Metro 4/SESARM
Southeastern Air Pollution Control Agencies

Draft Transition document

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Purpose

This document is an attempt to describe the many tasks that Metro 4/SESARM has to execute in its mission to support training and meeting events in Region 4.

A plethora of details are involved in this support and if any are missing confusion occurs and time is wasted along with the reputation of Metro 4/SESARM.

The confusion will be experienced both by Metro 4/SESARM, staff and management.

Introduction

The meaning of the term 'Training' can be attached in some loose interpretation to every meeting, workshop, webinar, conference call, classroom setup, and self-instructional course that Metro 4/SESARM gets involved in.

Every incident of a training event has specified components involved. They are the discovery of the need, organizational steps for event preparation, instructor selection protocols, communications methods between instructor and students including feedback, budget criteria, breakouts into secondary locations such as field visits and then the permanent record. These components vary in depth and complexity depending on the specified training method being experienced. An example would be that an email or conference call would have limited details in the various communication sub-components in comparison to a full face-to-face classroom setup or managers meeting.

NOTE: DEVICE means the Seagate Solid State Drive that contains all the Transition Planning Documents (including this one). On this drive the documents are found at the path >>Back Plus>Seagate>TransitionPlanning>SourceDocuments

Timings: This setup characteristic differs for each type of training.

Training type	Gathering	Setup timing
Annual training	Face-to-face	Annual cycle and try to understand the training need for each Fiscal year about 9 months before the year starts
Annual meetings	Face-to-face	Already understood to occur at regular intervals.
Face to face	Face-to-face	Already understood to occur at regular intervals (R4 LSASD monitoring and exhibition)
Adhoc training sessions	Face-to-face or remote learning	Requested by EPA, State, or Local (smoke schools, permitting, asbestos) or organized by Metro 4/SESARM.
Conference calls	remote learning	Monthly or quarterly such as AQS, Asbestos
Webinars	remote learning	In development

The following sections will discuss the components of each training type session. The training type governs the heaviness of each component involvement.

Training Components

Training Components regardless of type of training	
Section	Description
Discovery	How to discover training needs through emailed surveys, interviews, requests, research by programs and functions.
Event management (pre and post)	Finding locations, date scheduling, knowing instructor preferences, roster building, all logistical supports, etc.
Budgeting	Funding with the use of Federal grants and other sources (fees).
Communications	List of communication events between Student/instructor/MJO/local training coordinator
Instructor selection	(RFPs, interviews, acceptance by the hosting agency, partners, multi-hosts, meeting grant requirements)
Breakouts	Description of the need from just needing an extra room to organizing field trips
The Permanent Record	Retention policy, testing, reports, evaluations, final data calculations for use in future projections, data warehouse

Discovery is locating the training need. Annual surveys are issued, conversations with program managers (EPA and S/L) are conducted and interactions with managers on program conference calls.

A manual survey is conducted every year. This should be early in a Fiscal year as you collect information for the next Fiscal year. So, when FY 20xx starts, M4S sends surveys out during the first month (October) for the FY 20xx + 1 with a return date at the end of February. Reminders are sent out periodically to remind the training coordinators of the requested date of completion. This gives each coordinator time to gather the needed information, fill out the electronic survey and return it to us.

A copy of the electronic survey template is found in Appendix A and the actual electronic survey is found on the DEVICE. It is labeled: Survey for FY 20xx - Example.docx. This survey is built up on a catalog of courses that the ELMS uses. It should be expanded to include non-catalog training that can be organized into a workshop.

Conversation with training coordinators can be ongoing. They may be general conversations that you have with the them about their needs. We try to solicit three pieces of information from them: what, when how many. So, we ask what the need is, how many needs it and what time period is acceptable. Appendix A is built to document these pieces of information.

Regardless of how the training need is collected, it will eventually be transferred to another document. This copy of this document is found in Append B and the actual file is called Survey_Matrix_Master-20xx.xlsx within the DEVICE

Training Costs for each course have the following cost components: instructor costs (online costs for remote learning), catering, location of the training with its audio/visual component and printing if necessary. Each item will be discussed below.

