ASSOCIATION OF UNIVERSITY CENTERS ON DISABILITIES (AUCD)
FY 2019 NIRS ROLL-OUT WEBINAR
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CART Captioning

>> All right. It's 4 o'clock. Let's get started. I'd like to thank everyone for joining us today for the NIRS fiscal year 2019 rollout webinar. Next I'm going to go over our agenda for today. We'll go over announcements, presenters, and then we'll move on to the demonstration of the NIRS revamp. Our announcements for today is NIRS officially opened today, August 6th, and later this week, we will have the user guide, data dictionary, paper forms, and other resources available later this week. We'll also have this webinar will be recorded and we will have a archived with the transcript for future viewing, and that will also be posted later this week.

Our presenters today are myself, Natalie Martinez, data support manager. Oksana Klimova, director of web services, and Dawn Rudolf, senior director of technical assistance and network engagement.

And now I'm moving on to Oksana, and she will give you a overview of the NIRS phases that's going on with the revamp.

>> Hello, everyone. A year ago, it became clear to me that our NIRS could not delay anymore with upgrades. I developed the corresponding proposal and present it had to AUCD board of directors, it was approved, and AUCD provided financial and most importantly, emotional support for this effort. Since this then, I managed this project and today I'm really excited to present to the network NIRS 2.0.

During the presentation, Natalie and I will refer to the previous old version NIRS as the NIRS 1.0, and newly upgraded version, NIRS 2.0. Somehow, in I say NIRS 2.0, I'm always thinking about 2,000, somehow we cannot fly NIRS 2.0 but maybe one day.

Our goal for this project was to upgrade NIRS application to improve appearance, user interference, and user experience. This very broad goal translated into the concrete list of functionalities and enhancements. And I will give you 10,000 feet view on what's new in NIRS 2.0 and Natalie will cover those in details in her demo.

First, I will start with new functionalities. Those functionalities did not exist in the NIRS 1.0. When you log in, in NIRS, you will end up in this center dashboard landing page. That page houses three new features. First, it will be visualization of financial information of the center, and this feature have restricted access based on security level. Second will be resource library. This is the center-specific list of resources and will be available to all NIRS users. And the last one, my notes, this is user specific list of your to do tasks.

Trainee data set will include quick e-mail tool. This is e-mail functionality that can be used by director and data coordinators to communicate with current trainees, if e-mail will be provided.

In the NIRS 2.0, we separated standard and custom reports. Currently, custom reports is available as a stand alone tool in each data set.

And now, I mention enhancements to application, it's smaller improvements. We implemented the responsive layout. For those who not familiar with the term, this is an approach to web design that makes web pages run well on different devices and different size browser windows. In practical life, what this means, you will be able to work on NIRS on the phone, on the template, on the desktop. We implemented horizontal menu, anchored. So when you scroll the page, the horizontal main menu will stay at the top of the page, and this give you flexibility to jump between the section of the NIRS.

Our new code compliant with ColdFusion 2016. ColdFusion is a platform is an application, while planning server up in September, so the code was most recent ColdFusion 2016.

Code is written in HTML5, and because that HTML5 allowed implement interactive feature in the NIRS. For example, you will see glowing button, extended and collapse list, so HTML provide full support for java script run in the background and activate those features. We implemented unique color for each data set. For all data set, there are group of features that you will see on the data set list page. Use of new management tool, it will be displayed is a three-dot icon. Submenu will be displayed in the two-column format. Paging module will be available for you if you are looking for specific item, you can jump between the pages. Option to selected number of records per page, including option all. Now you will be able to search data set over multiple years directly from the data set list page. We devised a list of columns display item information in each data set. And not the last but very important task was application was tested in web AIM access built tool and we passed the test.

NIRS 2.0 was a big project and we did not work on it alone. The support network group was put together in September. The group provided suggestion for layout improvement, they proposed functionality that would enhance user experience, in efficiency and retrieving and using NIRS data. Team spent significant amount of time reviewing and offering feedback on proposed by and wide frames of selected papers. Their thoughtful approach to the project helped allow us to make judgment from NIRS 2.0 to the NIRS -- from 1.0 to NIRS 2.0. This is the list of team who I call team, and big thank you to you all. We could not do that without you.

What's our plan for 2019? This year 2018 we call phase 1, and we revamp 90% of the code. As you know, the new application is vast and has a vast functionalities. So there is still 10% that will be updated in 2019. Those 10% include PPR report, trainee survey, and dissemination tool in the product data set. I should mention that those modules are functioning properly. What we will updating just visual elements of those tools.

Plan platen for 2019, we're planning to get back to the list of suggestions created by support team. Support team provided extensive feedback on the current NIRS application, and we will go back and review list of suggested functionalities and will identify the items for future implementation. One of examples is, for example, saving reports not only in PDF format but Excel format also.

