Workshop Calendar CITF Registration Enhancements

CARPENTERS INTERNATIONAL TRAINING FUND
9/2/20

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Document Conventions

CR Change Requirement (All change requirements are new)

■ BR Business Rule

[NEW] A new business rule or data field.

[UPDATED] Existing business rule or data field that has been updated.[EXISTING] Existing business rule which still applies to the change.

DT Data Table

MU Screen or Report Mock-up

Data Types (shown in Data Tables)

- String A series of characters that can be alpha, special, or numeric. This data type is used to categorize data when there is not a more specific type that applies. Examples of a string are: Good Standing, email123@email.com, and Level 1.
- Integer A whole number (not a fractional number) that can be positive, negative, or zero. Examples of integers are: -5, 0, 3, 97, and 7,003.
- **Float** (short for a floating-point unit number) A number with a fractional value that can be positive or negative. Examples of floating-point numbers are: -175.76, 1.25, and 789.45
- **Date/Time** A date, time, or date and time value. Examples of date/time are: 01/01/2017, 12:00 AM, January 1, 2017 12:00 AM, and 1/1/2017 12:00 AM.
- **Boolean** A data type which only has a true or false value.

Statement of Purpose

The Carpenters International Training Fund (CITF) offers hundreds of workshop sessions every year. Users can view a current schedule on the calendar posted within the CITF Registration website but have limited options to search for specific sessions.

In addition, the current calendar does not provide an option to identify training center closures, which is needed for scheduling. This information is currently tracked outside of the system.

Scope of Work

Workshop Calendar

The workshop calendar on the CITF Registration website currently excludes hidden workshop sessions and only provides the option to filter the sessions that are displayed on the calendar by the workshop group.

- Provide the option to display hidden workshop sessions on the calendar for users with Manager and Administrator access to the website.
- Add a universal search option to the calendar to search for workshop sessions by the workshop name, start date, or end date.
- Add an option to filter the workshop sessions displayed on the calendar based on the Technical Coordinator assigned to the workshop.
- Provide an option to print the workshop calendar in PDF format.

Training Center Closures

Update the CITF Registration website with functionality that allows users to identify dates when the Training Center is closed and display the closure dates on the workshop calendar.

- Only users with Manager and Administrator access to the website have the option to add, edit, or delete Training Center closures.
- Each Training Center closure requires a start date, end date, and reason.
- The workshop calendar displays each Training Center closure under the corresponding date(s) including the reason.
- Workshop sessions can still be scheduled on dates that the Training Center is closed.