Cost Component	Comment
Instructor	Cost to present the course in its current form. These costs have the greatest effect on the budget. Private instructors have the most cost ($250 to $1750 a day) and the NOWCC instructors are the least ($0). The reduced cost of the NOWCC are due to another financial mechanism (NOWCC grant) being used to pay them that does not affect our budget directly.
Course update	These costs are in addition to instructor costs. They are for development of update of materials if necessary. These are negotiated between M4S and the instructor. This cost mainly covers the updates of the slides.
On-line costs	Instructor costs applied toward a remote learning setup.
Lab	If students do not have workstations for a remote learning class, a computer lab may be necessary. Sometime there are expenses here that need to be considered. Each remote learning setup can be different.
Catering	Catering is being minimized to only drinks, hot and cold (coffee and soft drinks). We provide these twice a day – morning (7:45 am) and afternoon (1:30 pm). We do limit the amounts that are provided. These limits are set by the use of historical calculations. Coffee is limited by the calculation of student count * .068 (24 students * .068 = 1.6 gallons (round-up to 2)). Soft drinks are limited by the calculation of student count * 1.1 (24 students * 1.1 = 26 (rounded down))
Location	If the training location – such as a hotel - has these items, we will let them provide through a BEO (Banquet Event Order). If they are not able, we will try to locate a caterer that might provide. The selection of an outside caterer will be determined by the payment arrangements. Normally we are not able to do a direct-billing process (invoice) and a credit card is used. Audio/visual items are handled by the training location. We have never purchased these items outside of the training location.
Printing	Handled by Metro 4/SESARM through a web-based printer service. We use MIMEO, because the web interface is easy to use, and expenses are reasonable. We do ship early, at least two weeks in advance of a class, to take advantage of the maximized savings.

To Select an Instructor, do the following:

(1) Wait until the RFP closeout date has passed.
(2) Review all responses in regard to instructor qualifications, any past history evaluations and cost
    a. Populate the RFP Response Calculator *(this is on the Device called RFPResponseCalculator.xls and a printed copy in Appendix F.)*
    b. Take note of the final scores
(3) Create a bundle of proposal of qualifications bundle of all instructors and send to training coordinator of the host agency with
    a. A summary sheet (with names, any past history evaluations, costs, results of the *RFPResponseCalculator.xsl.*
    b. Copies of the submitted proposals from all the instructors
(4) Ask for host agency feedback after an appropriate time lapse.
(5) Select the instructor based on all information and host agency preferences.
(6) Notify the winning instructor of the acceptance of the bid and that a transmission of a draft contract will be sent in a few days
(7) Notify the other instructors of their non-selection.
(8) Start the production of a Draft contract

A contract template is call Contract-Template-T2019-04-01.docx (Appendix G shows the first two pages only.] is on the Device. Modify as appropriate.

Event Management – yet to be filled out.

Finding location for training class
We have locations across the southeast that we use repeatedly. We try to use governmental facilities wherever possible, because of the lesser expense. Expand this following list, as necessary.

Table 1: Training Location LEGEND: RTC = 'Reserve through local training coordinator'

Hosting Agency	Location	Action	Comment
Alabama	Commissioner Hall at AL DEM 1st floor	RTC	
Georgia	GA EPD, Training Suite	RTC	
Florida	SWD Office North Tampa (Temple Terrace)	RTC	
Kentucky	KY DAQ Conference Room	RTC	
Mississippi	Courtyard by Marriot Jackson Pearl/Airport) (844-234-4091)	Call,	is a favorite location
North Carolina	NC DAQ Meeting Room	RTC	
South Carolina	Springhill Suites (downtown Columbia) (803-978-2333) Embassy Suites (Greystone-Columbia) (803-252-8700) Residence Inn (Irmo SC) (less $) (803-749-7575)	Call	
Tennessee	Fleming Training Center in Murfreesboro, TN (615-	Call,	$150 per day

	898-8090)		
Louisville, KY	At a hotel, somewhere in Hurstbourne, KY	Call,	Convenient location for all but expensive

To Select a new Venue

If you need to select a new venue for a training class or workshop, we look for other governmental facilities available in the area of the host agency. For an example, if Tennessee (TDEC) was hosting a Training Course Type, we would try to use the local state training facility in Murfreesboro, TN. It is shown in the table above. If it is not available, call the other TN State Parks or the local training coordinator to find other possibilities. If these are not doable, you would have to research all gov't facilities.