I would like to bring to your attention Link NIRS 2.0 feedback during Natalie's demo of the NIRS pages. That link will be allocated in the area. Link will take you to the survey and will use survey to collect feedback on the box, new I ideas, new suggestions, and new proposals. All information will be clerked, reviewed, prioritized, and combined with existing data coordinated wish list, and it will be included as a standing item during data coordinated quarterly meeting.

That's all my part of introduction of NIRS 2.0, and now, Natalie will take over to work you through NIRS 2.0 pages. Natalie.

>> Yep. Thank you, Oksana. So now we're going to move on to the demo. So this is the NIRS, I don't know how this blue stripe got on here. This is

>> Well, then I don't see if it is on the other monitor. You can start sharing a different monitor is. It that blue line?

>> Is this better?

>> Mm-hmm.

>> Okay. We'll move it from here.

>> Sorry about that, everyone. So this is the log-in page for the NIRS revamp. The location is still the same, if you go to the AUCD website and go to NIRS log in, you click on it and it will take you to this log-in page. So I'm going to enter my log-in credentials. And we'll do this on our test site. So this is -- this is the dashboard, and the dashboard depends upon what you can see, so depending on your user role and permission, it will allow you then to view, you know, it could be leveraged funds, it is can show you what kinds of

project etc. or activities you had. But this is all based on user rolls and permissions.

Wand now what I would like to move on to is our first data set which is the trainee data set. So as you can see, it is kind of divided in to two sections now. So we have managed data set and new view data. So what I'm going to move on to is the add trainees. So here is where you can add your long and medium term trainees, functionality is the same, and I'll just scroll through. And then I'll take you to the short term trainee. And this is where we will add the short term. Remember anything with an asterisk is a required field and must be filled out.

And over here we'll go to manage. So manage is where you can edit or delete or view the record. So here it will show us the main record, so if we look at Mara T, new addition, we have her main record and then it will show her annual records which are from 2018 and 2019. To manage the main record is over here so we'll click on these three dots. And here we can edit or view the main record, so we'll just click on edit to take a look. And I do want to point out that we have two new features this year in the trainee data set. So if we look at the trainee data set and we view, let's see, academic level, oh, that's actually on the annual record. Sorry about that. Let me go to the annual and I'll show you those changes.

So here is where you can manage your annual record. If you click on these three and you click on edit, so over here, academic level, this is new for fiscal year 2019. So there's a other option, and if you click on other, you must enter a description down below. And there's also another change to this MCH funding. So if you scroll down here does LEND trainee have MCH support, if it's a yes, you know, yes or no, and then if you scroll down here, the support is different. So you'll enter the total amount of support that the trainee is receiving and then down here you'll have support type. And this is where the change is. So everything is kind of combined in to one. And if you have other, then you can type down here what the other funding is. So let's go back to manage real quick. So, again, the manage the main record is over here. You can he edit or view. And then manual record which you can add view and delete the record. And then we'll go to short term trainees. Again, this is where you manage the record, edit, view or delete, and we can click on view. And then down here is the new feature, the e-mail template manager. If you click on this, you can modify the template, so how, whatever you would like to send a personalized message to the train y so this is for the introduction, this is for the footer, and your signature. And up here you add the subject and to whom the e-mail is from. And it will also show you a view delivery report. So this gives you a report of what e-mails were sent. We'll move out of this.

And now we'll go over to view data. So here are the standard reports. The same as before, functionality is the same. And then is here is our custom reports. So here's where the categories are, however they are categorized, the reports. And then up here is where you're going to click to create your custom report. You'll enter your information. And then I do want to show you the advanced search for the trainee data set. So you can search by fiscal year, trainee type, the discipline, you know, the trainee's first name, last name, just like before, functionality is the same, and then we'll go over here to the list survey. In our, nothing is going to show up because we don't have any examples in the system, but this is where you'll go then to view which trainees have completed their follow-up surveys for the fiscal year. Okay. Now I'm going to move on to the products data set. So here we're going to show how to add a product. And we have all the definitions for each product. You can add it here. And it will also show you the total type of items. So as you can see for conference presentations and posters, we have 64 items that have been allocated to that specific product. And if you click on it, it will take you to those 64. And we'll go back. And then to add, you click on the add button. And enter the information. Again, functionality is the same from NIRS 1.0. Now we'll go to manage products. And manage it shows you the name of the product, the type of product, when it was added, and the date it was last edited. And if we click on the three dots for manage, it shows us edit, view, and delete. So we could edit the product, or we can view it.

Next, we'll go to product dissemination. The same as before, functionality is the same, in here we can go to review. And now we're going to move on to the view data section which is the standard reports and custom reports. So I'll click on standard. Again, it's the same as NIRS 1.0. And then we'll move over to custom reports. And here, it shows you the categories if they've already been created. And then we'll go to add custom report. Functionality is the same. And then we'll go to advanced search. So here you can search by fiscal year by key words. We can search by, you know, the product author, anything like that. Up here you can also select the years. So if he we want to look at, say, 2018., it shows us all of the products for 2018. Okay. So now we are going to move on to the data activities data set. So here's the activities data set. Again, it's been split up in to two sections, manage data set and view data. So here we have add activities and they're split up by their core functions with the definitions. And it shows you the total count for each core function. So we'll just click on continuing add community training, and you can see we have two activities for this fiscal year. And to add, we just click on the add button. And this is what it looks like, again, functionality is the same.