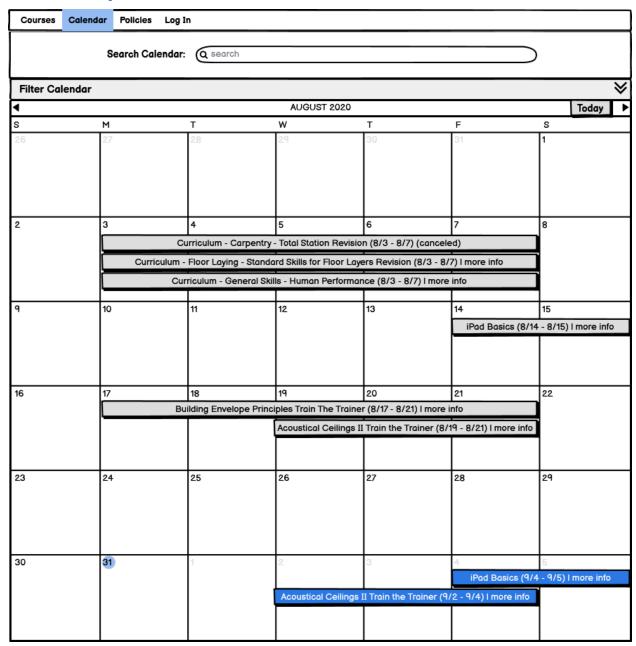
Change Requirements

Workshop Calendar Universal Search

- **CR1** Add a universal search option to the workshop calendar.
- **BR1** [EXISTING] The Workshop Calendar can be viewed by user with and without a login.
- **BR2** [EXISTING] The Workshop Calendar displays workshop sessions scheduled within the Maximum Calendar Date saved under Administration >> Preferences >> Sessions.
- BR3 [EXISTING] Canceled workshop sessions are displayed on the Workshop Calendar.
- **BR4** [EXISTING] Scheduled sessions of hidden workshops are excluded from the calendar by default.
- **BR5** [EXISTING] Each scheduled session has an option to view more information, which displays the workshop description.
- **BR6** [EXISTING] Users with a login can view options to register and generate a class roster for each scheduled session.
- BR7 [NEW] The universal search option is available to all users with and without a login.
- **BR8** [NEW] The system searches for scheduled workshop sessions, which contain the characters entered in the universal search option.
- **BR9** [NEW] Matching workshop sessions are displayed in a list including the workshop name, session start date, session end date, and the workshop group.
- **BR10** [NEW] Upon selecting a workshop session from the universal search results, the system directs the user to the corresponding month/year and highlights the workshop on the calendar.

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MU1: Workshop Calendar - Default View



MU2: Workshop Calendar - Universal Search

Courses	Calendar Administra	ation Policies He	lp Log Out				
	Search Cale	endar: Q acoustica	I				
		Acousti	cal Ceilings I Train	the Trainer (6/8/2020) - 6/12/2020) (1 Inter	national Training Cen	ter Train-The-Trainer Workshops
Filter Cale	endar	Acousti	cal Ceilings II Trair	the Trainer (8/19/20	20 - 8/21/2020) (1 Inte	rnational Training Cer	nter Train-The-Trainer Workshop
•		Armstro	ong Acoustic, Seism	nic & Structural Solutio	ns Train The Trainer (2	2/24/2020 - 2/28/202	(5 Western District Conferen
		T Curricu	lum - Interior Syste	ms - Acoustical Ceilin	gs (12/15/2020 - 12/16	3/2020) (2 CITF Devel	lopment Committee Meetings)
S	M 27		100	00	04	- La	
	2/	28	29	30	31		
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	\dashv
16	17	18	19	20	21	22	
			Acoustical C	Jellings II Train the Tra	niner (8/19 - 8/21) I mo	re into	
23	24	25	26	27	28	29	
30	31)	1	2	3	4	5	

Workshop Calendar Filter

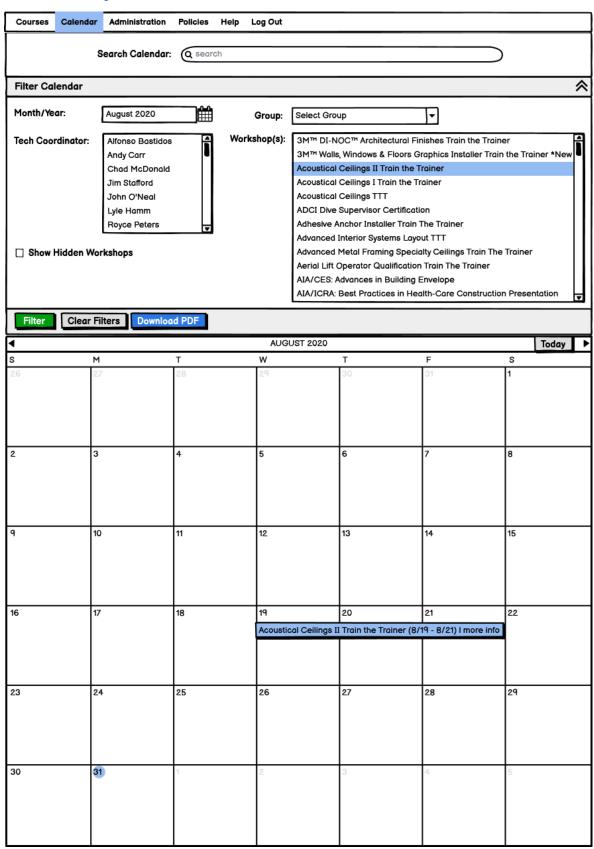
- CR2 Add a new Calendar Filter section, which allows users to filter the sessions displayed on the calendar.
- **BR11** [NEW] The Calendar Filter section is collapsed by default.
- **BR12** [NEW] All users with or without a login have the option filter the calendar based on selected criteria.
- **BR13** [NEW] Only workshop sessions that meet the selected criteria are displayed on the calendar.
- **BR14** [NEW] The option to show hidden workshops is only available to users who log into the website and have Administrator or Manager security access.
- **BR15** [NEW] When the option to show hidden workshops is selected, the Workshop(s) list shows hidden workshop and the Calendar displays hidden workshop sessions.