For meetings, there are considerations when a new venue location is needed. Some of the information that is needed to compare venues against each other are presented below.

Identification	Costs	Support items
Hotel Name	Service Charge (catering)	Parking-Self
Location (complete address)	Service Charge (A/V)	Parking-Valet
Meeting room seat capacity '*'	Sales TX (Overnight rooms)	Features
	Sales TX (Catering)	Drawbacks (problems)
	Sales TX (A/V)	A/V Costs (daily)
		A/V Totals
	Extra fees	Comments
	Per Diem Rate	Transportation costs and concerns
		Sales Coordinator (optional)
	Room Rental for meeting '**'	Wi-Fi (Guest Room)
	F/B Minimum '**'	Wi-Fi (Meeting Room)

'*' Calculate at 2 persons per 6-foot table or 3 per 8-foot table. Workshops or training can use 2 x 6 foot.
'**' A less expensive room rental agreement can be negotiated with higher food and beverage minimums (F/B).

If you need an Excel spreadsheet to help in this document, then open the document VenueCharacteristics.doc on the device.

Need more narrative here?.

Setting Dates for class
Date are set with a coordination with the instructor's and local agency.

For private contractors, we start the RFP process with preferred dates from the hosting agency. We ask for a primary date and an alternate date. These dates will be listed on the RFP when it is published. If an agency does not have dates in mind, ask for exclusionary dates (dates they wish to stay away from). An example is Louisville, KY. They do not want any classes within one week before or after the running of the KY Derby, which takes place during the first weekend in May of each year.

If a the NOWCC group of instructors are being used, we have to work this 'date setting' in a reverse fashion. After the determination of the needed NACT courses has been name, we first request dates from the NOWCC management team. This team may schedule their dates a year in advance. We send a list of courses to the NOWCC manager and request dates for instructor assignment. The NOWCC is receiving requests from multiple MJOs and have to plan the instructor load. Try to get the requested courses in as soon as possible. After the dates are received from the NOWCC, send the dates to the local hosting agency to see if the dates are agreeable. If they are not acceptable request new dates from the NOWCC.

Currently, the NOWCC management teams is comprised of Justin Hall (primary) (justin.hall@epa.gov) and Mary Boyer (4mboyer@gmail.com).

Determining instructor preference for class setup.
Instructor preference are discovered by talking with the instructors.

Preferences could be stated by the instructor regarding the seating arrangement of the class (conventional classroom setup to u-shape), whether they need a flip chart, or do they need breakouts.

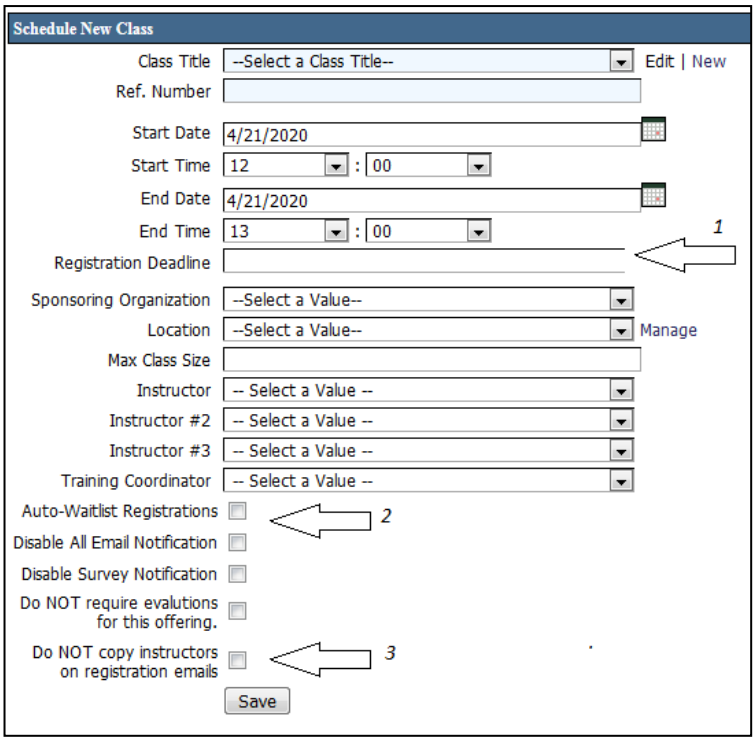
NOWCC instructor have an added preference. This involves the order of class that are being taught within the week. Several instructors may travel to the site and they like to alternate days of instructing. This alternate teaching schedule also effects the breakout (field visits). So, this needs to be close coordinated. For the off-line instructor they need an extra table, placed at the front of the room, for that to sit at.