Okay. And now we'll move to manage activities. Again, it has the title, the core function, the date it was added, and the date it was last edited, if we click on the three dots, that will manage the record and we can edit, view, or delete the record. So I'll just click on edit. And here's where we can edit the assessment. Or we can view. We do have this saved as new function so that is our copy function in NIRS. So if you need to make a duplicate record, you know, to copy it from the next fiscal year, you can do that as well. We'll go to the advanced search. You can certainly by fiscal year, key words, you know, program type, fiscal year, you can even search up here by fiscal year if you want to. Then we'll move over tow view data portion which is the standard and custom reports. Standard the reports, all the same reports from NIRS 1.0 and then we'll go to custom reports. Again, here's any categories that may have already exhibited from other reports.

What you can also do is click on what kind of, how you would like the results to be presented. So if we do download comma and click on manage and run report, it will then run the report for us. So it will show a little box that tells us how many records have been found and processed, and then it will pull up the file for us as well. And then we'll go up to add new custom report. Again, it's the same functionality, the same.

Okay. Now we are going to move on to projects. This is the projects data set. Again, it has been split up in to two different portions, the manage data set and view data. So we'll go to add project. And this is the same as before. You know, if you need to enter any funding for federal, state, and then we'll move on to manage projects. Here's where we can view all the projects from the fiscal year, so title, type of activity to code when, it was added, and the date it was last edited.

Then manage, we can just click on this. And then we can edit, view, or delete the record. We'll just click on view. Again, you can also save as new to copy it over from fiscal year to fiscal year. And what we can also do is we can search by fiscal year here, and you can certainly by multiple fiscal years. And these are all from fiscal year 2018, and you can also do the advanced search as well. So by fiscal year by key words and then we'll move over to the view data, the standard reports and custom reports. The standard reports are the same, from NIRS 1.0. And then we'll move to custom. Here, again, we can do this. We'll just run a report real quick, and it is saying 143 records were found and processed. And then there's our CSD file down here. And then we'll go up here to add our custom report. And then here's the information is all the same. Okay. Next we're going to go over to goals. So goals is just like the previous data set. It has been divided up in to manage data set and view data set. So we'll go to add goal. Again, functionality is the same from NIRS 1.0. And then we can manage our goals. And we can do this right here. We can he edit, view, or delete. Let's just click on view. Again, you can copy with the save as new. Let's go back up there. We can search by fiscal year right here. Let's see what we get for 2018. These are the goals for 2018. If we click on the blue link, that will take us to the record. And then we'll click on the advanced search. And then moving on to the view data. So we have the standard reports and custom reports. We'll click on standard. Again, this is the same as NIRS 1.0. And then we'll move on to the custom reports. I don't know if we have -- oh, we do have an example here. So we'll just click on this example, and then we'll run it.

85 records. So that's how you run a custom report. And then if we want to add a new report, we'll click on that button and then here. And then we're going to move on to the directory. So directory, has, again, been divide it had in to two sets, the managed data set and the view data. So if we click on managed center information. So here's where you can manage your center info, with you know, the contact information, the website, Twitter Facebook, address, phone numbers, fax, this is where you can add all of this. You can add a new staff profile from here. Or you can add it up here as well. This will also show you what staff need approval to have their profile show up on the NIRS page. And then down here is where you can also manage the staff profile, so you can do a quick search down here for any users that you're looking for, or you can just view all of them. If you click on this, it will show you all 27 staff. And up here, it is showing only ten entries, but if you click on this, you can do 25. Or if you want, you can do all of them, which is the full 27. So for directory, to add faculty staff profile, this is where you'll enter their information, the username and password and where they work, what type of leadership,

primary activity coordinators, discipline coordinators, contacts, primary discipline, any other disciplines, and then this is where you can enter more of their information.

And then we'll go to manage faculty staff profiles. And here, you can edit, view linked products, and projects or view. We can see their status, if they're active, display, not display, pending submission, waiting, ejected. If we want to include them in EHB upload, and the last time the record was updated. So we can just click edit to edit the record. Or we can go back and we can view linked products and projects. I do want to go back really quickly to manage center information. So here you can see that we have one new staff application waiting for approval. So we'll click on this staffer's name. You know, you look it over, and then you can approve it. And then it says waiting for approval, and I will click display and save record. And now we're going to move ton to view data. So this is the directly dashboard. Again, that's kind of like what the first page that we saw. So any new staff that need -- that are penning that need to be approved, you have manage information and staff profiles. And in here we have our standard reports. And then our custom reports. So we can see if we have any previous reports. So we'll just click on one. No. Zero records. But you get the point. And then you can add the new report. Again, is the same functionality as NIRS 1.0. And then here we can search the directory as well. So let's see if we can find someone. You can search by first name, last name, e-mail or status. So here's someone with the name that has test included. Or we could also search by status. So let's see. Like do not display. So that is a directory data set. And next we're moving on to admin. So admin, again, has definite divided in to two stages, the manage user records and manage data. So we're going to click on manage activity staff. And here you'll see their names. You can edit or delete, the date it was added and who added this record. You can also add new activity staff with this blue button right here. You can click on that. And then you just enter their name. And then here you can edit, you can edit their name.