DT1: Workshop Calendar - Filters

Location: Calendar

Data Field	Description	Required	Data Type	Editable	Values	Format
Month/Year	Calendar month	Y	Date/Time	Y	Display month and year values.	[Month]
[EXISTING]	and year.					MM/DD/YYYY
Group [EXISTING]	Workshop groups.	N	String	Y	Display a list of workshop groups from the Courses page. Only a single workshop group can be selected at a time.	N/A
Tech Coordinator [NEW]	Technical Coordinator of a workshop.	N	String	Y	Display a multiselect list of Technical Coordinator names for all workshops. Technical Coordinators are designated under the Workshop Details.	[First Name] [Last Name]
Workshop(s) [NEW]	Workshop names.	N	String	Y	Display a multiselect list of workshop names.	N/A
Show Hidden Workshops [NEW]	Option to display hidden workshop sessions.	N	Boolean	Y	Display hidden workshop sessions on the Workshop(s) list and the Calendar when this option is selected.	N/A

MU3: Workshop Calendar - Filter



Workshop Calendar PDF

CR3 Provide an option to download a PDF report of the workshop calendar.

BR16 [NEW] An option to download a PDF of the workshop calendar is displayed within the Calendar Filter section of the page.

BR17 [NEW] The workshop calendar report can only be generated for a single month at a time.

BR18 [NEW] If the workshop calendar is filtered, the PDF report also reflects the filtered results.

DT2: Workshop Calendar PDF Data

Location: Calendar >> Filter Calendar (section) >> Download PDF

Filter: Apply the selected workshop calendar filters to the report

Data Field	Description	Required	Data Type	Editable	Values	Format
Month	The calendar	Υ	Date/Time	N	Display the calendar month.	[Month]
[NEW]	month.					
Year	The calendar	Υ	Integer	N	Display the calendar year.	YYYY
[NEW]	year.					
Workshop	The workshop	N	String	N	Display the workshop name within the	N/A
[NEW]	name.				corresponding calendar days.	
Session	The workshop	N	Date/Time	N	Display the session start date and end date.	(MM/DD/YYYY
[NEW]	session dates.					-
						MM/DD/YYYY)
Canceled	Indicates the	N	String	N	Display "(canceled)" next to the workshop	(canceled)
[NEW]	workshop				name if the session has been canceled.	
	session was					
	canceled.					
Report	The date and	Υ	Date/Time	N	Display the date and time the user	MM/DD/YYYY
Date/Time	time the report				generated the report.	
[NEW]	was generated.					HH:MM:SS
						AM/PM

