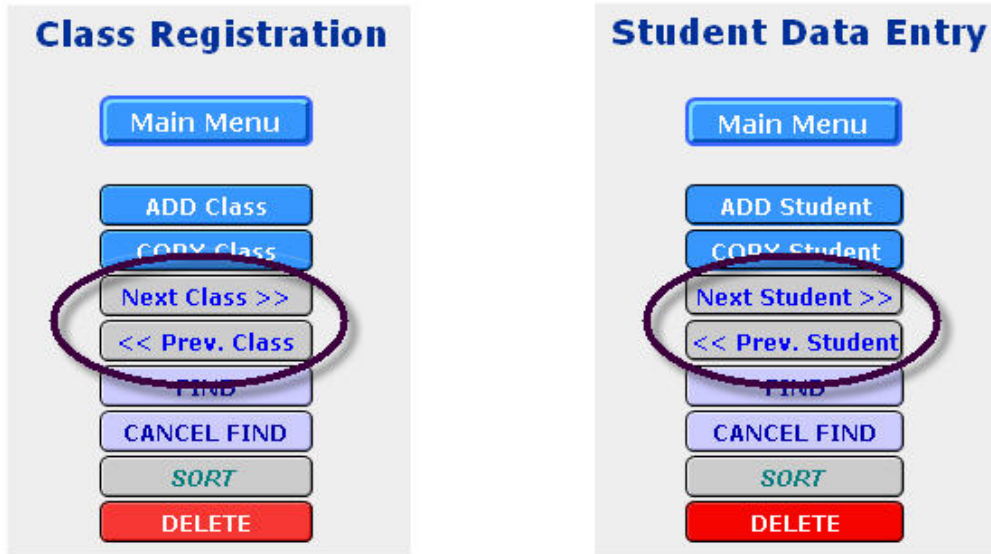
You will do all your work in the Roster Tool in the Browse mode, except when finding a group of records.

Always add and review records in Browse mode. Check the mode at the bottom of the screen, and do not attempt to add records in Find mode.



Reviewing Records

Class and student records are stored in the order entered. To review these records in the *Class Registration* screen or the *Student Data Entry* screen, use the [Next] and [Previous] buttons on the screen, or the icons in the left-hand status area. See Sort on page 57 to change the order of the records.

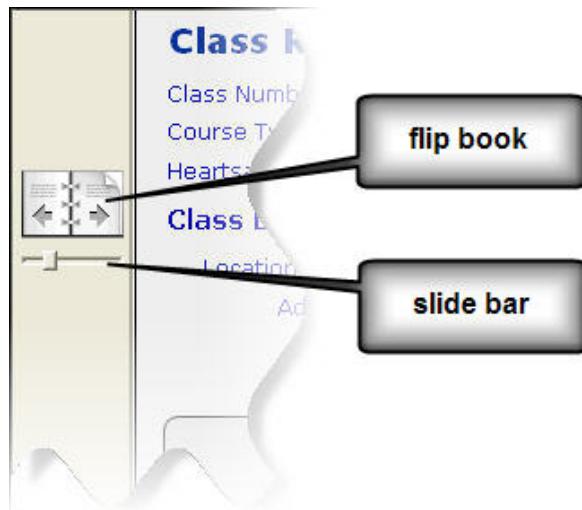


Status Area

On the left-hand side of the Roster Tool screen, the status area provides capabilities to scroll through class and student records.

Click the arrows on the pages of the flip book icon to display the records one by one.

Use the slide bar under the flip book to move quickly through the records.



Keyboard Shortcuts

After learning to use the Roster Tool, you may prefer to use these keyboard shortcuts.

Key(s)	Action
Ctrl ' (single quote)	Fill this field with data from last record entered
Ctrl F	Find
Ctrl I	Show indexed history of data entered in a field *
Tab	Move to next field
Shift Tab	Move to previous field

When using a two key shortcut, hold down the first key while pressing the second key, then release both keys.

Note: On a Macintosh keyboard, the Ctrl key is the four-leaf clover.

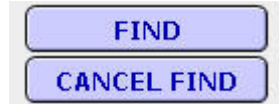
* Data history

While entering data or choosing search criteria for a find, you may access data previously entered in the database.

1. Position the cursor in a field.
2. Using the keyboard, hold down the [Ctrl] key and press [I].
3. Review the indexed history for this field.
4. Select the appropriate field, then click [Paste].

Find

FileMaker Pro software provides extensive search capabilities for finding individual students, groups of students, specific classes, and groups of classes.