Logistics involve printing of material, rosters, sign-in sheets, proper setup of the classroom according to the instructors preferences, all breakout (at the training site and field visits), audio/visual support, flipcharts if needed, certificates of completion, retests if needed and catering.

Posting the class
NOTE: with the advent of the new EPA LMS coming online in CY 2021, this section will need to be updated.

These steps are with the existing EPA LMS.
Classes are setup under the following menu path >>www.apti-learn.net>(Login)>Admin>Manage Classroom Titles/Schedules. Fill out the page as seen to the right and select the following options.

(1) Check the Auto-waitlist Registrations options (see arrow 2 in image to the right)
(2) Set the Registration deadline to about 6 weeks before the class. This date will mirror the date to start the seat-awarding process.
(3) Check the 'Do NOT copy instructor on registration emails.
(see arrow 3 in image to the right)
(4) >Save.



NOTE: In the current LMS, there is no feature to hide classes from the published view. When they are published, all can see. If there is any need to restrict registration, the Deadline can used (see arrow 1).

NOTE About the 'Do NOT Copy Instructor on registration emails: Uncheck this option on if you have the instructor's permission to do so.

Figure 1: Creating a new class on the LMS

Rosters exist in two forms: waitlists and awarded seats (enrolled). Waitlists are built to create list of students that have requested a seat in a class. Everyone remains on the waitlist until about 6 weeks before the class. At this 6 week point an analysis is executed and then seats can be awarded.

Awarding a seat.
There is a decision tree process before the awarded seats are given out. This decision tree ensures that the hosting agency has their allotted seats and then the remaining seats are evenly awarded between other agencies among the region and then EPA. We want to include as many out-ot-town folks as possible, since funding is shared among all the Region 4 agencies.

The EPA LMS has the option for waitlist. Our website, Metro 4/SESARM, does not.

Communications with the class
This can start any time after the class is published and students begin to sign up. It advances from pre-class communication, to classroom (face-to-face or long distance), to post-class communications. Below are listed some possible questions that registrants may ask between the time they register, and they receive their final grade for their attendance. So be prepared. At a minimum, they are:

(1) Reason for wait listing when they register (Some will ask why.)
(2) When are seats expected to be awarded?
(3) Some students need a document in advance of the seat award to aid in travel authorization.
(4) What do students need to bring to class (such as a calculator or safety equipment)?
(5) Reminders of class start date and time
(6) Expectations of catering support that Metro 4/SESARM will or will not provide.
(7) A welcoming statement from the instructor(s) is nice. Ask the instructors if they have comments To be added to this welcoming statement.

Note: Each reasoning, listed above, should be communicate as early as possible and no later than 7 days before the class or when the student asks. Recommendation: This could be a prepared document that is automatically sent to all students when they register. (I will include one.)

If you wish to communicate to the class as a whole, >Email the Registrant link on top of the enrollment or waitlist page. The menu path is >>Register> (then find the pertinent class and then) >Manage Enrollments. This link is in the 5th column). A list of registered and waitlisted students will appear. The link for the email is at the top of each panel. The links for managing the waitlist is shown below.

Waiting List for NACT 345 Enforcement Case Development and Resolution on 6/9/2020 8:30:00 AM (# Wait listed: 10)

Enroll Students Checked Below | Add Students to Wait List | Email all Wait List Students | Print Wait List Management Report

Check All | Uncheck All

Actions	Waitlist Order	Date Added To Waitlist	Student Name/Email
Enroll Remove Email	1	12/10/2019 9:54:00 AM	Steven Gravatte steven.gravatte@louisvilleky.gov

Figure 2: the LMS link for email students:

Comment: The most versatile report for managing classes within this LMS is the Print Wait List Management This report (a one-line version is seen above) is handy for building off-line reports with Microsoft Excel. This export is for all classes, not just this one and all MJOs. I wait until the very last possible moment before I take people off the waitlist because of this versatility. IMPORTANT: When the new LMS is ready, we need to ensure that this waitlist reports capability is available.