MU4: Workshop Calendar PDF

Location: Calendar >> Filter Calendar (section) >> Download PDF

29	Monday 9 30	Tuesday 31	Wednesday 1	Thursday 2	Friday 3	Saturda
	5 6	7	8	9	10	
12	Building Envelope Principles Tr. 2 13	ain The Trainer (01/06/2020 - 0	15	16	17	
				Green Building Awareness Trai	l	
	WEED 270. Introduction to lad	t- - T - - (01/12/2020)	21 (15 (2020)	01/17/2020)		
	WFED 270 - Introduction to Ind WFED 105 - Integrated Curricul	* * * * * * * * * * * * * * * * * * * *				
	Door Hardware - Commercial T					
	WFED 197- Integrated Written					
	WFED 310 - Leadership Compe					
	WFED 207 - Assessment Techn WFED 413 - Vocational Educati			ł		ŀ
19		21	22	23	24	
26	6 27	28	29	30	31	
	WFED 100 - Orientation to Teach	thing (01/27/2020 - 01/29/2020	0)	j		
	WFED 428 - Fiscal Accounting a (01/27/2020 - 01/29/2020) (car	and Management for Workforce	Development Professionals			
	Total Station Train The Trainer		nceled)			ł
	WFED 106 - Program & Facilitie	s Management (01/27/2020 - 0	01/29/2020)			
	WFED 410 - Leadership Compe		7/2020 - 01/29/2020)			
	WFED 445 - Vocational Guidan		cancolod\			
	WFED 445 - Vocational Guidana WFED 471 - Training in Busines		•			

Workshop Calendar Report – Add Workshops Filter

- CR4 Add an option to filter the Workshop Calendar Report by Workshop(s).
- **BR19** [UPDATED] The workshop calendar report can be generated from the Calendar by selecting the Download PDF option from the Calendar Filter section.
- **BR20** [EXISTING] The workshop calendar report can be generated by all users with a login from the Reports menu.
- BR21 [NEW] Users can filter the calendar report by one or more workshops.
- **BR22** [NEW] Only users with Administrator or Manager access can filter the calendar report by hidden workshops.
- BR23 [EXISTING] The calendar report only displays workshop sessions scheduled within the Maximum Calendar Date saved under Administration >> Preferences >> Sessions.
- BR24 [EXISTING] Only users with Administrator or Manager access can generate a calendar report including workshop sessions scheduled beyond the Maximum Calendar Date saved under Administration >> Preferences >> Sessions.

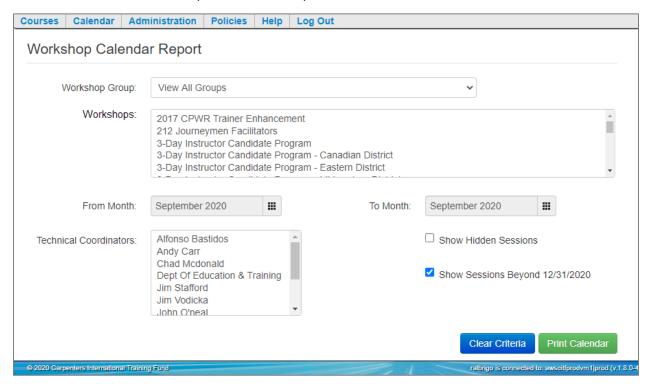
DT3: Workshop Calendar Report - Filter Options

Location: Administration >> Reports >> Workshop Calendar

Data Field	Description	Required	Data Type	Editable	Values	Format
Workshop	Workshop	N	String	Υ	Display a list of workshop groups.	N/A
Group	groups.					
[EXISTING]						
Workshops	Workshop	N	String	Υ	Display a multiselect list of workshop	N/A
[NEW]	names.				names including hidden workshops if the	
					user has Administrator or Manager access.	
From Month	The start month	Υ	Date/Time	Υ	Provide an option to select a starting	[Month] YYYY
[EXISTING]	of the calendar.				Month and Year value.	
To Month	The end month	Υ	Date/Time	Υ	Provide an option to select an ending	[Month] YYYY
[EXISTING]	of the calendar.				Month and Year value.	
Technical	Technical	N	String	Υ	Display a multiselect list of Technical	[First Name]
Coordinators	Coordinator				Coordinator names for all workshops.	[Last Name]
[EXISTING]	names.					
					Technical Coordinators are designated	
					under the Workshop Details.	
Show Hidden	Includes hidden	N	Boolean	Y	Display hidden workshop sessions on the	N/A
Sessions	workshop				report when selected.	
[EXISTING]	sessions on the					
	report.				This option is only available to users with	
					Administrator or Manager access.	
Show	Includes	N	Boolean	Y	Display workshop sessions scheduled	N/A
Sessions	workshop				beyond the current year on the report	
Beyond	sessions beyond				when selected.	
MM/DD/YYYY	the current year.				This ention is only available to use as with	
[EXISTING]					This option is only available to users with	
					Administrator or Manager access.	