Now we'll go on to manage NIRS user log-in. Here we have their name, e-mail, log in, password, access level, which data sets they have access to, are they a directory manager and the last day of their log-in. So I'll just click on Corina, and we'll click on manage and here you can edit or delete the profile. We'll click on edit. In here is where you can make changes. So if you don't want them to have access to the directory and you don't want them to ask have access to like the module or something like that, this is where user profile. So we'll just save that. It also has their access level too. You want to change that as well. So ail maybe I'll change her to read write. And we'll save. So we look at Corina, she only has read write access and she only has access to the trainees, projects, activity, and product data sits and they is no longer a directory manager. And now and now we're moving over to ownership transfer. So ownership transfer is when you have staff with read write own permissions and you want to move record access from one staff person to another. And this is wrung do it. So you just click on a log-in. And you'd move all of their records to another user within their center. Around now we're going to move on to manage data. This is where you will create, enter, and submit your PPRs. Functionality is the same. It has not changed from previous years. Let's see if I can view. It might let me. Yep. So, again, it looks the same. And it will show when it was last edited, when it was submitted, and any admin links. And then we'll move on to reports. Again, these are the same reports from NIRS 1.0. And then here's the import function if you need to import any data in to the firsts system. We'll just go here. You'll select the data set that you want to import to. And then you choose the file and then you click import. We also have the export. So you're able to export data from fiscal years. And you can ask -- or you can kernel when you want the data from, if you want it from a fiscal year or you want it from a date range. And then here's the manage user define field. So these are the miss fields that you can create in NIRS, you know, they're like your custom field for each center. So this is where you can do it. You can manage them. You can edit. This is for activities, has it for products, project and surveys, so this is where you can go to add your custom data field. Here is for cares evaluation. These are all of the LEND programs. And this is where you can edit and view. And then down here is where you are resource library. And these are unique, then, to each center and what resources they have. And then up here I wanted to show you where this little person icon is located, that's your profile. So here's where you can update your profile and change your passport if needed. If you click on this, take you to your pro pile, you can edit your NIRS account, you can look at your records, and see what's associated with your user name. You can view. You can edit your NIRS account. And then over here is where you can change your password. Okay. I think that's the whole kit and caboodle. Oksana, Dawn, did you want to add anything? Oksana, did I miss anything?

>> I think we covered all sets, and you done did it well, Natalie. Let's see, let's jump into the questions.

>> The chat box looks pretty full.

>> And I'm happy to read the questions off in the chat box for you, Natalie.

>> Okay.

>> Keeping an eye on them. The most popular question is, do custom reports and other data entered previously, have they all transferred in to NIRS 2.0?

>> Yes. Yes.

>> We have reassured them in the hot box also. The question kept coming in so I know folks are nervous about that.
>> Yes, which I understand, but everything, all the data, historical, it is all still there, it just looks different.
>> Okay. Great. Thank you. There's a question in the trainee record.
>> Okay.
>> And I don't remember if it is a year record or the annual, but -- the year record or the main record, you'll probably know. The academic level field you that mentioned that now there's like an other option.
>> Yes.
>> Right? The question is, is that -- do they fill that in with their current level of academic level or is -- well the question is, the current level or the highest degree achieved so I guess that's the highest degree achieved for what they're studying for?
>> I would believe so.
>> It's a or question. Can we take a look at the record?

>> Yes. So where you would find this is under the manage the annual record, it wouldn't be under the main record, so let's go to the annual record for Mara. Let's click edit. So here's the academic level.

>> Yep.

>> The manage, other. So this was the change right here for other. So you would have to enter a description for it.

>> And I saw a little red pop-up as you clicked in there and it talked -- and that's the one that gave the answer, it is current enrollment status. Not the highest degree earned? So this is -- this is the degree that they're that they're pursuing right now. Is that correct?

>> Yes. Nice box, Oksana. I like that.

>> Yes. We --

>> All right. Let me go back to the questions and see, I'll get past all of the customer questions. There was a lot of those. So there was a question about the, still in the trainees.

>> Okay.

>> For type of support, you know, how the change was --

>> Yes.