Breakouts range from the need of an extra room to external yard space for spill drills or a distant external site for industry field visits.

Some NACT courses are designed to include a field trip. These courses are listed in a file on the DEVICE called CourseCatalog-NACT-APTI.docx. It also be seen in Appendix A. Below is a sample of this file. The final column indicates if a field trip is necessary to complement the lecture portion of the class.

Source	Course Id	Course Name	Days	Field Trip
NACT (National Air Compliance Training) Catalog Courses				
NACT	220	Compliance Assurance Monitoring	1-day lecture	
NACT	230	Surface Coating Operations: Metal Parts/Products	1-day lecture	y

Figure 3: NACT course listing sample

The third column indicates the length of the class in days. The majority of the NACT classes are one day in length with a field trip included. The manager of the NOWCC instructors attempts to group 3 to 4 classes days within a workweek. This minimizes travels and maximized instruction time.

Multiple field trips may be needed to be scheduled within a NOWCC training week. When this happens, Metro 4/SESARM must ensure that the field trips are scheduled in a timely fashion even though the host agency has the responsibility to schedule the trips. The local agency is familiar with the industry in their area but Metro4 /SESARM must follow up.

To aid in this process a field trip template is available. This template is called FieldTripTemplate.xls and is located in Appendix D. and on the DEVICE.

When the classes, that need the field trips, are published on the EPA LMS website, send this template to the training coordinator of the hosting agency, so they know the information that needs to be collected.

Instruct the training coordinator to return the template back to you, filled out, so it may be forwarded to the NOWCC instructors about 4-8 weeks before the class.

Before the field trip template is sent to the local training coordinator, prefill it with the information that you are already aware of. Also find out what sequence the instructors wish to present the classes and fill out the template in the same order. This is a must do. The correct order eases the load of these instructors.

The permanent record consists of testing, re-testing, if necessary (as stipulated in the instructor contract), evaluations by student and instructor. During the progression of a class two tests are usually administered: a pre- and post-test. To successfully pass the post-test a grade of 70 has to be achieved. If this does not occur for a student, a re-test is offered. Metro 4/SESARM ensures that the instructor and local training coordinator are working together on this.

Here is a list of the permanent records that are to be retained for this class.

Document Name	How gathered
RFP	Created by MJO Training coordinator
RFP Publishing	Created by MJO Training coordinator by doing a screen print of our webpage
Contract	Created by MJO Training coordinator. Accompanies any invoice to accounts payable
Invoice	Forward to accounts payable with a copy of the instructor contract.
Testing scores?	Pre-test and pos-test and re-tests if necessary. Recorded in current LMS
Evaluations	Students and instructor (recorded in current LMS)
Summary	MJO training-coordinator

To create the permanent record of the publishing of the RFP for auditing purpose, do the following.

(1) Go to our website at www.metro4-sesarm.org
(2) Display the RFP page by clicking on the RFP link on the upper menu.
(3) Make a screen print of this page by pressing the Shift/PrtScr key.
(4) Open the Paint Application on your workstation and paste the screen print into the Paint canvas.
(5) Edit as necessary and print it.
(6) Place this printed image into the training folder. NOTE: (*In the future, when Metro 4/SESARM goes paperless, this image will be placed in a yet-to-be-determined location.)*
(7) Notify the instructors of the publishing of the RFP.
    a. You may email them the RFP directly or
    b. Just let them know of its publishing and location.
        i. The emails addresses of the instructors are located in an Excel file called /SourceDocuments/InstructorListing.xlsx and it exists on the Device.

Instructor selection and contract agreements: needs expanding (RFPs, interviews, acceptance by the hosting agency)

There is a template for RFPs. It is call RFP_Template_Draft.docx that resides on within the Device. This is an eleven-page template and a copy of the first page in found in Appendix E. This template has to be edited carefully as pertinent details are inserted into the documents. When it is completed and the decision has been made to publish, it is placed on our website within the upper menu link (see figure 5) called 'RFP'. Refer to FAQ 14 to do this.

This retest is stipulated in the contract with a private instructor.

At the present time all evaluations of courses are achieved on the LMS. This is a requirement that is programmatically installed in the EPA LMS. The EPA enforces the rule that without an evaluation of the course, the student will not be able to print out a certificate of completion.