MU5: Workshop Calendar Report - Workshops Filter

Location: Administration >> Reports >> Workshop Calendar



Training Center Closures

- CR5 Create a new page under the Preferences menu to view, add, edit, and delete training center closures.
- BR25 [NEW] Only users with Administrator or Manager access can view, add, edit, and delete training center closures.
- **BR26** [NEW] The start date, end date, reason, created or updated date and time, and created or updated by username of each closure is displayed.
- **BR27** [NEW] Training center closures for the current year are displayed by default.
- **BR28** [NEW] Each training center closure is highlighted and displayed on the Workshop Calendar for users with Administrator or Manager access only.
- **BR29** [NEW] The closure reason can be viewed in a tooltip by hovering over the entry on the Workshop Calendar.

DT4: Training Closures Data

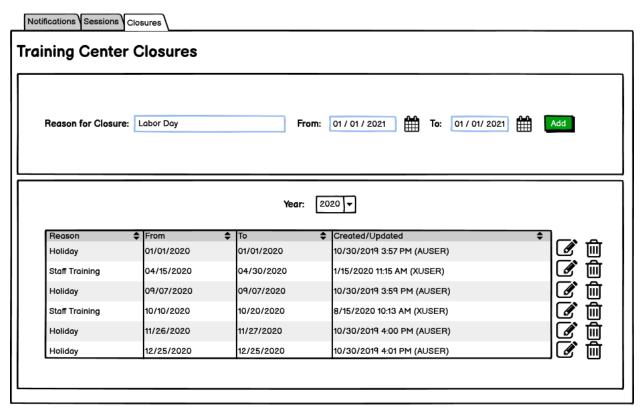
Location: Preferences >> Closures

Filter by: Year

Data Field	Description	Required	Data Type	Editable	Values	Format
Reason	The closure	Y	String	Υ	Display the workshop name within the	N/A
[NEW]	reason.				corresponding calendar days.	
From	The closure	Υ	Date/Time	Υ	Allow the user to select a date value.	MM/DD/YYYY
[NEW]	start date.					
То	The closure end	Υ	Date/Time	Y	Allow the user to select a date value.	MM/DD/YYYY
[NEW]	date.					
Created/Updated	The date, time,	Υ	String	N	Display the date, time, and username of	MM/DD/YYYY
[NEW]	and username				the user who added or updated the	HH:MM
	of the user who				closure.	AM/PM
	added or					(USERNAME)
	updated the					
	closure.					