1. Click the [FIND] button on the right in the *Class Registration* or *Student Data Entry* screen.
2. Specify the records to find by entering or selecting data in the field(s).
3. Click the [Find] button on the left in the status area.
4. Review the selected record(s).
5. Click [CANCEL FIND] to access all records in the Roster Tool database again.

Note: Always click [CANCEL FIND] after performing a Find, before attempting to add new records to the Roster Tool. Do not add new classes or students while in Find mode. After performing a find always check the last line on the screen, to make sure it shows Browse instead of Find, before adding more records.

Example: Students at a class location

To find all students who trained at the community center, use the Location field in the *Student Data Entry* screen, with the search criteria “Milltown Community Center”.

Example: Students needing recertification

To find all students needing recertification in the next six months, use the Start Date field on the *Student Data Entry* screen to search for students in classes starting at least 18 months ago, with a search criteria such as “<01-01-2008” to indicate dates earlier than January 1, 2008.

Example: Planned classes

To find all classes planned within a date range, use the Start Dates field on the *Class / Skill Session Data* tab in the *Class Registration* screen, with a date range for the search criteria such as “08-01-2009 ... 08-31-2009” to find all classes starting in August.

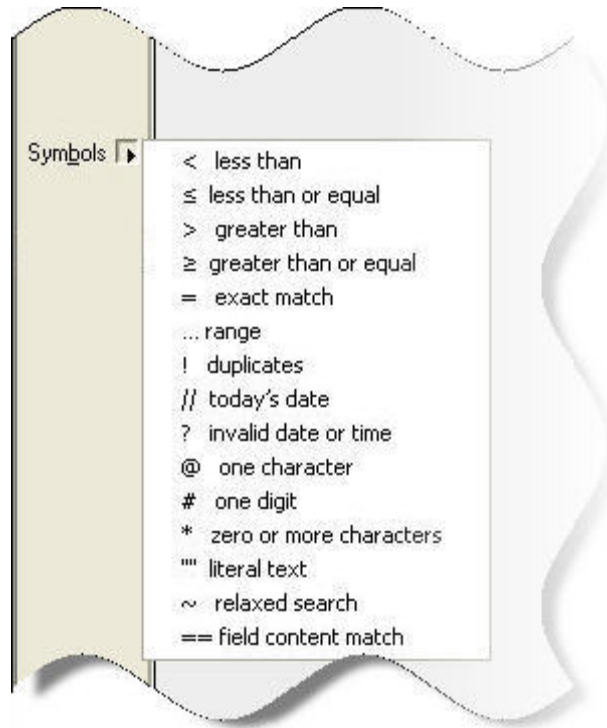
Example: Classes taught by an instructor

To find all classes taught by a particular instructor, use the Lead Instructor and Assisting Instructor fields on the *Instructor Data* tab in the *Class Registration* screen, with the instructor’s ID or name as search criteria.

Search symbols

Use symbols from the left-hand status area to refine your searches.

In Find mode, position the cursor in the correct field and select a symbol from the dropdown list, then enter the data you want to find, or else type the symbol while entering the data you want to find.