The evaluations can be viewed by navigating the LMS under the following menu path >>Reports >Evaluations and filling in the text boxes for the courses. NOTE: You will have to become comfortable with this little report query screen that appears so as locate the course that you are interested in and they press the Detail link. You can export the resultant screen to an Excel file is necessary for manipulation.

The new LMS system will have another way to accomplish this. I have no knowledge of that system.
There are three areas of reporting: academic achievement of the student, evaluation of the instructor, the MJO achievement.

The first is the record of academic achievement of the students. This report is updated at the completion of each class whether the student has 'passed' for 'failed'. The students are then directed to do an evaluation of the class and then print a certificate of completion and then submits that's certificate to their local management. This process is handled by the instructor. The only time we get involved is when the student has 'failed' and needs to the give the option of a re-test.

The second classification is recording the conduct of the instructor and the attendance of the students. The instructor portion is this requirement is originally defined in the instructor contract. We ensure that this report is sent to us and inserted into the permanent file along with a copy of the sign-in. If the report indicates any problems with the class or they are to be addressed.

The third is the record of our achievement of holding the course and many others over the years. It is a composite record of student attendance, student achievement and costs to hold the course. These costs include instructor, facilities, audio/visual, catering and any other incidentals.

The student attendance and achievement are reported to the EPA on a bi-annual basis to fulfill grant requirements.

These achievements can be bundled with other courses (bi-annual, annual and multi-year) to indicate the value of the MJO.

We have a master record of all course held over the past 5 years. It is called TrainingDataFiveYear-Pivot.xlsx and is found on the DEVICE. This Excel spreadsheet will have multiple worksheets in it. The first worksheet is the training data itself over the past 5 years. The second worksheet will be full of pivot tables.

A copy of the portion of the pivot tables is found as Appendix I and is a copy of the information starting on line 167 (Overall Costs Averages) of the first spreadsheet within the workbook. COMMENT: Pivot tables are especially important.

Annual Training Type

The management of these training class is done of the www.apti-learn.net website.

This is a cooperative effort between Metro 4/SESARM (takes the lead), the organizations (E/SL), and instructors (private contractors or the NOWCC team (National Older Workers CC Federal grant).

During the survey process the host agency may indicate their preferred dates. These preferred dates are normally included in the solicitation of instructor services (RFP) so a private contractor may respond accordingly. If no bids are returned you may have to find out why and if these dates are a problem, the may need to be adjusted with the host agencies comment and then republish the RFP. This can be a dynamic situation to get everyone on board.

The situation is a little different if a course is being scheduled with NOWCC instructors. These instructors are scheduled through a centralized manager. At the present time that person is Justin Hall at EPA OAQPS. All requests are sent to him.

We have training locations around the southeast that are commonly used. A list of these locations is contained in the document name Lists-Locations.docx on the DEVICE. When NACT classes are scheduled the decision for training location takes into consideration the need to travel to site locations. The host agency takes the lead in this.

After dates, locations and instructor services are in place, the course can be published.

Publishing the scheduled class

The publishing of the schedule can be achieved in 3 different areas. The first area is by placing the schedule courses on the EPA LMS Website for all to see. This website currently resides at www.apti-learn.net. This web address will change during the first quarter of 2021 as a new EPA Website comes online. The second method is emailing the complete schedule to all training coordinators. The third area is a monthly email to the training coordinators. The emailing ensure that all training coordinator are aware of what has been scheduled. Often the training coordinator fail to view the EPA LMS and look for courses that their agency may be interested in.

Annual Meetings Type

Metro 4/SESARM takes the lead on organizing these meetings. EPA Region 4 designed the bulk of the agendas with input from Metro 4/SESARM.

We have two of these of these types: Air Directors Meetings and an Air Monitoring Workshops (discussed in the next section).

Air Directors Meetings are major, major events for us. They are held twice a year – once in the late spring and late fall. The spring meeting is also called the Spring Grants Planning. These meetings are budgeted in the annual with the Federal Grants.

Air Directors Meeting are expected to occur every 6 months. There is no survey.