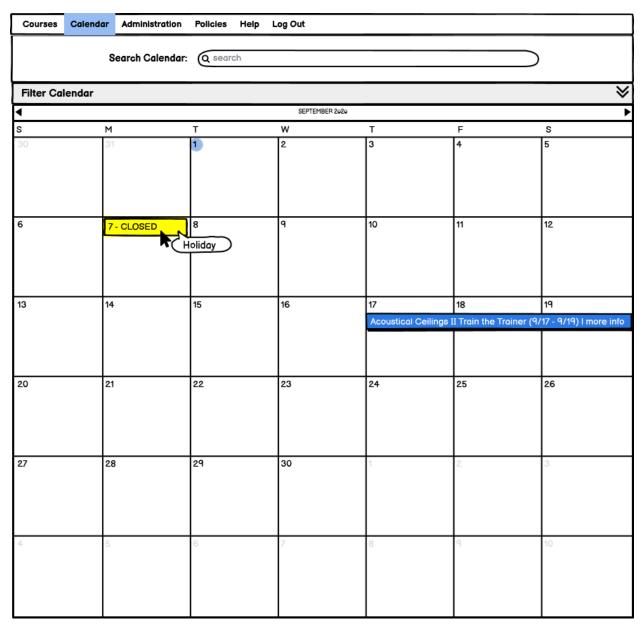
MU6: Training Center Closures

Location: Preferences >> Closures



MU7: Workshop Calendar - Training Center Closure

Location: Calendar

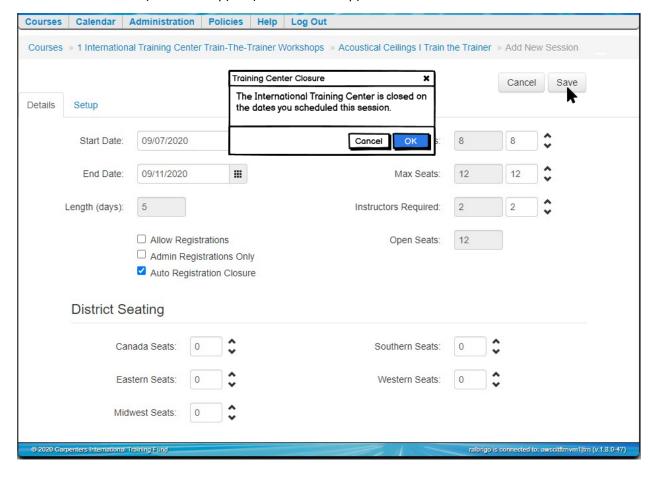


Add Session - Training Center Closure Warning

- CR6 Display a warning when a user attempts to schedule a workshop session during a training center closure.
- BR30 [NEW] The following warning message is displayed when a user attempts to schedule a workshop session during a training center closure: The International Training Center is closed on the dates you scheduled this session. [OK] [Cancel]
- **BR31** [NEW] The system does not prevent a user from scheduling a workshop session during a Training Center closure.

MU8: Training Center Closure Warning

Location: Courses >> (Select Group) >> (Select Workshop) >> Add Session



Workshop Calendar Report – Training Center Closures

CR7 Update the Workshop Calendar Report to include Training Center closures.

BR32 [NEW] Training Center Closures are only included in the workshop calendar report if the user has Administrator or Manager access.

DT5: Workshop Calendar Report

Location 1: Administration >> Reports >> Workshop Calendar

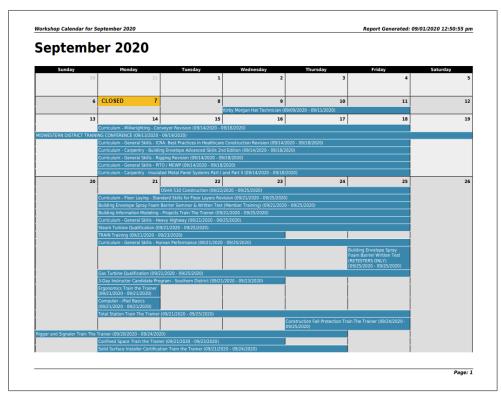
Location 2: Calendar >> Filter Calendar (section) >> Download PDF