>> Support type. If amounts -- well, the question is, for the train -- support type other, is that where you can add travel funds? So for support time, there's a stipend, stipend plus tuition, and then there's other?
>> Correct.
>> So what I see as a little weird here, and I know this was, if people have multiple different kinds of supports, like there's a stipend, there's a stipend, and tuition, and travel funds, they canter that but they can still enter one of these options? Is that case?
>> That's correct. That requirement came from MCHB. In this year, they have the system and I assume all grantee will go through the training and I'm not sure when it but you all will go through the training on the new system, and the options available in the new system is there, single select, for fiscal support from MCHB. MCHB do not allow combination of different type of support. And before we you know, work on the NIRS we confirmed this with MCHB. So I -- I'm -- my answer will be select other and type in the description field type of support that goes to the trainee. If it's more than -- if you could not differentiate

between stipend, stipend tuition, or tuition, go with other and explain in the description notes, and I should warn you description notes symbols except on the 100 symbols, unfortunately, it again, this is requirement from MCHB database structure because that information got exported from NIRS and it brought it in to MCHB database.

>> Thanks. So there's a question that probably applies to multiple data sets because the functionality is the same in the search across multiple data sets. And the question is, is there an option on the search menu to select all years? And Oksana did answer in the chat box that yes, that option is the in the advanced search, so if you go to the advanced search.

>> So I'm on the trainee's data set, heading over to the advanced search. We'll just get out of that. And then we can search by all years.

>> There you go.

>> There was a question about goals, the goals data set, which is a rare question because the goals data set is never used. Are o not, I shouldn't say never, because some folks probably do use it or else we wouldn't maintain it. But it isn't by the funders, so it doesn't feed in to annual reporting

by any of the programs supported through NIRS. But there is a question, is it assumed that all projects will have a goal and vice versa and that all activities will correspond to a goal and project is in fact and Oksana did answer also in the chat box

>> And I can explain it. That question, a couple of years ago, that type of question come up during our annual data coordinators meeting because the center was still interested in the tracking activities and project, align tracking activities and goals and I come out with solution with which I suggested, and I'm not sure it was implemented or not, you can use user defined fields for activities and projects data set. You can set up a list as all of your goals as a user defined field. For activities and for projects. And based on that you can create custom searches, you can report number of activities line up with selected goal, with, yeah, selected goal from the user defined field. So you can walk actually a little bit around by user defined fields.

>> And this may be helpful, if anyone uses NIRS to keep tracks of goals and progress on other leveraged activities that are not being reported so

you, say you a Department of Ed grant or something that you need to report on goals. If it is helpful to use NIRS that way, you can.

All right. Let me run down to the next question. Can the date of the dashboard be changed to see other years?

>> Not in this phase, the data board display data only for the current fiscal year. So the data, the dashboard, sorry, is a snapshot of where you center in the collection of the data. So first report numbers on different data set. Second drew financial data. As I said, that is by security level. And resource level in my notes, that information probably will be from year to year. I didn't decide it yet but for this year, because it is brand new development feature, those will be for the current year.

>> Fabulous. Thanks. Okay. This question is the ownership transfer. I think that was an admin.

>> Yes.

>> So the question was you cannot select specific records of one account to move to another. Is that correct? It's like a all or nothing?

>> Yes. Yes. So if you transfer ownership, you do that everything that were created by one user

transferred to another user. You could not do that item by item, for example, pick up one product and say this is was created by Natalie but just for this product I want to change ownership to Oksana. So unfortunately it's kind of all or nothing.

>> Okay.

>> And can I follow it on, I mean, it was suggestion from the center they said that it would be helpful to us, actually I enkeerj you all to use that link, NIRS 2.0 feedback, Natalie, can you please point it out, and click this at the bottom.

>> Oh, right here.

>> Yes. It's on every NIRS page. So if you have any troubles, you don't need to do much, I can click short survey, it's three questions, it is who you are, in terms of user, proposal or suggestion you want to put on the survey and the text area where you can type. So please use it. If you need that feature, associate owners the Ott single item, please complete this survey and we will -- we promise well-read those and we will respond to those.

>> There's a question about the resource library that was on the dashboard page. Who is that resource library viewable by?

>> Everyone. The data coordinator was admin access. Natalie, can you please help me. Under the management, that will take you to a list of all the available resources and that list will be created by AUCD, what I mean by Natalie and me. So you will go through the list and you will select the resources that is most relevant or most, you know, that users will need it for your center. So you will select the resources by clicking check boxes and select display order, whatever most important for you center, and I'm stressing your because it is center specific list, most important to the top, you save select resources, and resources, list of resources will be displayed on the dashboard page. All users are all level of security levels from read only to admin will see that list.
>> Thank you. And that's where we'll be adding in like the users guide, the data dictionary, the paper forms and all of that that we're just finishing up.
>> Exactly.
>> With the new iteration.
>> Exactly. That idea was people need some references and we are helping them to find it by

jumping quickly from NIRS to AUCD web page.
I'm -- relevant web page, don't make them go and search for this. And that can demonstrate, if you go to dashboards, new resources, on-line learning module I posted as a test, so you can just see how things are working.
>> Yeah, one moment.
>> Yeah.
>> And you know as Natalie is jumping through this, every time she select the center, this is only visible to the central office people, me and Natalie don't -- center will not have this transition page. So Natalie, if you click on one learning module, you can read on description and it will take you right to the page.
>> Fantastic.
>> Nice.
>> Okay. Thank you. So I've got another bunch of questions, they're still rolling in so that's great. Somebody is wondering if we can start entering data for the current year now.
>> Yes. Some I know the Alabama started entering their trainees and sent me Natalie and it was always during the day and so you are welcome to start putting data in.