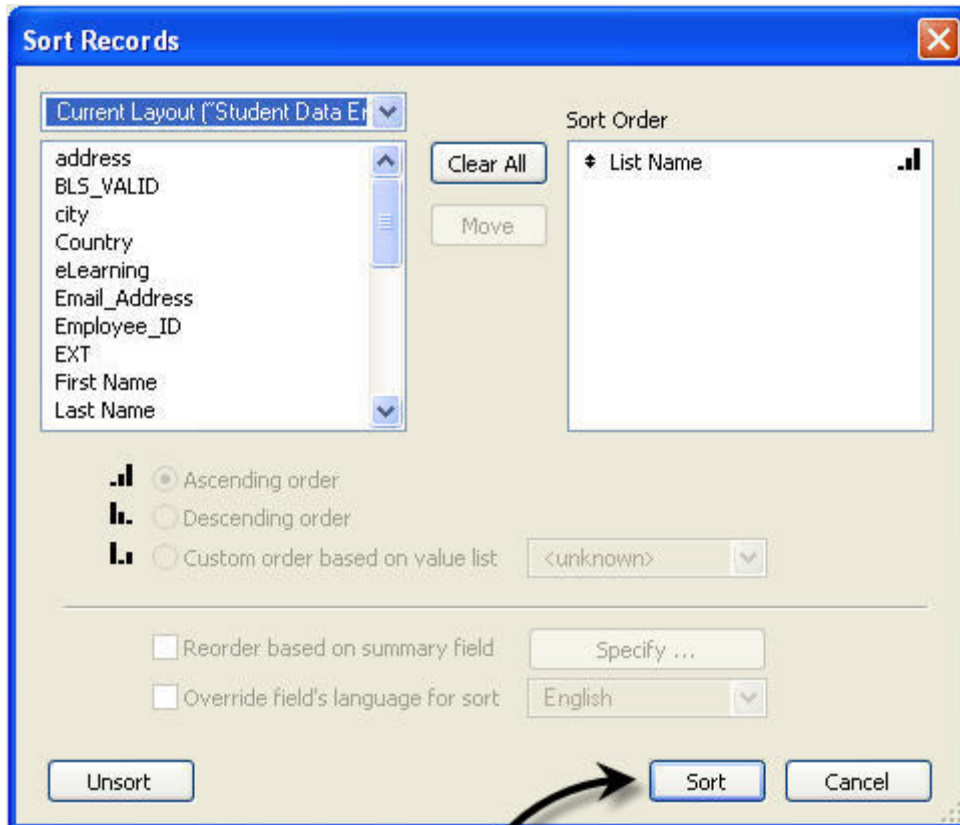


+

Symbol	Name	Example
*	wild card	Last Name: Sm*th to find Smith, Smyth, and Smooth
=	exact match	Last Name: =Smith to find only students named Smith
<	less than	Registered: <24 to find classes with less than 24 students
>	greater than	Start Date: >06152009 to find classes after June 15
...	range	Start Date: 08/01/2009...08/31/2009 to find all classes starting in August

Sort

Class and student records are stored in the Roster Tool database in the order entered. These records can be sorted into a different order, based on the fields you select as sort criteria. Click the [SORT] button in the *Class Registration* or *Student Data Entry* screen to see the list of fields that can be used to sort the records.



If you want students in order by last name, or classes in order by start date and course type, then click [Sort] to use the sort criteria already in the Sort Order list.

Custom Sort

If you want to sort by other criteria, then use the *Sort Records* dialog box to move the fields you want to use from the alphabetic list of fields on the left, to the Sort Order list on the right. Highlight each field, then click [Move] to add it to the Sort Order list.

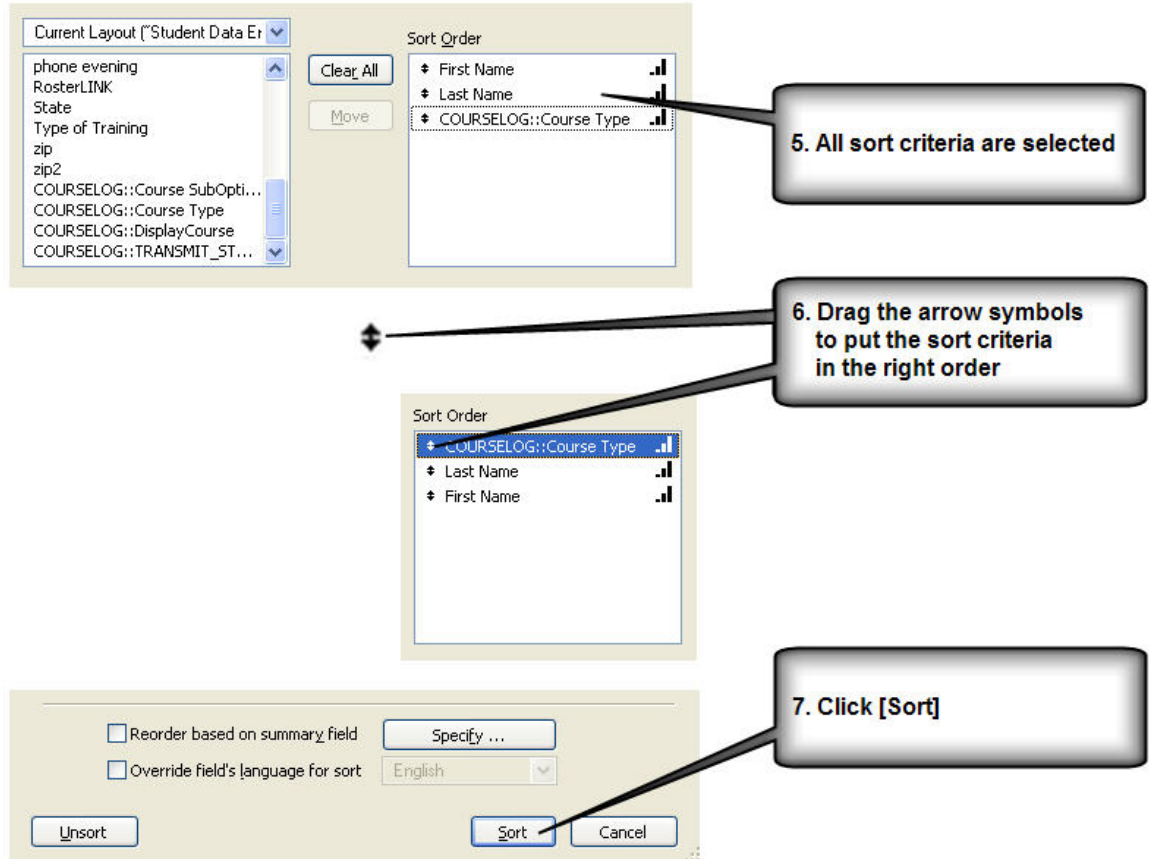
The image consists of four sequential screenshots of the 'Sort Records' dialog box, illustrating the steps to customize the sort order. Each screenshot shows a list of fields on the left and a 'Sort Order' list on the right.