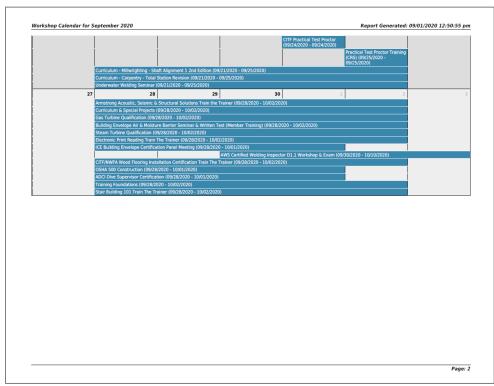
Data Field	Description	Required	Data Type	Editable	Values	Format
Month	The calendar	Υ	Date/Time	N	Display the calendar month.	[Month]
[EXISTING]	month.					
Year	The calendar	Υ	Integer	N	Display the calendar year.	YYYY
[EXISTING]	year.					
Workshop	The workshop	N	String	N	Display the workshop name within the	N/A
[EXISTING]	name.				corresponding calendar days.	
Session	The workshop	N	Date/Time	N	Display the session start date and end date.	(MM/DD/YYYY
[EXISTING]	session dates.		Bate, Time	.,	Display the session start date and the date.	-
[EXIOTITO]	session dates.					MM/DD/YYYY)
						, 22, ,
Canceled	Indicates the	N	String	N	Display "(canceled)" next to the workshop	(canceled)
[EXISTING]	workshop				name if the session has been canceled.	
	session was					
	canceled.					
Closed	Indicates the	N	String	N	Display "CLOSED" within the corresponding	CLOSED [##]
[NEW]	Training Center is				calendar days of a Training Center Closure.	
	closed.					
Report	The date and	Υ	Date/Time	N	Display the date and time the user	MM/DD/YYYY
Date/Time	time the report				generated the report.	
[EXISTING]	was generated.					HH:MM:SS
						AM/PM

MU9: Workshop Calendar Report - Training Center Closures

Location 1: Administration >> Reports >> Workshop Calendar

Location 2: Calendar >> Filter Calendar (section) >> Download PDF





Usage Report – Training Center Closures

CR8 Track the date, time, and action when users view, add, edit, or delete training center closures.

BR33 [NEW] The date, time, action taken, and username of the user is displayed in the Usage Report when a Training Center Closure is viewed, added, edited, or deleted.

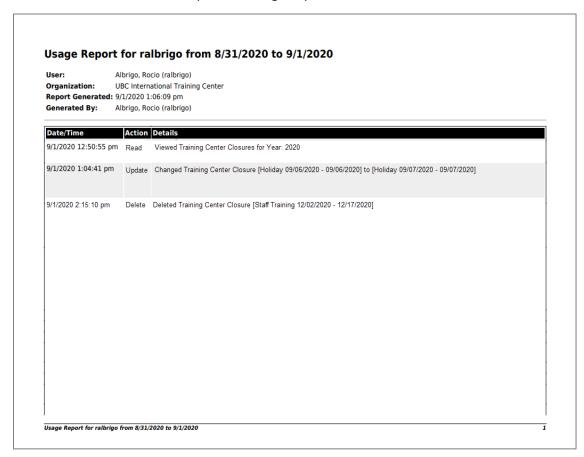
DT6: Usage Report Data

Location: Administration >> Reports >> Usage Report

Data Field	Description	Required	Data Type	Editable	Values	Format
Date/Time	The date and	Υ	Date/Time	N	Display the date and time the action	MM/DD/YYYY
[EXISTING]	time the action				occurred.	HH:MM:SS
	occurred.					AM/PM
Action	The type of	Υ	String	N	Display Read, Update, Delete, Log In, or Log	N/A
[EXISTING]	action taken.				Out.	
Details [EXISTING]	Detailed information of action taken.	Y	String	N	Display detailed information of the action taken by the user including screen name, field name, data changes from/to, data entries, etc.	N/A

MU10: Usage Report - Training Center Closures

Location: Administration >> Reports >> Usage Report



Revision History

Version #	Items Discussed	Meeting Date
1	The original document was discussed. The following changes were identified: Usage Report – Training Center Closures MU10 Corrected mock-up title. Workshop Calendar – Universal Search BR2 Added new existing business rule to show sessions are displayed through the maximum calendar date. Workshop Calendar Report – Add Workshops Filter CR4, BR19 - BR24, DT3, MU5 Added new change requirement to add a Workshops filter to the Workshop Calendar Report.	9/2/2020