>> Way to go PPCs. There's a question about whether we still need to copy and save our project database forward. I'm wondering if that's the save as new feature to take your old project record in to the new one?

>> Sounds like it.

>> Yes.

>> And we didn't change that feature, so if it was there, you can just save as and carry this in the new year.

>> Yes.

>> And I just I just want to clarify for everyone, there are a -- because there are a lot of phone on the phone, that's why we're not unmuting folks, but if I'm not reading your question clear or the answer isn't clear, just a note in the chat box to unmute you so I know who to unmute and we can talk through it, just in case we're not understanding a question or getting a answer across clearly.

Okay. Let me go back up to where I was. Okay. What is the difference between the annual versus the main record for trainees?

>> Natalie.

>> Yes.

>> Do you want --

>> Do you want me to go ahead or --
>> That's okay. Jump in.
>> Okay. So the main record is the first record that you create for them. So that includes all of their demographic information, their address, who their permanent -- or not permanent but whose another, like, form of contact, like, you know, mom or dad or something, some way you can contact them in the future to get them to do their follow-up surveys. So the main record you only create once and that's it. And then your annual records are what you create every year. So if there's a change, you know, if they go from long-term to medium or, you know, something like that. So but the annual record needs to be done every year.
>> Thanks.
>> Okay. That's another question about the project data set and the project state Day that set, can we pro rate the amount of project based on the starting and ending dates? Also, for continuing projects, can you automatically add to the total based on the current year amount and where are you in the budget year? Let's take a look at a project record.
>> Okay. Let's go to manage.

>> So I don't see that question. So can you repeat it again? Sorry --

>> No, no, no, if you scroll through the chat box, it is at 4:43 p.m. This is how far back we are in the questions. You guys got great questions. Can we pro rate the amount of the project based on starting and ending dates? So I think the answer for this is actually in the data dictionary. I remember looking up the answers for this pretty regularly. The total funding row right here, there's a total funding and then there's a current FY funding. There is a difference between the two. Your total funding is for the full recognize of the project. I would have to look at the data dictionary for that because I don't recall the answer for that. Natalie, you probably remember better than I do, though.

I'll look up the data dictionary. I'm pretty sure you that put the total funding in and then you put your annual current FY funding. The thing that's confusing me is where it says automatically calculated. I'm thinking that must be automatically calculated in the leveraged fund report, I don't think it's automatically calculated here in this record. That's the piece that I was confused by, where it's automatically calculated. I think it is the leverage funds report. So TMU, we're going to have to look that one up and make sure we get that correct answer. Because I don't know it off the top of my head.

I'm not sure who I know who TMU is, though, so if you want to send me like a little live at chat to let me know, that would be awesome. Or maybe we'll find the answer by the end. Is it okay if I go on to the next question and just keep this one in mind?

>> Yeah.

>> Okay. Okay. Somebody asked what is the average response rate for the long-term trainee surveys? That's an interesting question. It varies, center by center, I don't know that we've done an average rate of response. We could do be a average rate of response, I'm sure we have the data in NIRS to pull that out.

>> Yeah. That's a good question.

>> Mm-hmm.

>> Okay. There's a question, can you please give us the log-in info to access the test database so we can play with it before entering our real data?

>> Yes. We sure can. We'll provide that later this week where they'll have access to the I guess the testing site and log-in credentials, and he'll provide that to everyone so they can go in and there and play around and just, you know, get used to the new format.

>> There's a question about the color, the color and the background of the pages, the gray font on a white background could be hard on the eyes. Is it possible to make the fields more defined?

>> There is no -- we can look at the color us because as I said, nothing is set? Stone. We can look at your suggestions. -- when I developed the color scream, I did realize that gray is kind of comer that popular, but needs to be used with care. That's why when you click on the record, it is actually highlighted in bright blue so you can see where you are and what you're looking at. But definitely we can do more work and line up, if we will hear a response that colors should be stronger or, for example, something not clearly visible on the page, definitely. I mean, we can adjust the colors. The answer will be yes, we can, if there is a automatic tools to do that, there is not.

So -- the process will be if we establish new color, we will run it by data coordinators group, and based on the feedback, we will implement the changes.

>> I wonder if you hit control plus on your keyboard, does it make it easier to read in the meantime? It's that responsive design. See, I almost don't need my glasses now.

Okay. There's a in between all the questions there are peppered in some comments about how wonderful this is. So thank you to everyone.