- Step 1:** The 'Sort Order' list contains 'List Name'. A callout box points to the 'Clear All' button with the text: "1. Click [Clear All] to remove existing sort criteria".
- Step 2:** The 'Sort Order' list is now empty. A callout box points to the empty list with the text: "2. Existing sort criteria are removed".
- Step 3:** The field 'First Name' is highlighted in the left list. A callout box points to the 'Move' button with the text: "3. Highlight sort criteria".
- Step 4:** The fields 'First Name' and 'Last Name' are now in the 'Sort Order' list. A callout box points to the 'Move' button with the text: "4. Move sort criteria to Sort Order list".

To sort the student records by course type, then by student name, use First Name, Last Name, and COURSELOG::CourseType as sort criteria.

When the list of fields for sorting is complete, highlight and drag the arrow symbol in the Sort Order list to put the fields in the correct order, if necessary.

After the sort criteria fields are selected and in the correct order, then click [Sort].



After reviewing the records in the requested sort order, you can put the records back in the order they were entered, by clicking [SORT] on the Roster Tool screen, then [Unsort] in the *Sort Records* dialog box.

FileMaker Pro Messages

Most messages in the Roster Tool are self explanatory. Please refer to the following explanations, listed alphabetically, if necessary.

Commit Records/Requests has been canceled. Do you wish to continue with this script?

You have an incomplete class record open, and must either delete the new record or finish it before doing anything else.

To delete the incomplete class record, click [Cancel] once, then click [Delete] twice.

To finish creating the new class record, click [Continue] and add the Course Type field with the yellow background.

File Link is defined to require a value, but it is not available on this layout. Use another layout to assign a value to this field.

You clicked [NEW Class] to create a new class record, and then started another task. You must finish the new class record, or else delete the incomplete class record, before doing anything else.

To delete the incomplete class record, click [OK], then click [Cancel] twice.

To continue creating the new class record, click [OK], then [Revert], and add the Course Type for the new record.

No records are present. To create a new record choose the New Record menu command.

Click [OK], then click the [NEW Class] or [NEW Student] button to create a new record.

Print has been canceled. Do you wish to continue with this script?

Click [Cancel] to return to the displayed report.

Revert all changes to this record since it was last entered?

You have an incomplete class record open, and must either delete the new record or finish it before doing anything else.

To delete the incomplete class record, click [Cancel] twice, then [Delete] twice.

To finish creating the new class record, click [Revert] and add the Course Type field.

Backup and Restore

Protect the valuable data in your Roster Tool.

Backup

Perform backups on a regular basis.

1. Return to the Roster Tool main menu and click [QUIT] to exit.
2. Access “My Documents” to find the WorldPoint Roster Tool folder.
3. Copy the entire folder to external media.

Note: Store and rotate backups carefully.

Restore

If you need to reinstall the Roster Tool, back up the entire WorldPoint Roster Tool folder, and write down any custom course types you have added.

Delete the old WorldPoint Roster Tool folder, then reinstall the Roster Tool from the CD again, and restore your data by copying all files starting with TCI_ from the backup to the WorldPoint Roster Tool folder.

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