The spring meeting is usually held in Atlanta, so a larger number of Region 4 EPA people may attend. The fall meeting rotates through the states around the region. They go in alphabetical order: AL, FL, GA, KY, MS, SC, NC. The fall of 2020 is scheduled to be held in South Carolina. The executive director of the state determines where to hold the meeting or they may defer to us.

I have an Excel template for projecting these costs so as to remain within budget. It is called Template-CateringWorksheet-Att and is on the DEVICE. This Excel workbook uses the first spreadsheet for calculating the costs and the 2nd spreadsheet as a printing tool for sheet 1. The 2nd sheet echoes the values from the 1st spreadsheet, so it can be printed. Several columns and rows are hidden because these are not needed for print. Only the individual row calculations are printed plus subtotals and the grand total.

You can use it or just understand it as you develop your own methods.

The General Meeting Outline in page 16 pertains to this meeting.

We do not manage any transportation needs. The attendees arrange their own from the hotel to the meeting site.

We do print name tags that have a size of 3 x 4 inches and uses a neck strap. AVERY Mfg. Part: 74459

Adding a meeting to our website. This is described in FAQ 2.

Annual Workshops Type

Workshops with no fees (a no-cost fee workshop)

A few workshops do not require fees. We had one during the fall of 2019 in Athens, GA. It was requested by EPA LSASD since the spring 2019 Air Monitoring Workshop was canceled due to government shutdown. We may have another in the fall of 2020 but do not have dates yet.

These meetings include technical training around one of the major mediums such as monitoring, inspection, asbestos or such. More operational personnel (field personnel, technicians, first line of management) attend rather 2nd and 3rd level of management. Our involvement uses the same list of topics to be addressed as to that of a meeting.

We do print name tags that have a size of 2.5 x 3 inches and uses a pin attachment. Need Avery # here.

How do I add a meeting with no fees to our website? This is described in FAQ 2.
How do I register a person other than myself to a no-cost fee workshop? FAQ 9

Workshops with fees

Calculating a fee

Part 1: Calculate the total expenditures for this workshop. Sometimes this takes a little bit of guesswork because you need to estimate your attendance and then the catering quantity to support that number of attendees. To overcome guesswork, I have included a catering worksheet that I have used over the years. It is on the DEVICE and is labeled Template-CateringWorksheet-Att.xls. Use it if you wish or use the one that management provides.

If you use this .xls file, the first worksheet is called, Cost ADM 20xx and can be used to calculate costs. The second spreadsheet is called Print Version 1. This second worksheet pulls in the values from worksheet 1 and allows a simpler printing of the data without the coloring. It is nice to have a worksheet that is used for calculations and then one for printing only. There are two sections to this worksheet. The top section are fixed costs for the meeting room and support equipment. The bottom section contains the variable costs and depend upon your choice of catering quantities.

For variable costs, the total calculation of catering expenditures is based on the maximum attendees possible. This over-production of catering is important. Do not want to leave anybody out unless it is by design and the budget will allow it.
.
After the total cost is calculated you may still round up the cost by a percentage.

Part 2: Calculate credit card expense. The cost to use the Paypal service is 30 cents for each charge plus a 2.9 percent of the charge amount. So, a $100 charge (gross) would incur a $3.20 expense. So, the net revenue gained would be $96.89.

If you wish to ensure that you receive $100 net revenue from each person, the fee of approximately $103 should be charge. At the last Air Monitoring Workshop, we were up to 75% usage of credit cards. So, make sure that you take this increased expenditure into account.

Part 3: Calculate revenue that will be received. How many people will attend? How many will actually pay the fee? Some fees will be waived for special speakers and host agency requests to waive-the-fee.

If you have calculated your expenditures (fixed cost + variable cost + credit card fees) you can go to the next step of dividing this cost over the number of payers that you expect. These variables that come into play as you start this fee calculation process. If you have 100 registrants, it is possible that only 90 to 97 will actually pay a fee. Multiply the actual pay attendee count by the published fee. That is your expected expenditure is 11,000 and you can *guarantee that 88 will pay*, then your fee is $140.00 ($137.50 rounder up to the nearest 10-dollar threshold)

If 100 people will attend, then $10,300 is your expected revenue. If only 97 people will attend, the revenue is $9,991. This might be your worse scenario. Cut down the catering down to meet this financial limitation because catering is the only variable that you have to work with. The expenses for the meeting space, audio/visual, IT and other hardware support are fixed.