>> Thank you so much for that feature.

>> I see the question for the import feature. I'm going to hold on to that question. Sorry, I held on to it the first time without mentioning it. But I'll just hold to that one for last. There's a question about the automatically calculated to the total funding of the project. Okay. So that goes back to the question about whether the in the project field, in the project form, I'm sorry, the funding fields. You can zero out the field says turn FY funding where it says automatically calculated that has to be entered each year. Is that correct?

>> Yeah.

>> So can you click on it and like delete it?
>> This one right here, the one with like the 70,000? Yep.
>> No, it's automatically calculated because if you click on the federal, it's -- I mean, in our case, it -- it is state and local.
>> This is a good clarification.
>> Yes. So to change that number you actually to go actual list of agencies that financed that you selected and change number here. You can just click out. If you go back to main navigation, there is anchored link there, so that will automatically --
>> Yeah.
>> So it automatically calculates -- it takes the link of the project and automatically calculates to that?
>> Yes.
>> I apologize for being incorrect earlier, and thank you for the clarifying question, whoever you are, TMU. Or Tom Muno, there it is. Tom. Hi. Now I see it in the chat box.
>> And I think we skipped one question from Laura, do you create any a new annual record every year.
>> Sorry. Good catch.

>> Yeah.

>> Can you read it?

>> I haven't found it yet.

>> Oh, okay.

>> It's 4:57. Oh, it says -- okay. It says privately, I think she sent it to me. Okay. I will read the question, maybe it will be helpful to everyone. Do you create the annual trainee record every year for every trainee or just those who have changes.

>> It is --

>> Yeah, this is for every year. And different centers do it differently. Some just add annual record and some do every year they do annual record and just add annual record for this specific current year. So it is whatever center style is, I would say.

>> Back to the main chat, thank you Tamara for answering the question about calculating the fiscal year funding. You data coordinators are a fantastic group to learn from. Thanks for sharing your knowledge. It is right at the top of your head. It is brilliant. Another shot out for awesome, clean design. There's a question. Will we be able to use the new e-mail feature to send

out merged long-term trainee follow-up surveys so that their ID number is merged in to the letters? Brilliant. That gets a Hershey kiss.

>> If is you --

>> You create a template, every center creates a template, right?

>> Right.

>> But that's not identifiable. Figure that out.

>> No. Natalie if you can jump back to the trainees.

>> Mm-hmm.

>> Actually to the trainee manages page for the current trainee, for the --

>> Okay. Which I call current. So the two is working for current trainee, long and medium trainee, as long as they provided their e-mail address. E-mail address is not required field. So if you want to communicate with them, provide e-mail address. If -- survey, if it is current trainee, you can select chat boxes, for example, Natalie, select couple.

>> Okay.

>> Or select all, if you click link select all at the top of the right column, and where the select templates, you can select templates and yeah select

first one is because I set it up, you can click preview, and if you hit it what you see, you can close it and e-mail it.

>> And then up here it shows.

>> Right. So the answer is no to the question. Its not going to be sending out merge long-term trainee follow-up survey so that their ID numbers merge in to the letters. It's not going to do that.

>> Because it's a template, is that right, and the IDs are advise lied?

>> Bus because it's a template and you can select only from the current trainee that enroll in this current fiscal year. If you trying to get in touch with former trainee, that completed program several years ago, you will not be able to.

>> Okay.

>> All right. Thanks.

>> And I would keep this -- yes, I would keep this question to the -- as feature for the NIRS for the future because I think it's based on the reaction, Dawn's reaction, it is --

>> It's a good question.

>> Yeah, yeah, it's a good question, yeah.

>> Keep track user IDs.

>> Yeah.

>> There's a question about the dashboard, on the funds leverage bit of the dashboard, the funds leverage tile has the exact amount we are receiving for the UCEDD, but in brackets it indicates without the UCEDD core, so it is not clear what that means.

>> Dawn, do you want to?

>> I can. So the funds leverage, right there 2 it says federal funds and the next, in the middle box, it says federal funds, in the box opt left it says federal, state, local and other. Without the UCEDD core means that the UCEDD core grant amount is not included in -- in the dashboard report here or even in the project report that talks about leveraged funds. It does not include the UCEDD core. We made that decision really clearly a few years back, the UCEDD core amount sometimes changes every year, but the word leveraged means that you've taken your core and you've used the resource that is you got from that core amount in order to write new grants, get new contracts, you're leveraging that core amount, so almost by definition of leveraged, leveraged does not include that core amount. So we, in the reports, in the project data set that informs from view right here from the dashboard, it

automatically subtracts the UCEDD core grant amount. Now, mind you, I will say, as a caveat, right now, since the NIRS database for FY '19 has only just opened, we haven't yet updated that core amount. So when you look at this funds leveraged report on your dashboard or in the projects database or data set, it won't yet be correct. By the end of the week, this will be one of the things that's correct just because now we've got the new year opened we are just fixing up the last little piece of this so that part will be accurate. Okay. So there's another quo I'm go to interest from stray is I, and I think it's more of a answer. She suggests setting up an Excel spreadsheet, setting up for a mail merge so that you can connect the user IDs to the trainees.

>> Mm-hmm.

>> And e-mail them.

>> I will definitely look into this, this year.

>> There's nor question from Amelia who doesn't quite understand the resource library. Can you add NIRS resource specific to our UCEDD for our staff or does it only link to the resource page or things that are on the AUCD website?

>> Yeah, and it mentions those links don't seem to take to you that. Apology for that, it was only for testing purposes so we didn't try to create actual resources but more like prove the concept. The answer will be for this year, in this other than AUCD stuff we'll be able to add list of resources that you can pull from. So the list that Natalie show us previously, they are on the admin tab resource library can be created by AUCD stuff only. But you as a data coordinator can pull in resources to your website if you want to have something specific, we can add it by your request tot resource library. In the phase 2, I was actually thinking about continuing this feature and let centers to add their own resources. But for this year it was too big and complex to add on the top of the revamp project. So we kind of did small step for step with the idea in phase 2 it will be expanded.

>> Thank you. Okay. I don't see any other questions. They may pump in. So I'm going to jump back to the import question. Roll back up and find it. So can we please go in to the import feature again?

>> Yeah. So here is the import section of NIRS. So what you do is you choose the table or the data set that you want to import the data to. And then you choose your file and import. Down here it gives you descriptions on, you know, what kind of what kind of files you should use, what it should look like, and then instructions down here.

>> Yes.

>> And how many centers use the import feature?

>> Some. Through this summer I know two was asking for help because they have issues with import. To be honest with everyone, import is not -- it will work. And it is working. But when you import your data, it doesn't insert all fields in to your records. For example, last time I update import functionality, probably three years or four years ago, within four years we added several new fields that are not included in import Excel spreadsheets. So I would advise be very careful and do not assume that if you will import record it will be perfect in your data set. You will still need to go back and review your data. We know that it's complex functionality and, as I said, I'm very careful to advising using it until we're not going to revamp if. Just carefully update all templates with most

recent fields. I want everybody to be aware that when import it, you need to review your data, be sure that all required fields are provided in your data sets.

>> All right. Thanks for the overview. A couple of other questions have come in. One of them came just to me but I'll read it to everybody because I'm sure it is of interest to everybody. Folks wanted to know when the data coordinators meeting will be at the conference because there was a survey about that, but the outcome by a very slim margin was to keep it on Sunday Dinner as it has been in previous years. But it was a very slim margin. So that tells us a that we should continue to ask you once in awhile when you want that meeting.

>> There's also a question here someone that is going in to the admin section, their performance reports, the past PPRs don't seem to show up. Will they be available at a later date?

>> And they should.

>> Because they should be there right now.

>> Yeah. So let's take a peek at that.

>> Yeah. And if somebody -- I'm not -- right. So they should show up for the previous years. If

not, can you please follow-up just send me ail to me with the center and I will respond.
>> Okay.
>> And we can double check the centers. We can click through the centers, I can have, summer interns, I can have one of them do it tomorrow, check all the centers. All the UCEDDs anyway.

Okay. There is there is a question about -- oh, another question about the import feature. Is this the same issue when problems occur when cutting and pasting in to PPR? That cutting and pasting into the PPR problem is I think a special characters problem.
>> Yeah, special character, right.
>> Wasn't that fixed though?
>> I was --
>> I thousand --
>> We work on this and it was fixed and I assume we're orange working on the cover to everything was working but this year we again got reports that people got the errors when they enter special characterize.
>> Okay.
>> We look in to that

>> Okay. And I don't see any more questions in the chat box. I think we got through everyone, and if I missed one, I apologize. There were no more that I was purposefully holding out on. So if I missed it, please resend it, otherwise I think we're good. And I want to give a huge shout out to Natalie, because here she is, not even in her first year in the job, and she's on top of things in NIRS, and got through all the testing for a whole new revamp of NIRS, as she was still learning NIRS and as she was supporting all the programs in their annual reporting.

>> Thank you, thank you.

>> We'll keep you around for awhile, Natalie.

>> Yeah, thanks.

[Laughter]

>> So thank you for all your work on this. It was no easy task.

>> Thanks.

>> Thank you.

>> All right.

>> Oh, and folks are thanking you also in the chat box. And I also see comments about previous records in previous -- from previous centers, we'll take a look at those.

>> We'll take a look at those, I will.

>> Got it. All right. Thank you, everyone. If you have questions, you can e-mail any of us, myself or Natalie or Oksana or give us a call. Or send a feedback question to the survey that is linked to the bottom of all of your NIRS pages, and we hope to see new November at the annual conference.

>> All right. Is that it? Is that all she wrote?

>> That's all she wrote.

>> Okay. Thanks, everyone.

>> Thank you, everyone.

>> All right.