How do I add a meeting with a single fee to our website? This is described in FAQ 3.
Viewing and exporting from our website a registration listing for any meeting. This is described in FAQ 4
How do I register a person other than myself to a workshop and pay the fee? FAQ 10

Viewing registrations
is done at two location with the website. The first location is a sub-menu link under the event page. To view this, log into the system as an administrator and select the event from the main menu. Above the description of the event a short sub-menu will appear. Click the Registration link and this list will appear. The view is useful to see the actual count of registered users and who the latest registrants are. This list is presented in natural order in the database, so the last person registered is at the top of the list. If you are viewing an events and people have purchases products, each product will have its own dedicate listing of registered purchases. This allows accurate tallying of products purchased for an event.

The second location is from the >>Admin Menu>Registrations link. When this page appears, every registration that is in system will appear, so we need to restrict this page listing by setting a filter. Set the filter by finding the event name in the text boxes and click 'Apply'. You will then only see the appropriate registrations. You can export this list out to a file by clicking on the XLS button at the bottom of the page. Open the file with Excel. You will get a warning that the file is not an Excel file but open it anyway. After you manipulate the file, save it as a true Excel file. You can use this listing for any reports or printing of rosters.

There is a consideration though. Under the organization column you will need to Search and replace all the prefixes to the organization name. These prefixes are "Local Program", "State Program", "Other". When the webmaster setup the export he was not able to separate these prefixes in the export. This is a nuisance; but can be handle easily with the functions of MS Excel.

Log into the EPA LMS as an Administrator and >Registrations> (Appropriate class)>Manage Enrollments. NOTE: this is in the 4th column.

General Meeting Outline

General Meeting Outline Support	
General	Detailed outlines of what should be considered to accomplish (in outline form).
Air Directors Meeting	Special considerations.
Workshops with Fees	Special considerations.
Workshops without Fees	Special considerations.
Workshops with Exhibitors	Special considerations for main session and exhibition hall

Below are the topic areas that have to be considered for each meeting or workshop. Some of the line items generate costs and effects the budget. It is in an outline form so it can be spoken to in discussions, added to if necessary. It will also be referenced in coming sections.

(1) Hotel interfacing and contracts
- a. main session room rental
  - i. dates and times (defined by the agenda)
  - ii. layout of the room for the main session
    1. set up in classroom style
    2. Have hotel provide a layout drawing with the following considerations
       - a. Main seating for guests at the highest participant count and proper shape (chevron with one aisle, winged with two aisles)
       - b. With Speaker podium
       - c. With Facilitator table with chairs
       - d. With Projector table (properly placed for wide projection on screen)
       - e. With Projector screen (at least 8 ft. in width and height)
       - f. With Catering table (in back or room or hallway)
       - g. With Extra chairs if needed for overflow
         - i. This is optional but attendees appreciate it, so new attendees do not have to walk down front during the meeting
  - iii. breakouts (agenda defined)
    1. Board meetings
    2. Auxiliary meetings
  - iv. projected attendance (new calculation with each meeting)
    1. Agency representative
    2. Speakers listed on agenda
    3. All support staff (including Metro 4/SESARM)
- b. food and beverage
  - i. projections on consumption
  - ii. minimum purchases as stipulated by hotel contract
  - iii. specify limits on delivery of catering to stay within budget (charge on consumption)
- c. direct billing
  - i. setup with an application from the hotel
  - ii. summary of cost liabilities
    1. SCAVIT (space, catering, audio/visual, IT) + SC + tax

            2. overnight rooms for travel support
    d. room blocks
        i. audits (asking for room-block reports from hotel) to catch forgetful registrants
    e. Major consideration of clauses in contracts
        i. Force Majeure clauses with hotels (in case need for cancellation occurs)
        ii. FEMA numbers
    f. other support
        i. audio/visual/IT (refer to next section)
            1. house sound
                a. microphones
                b. mixer
            2. conference calls
                a. telephone line
                b. polycom
            3. WI-FI (usually complimentary but confirm)

            4. laptop charging stations (optional if budget allows)
                a. extensions course
                b. 6 outlet power adaptors
        ii. Transportation
            1. If training site is separated from the overnight accommodate by some distance
        iii. Surprise considerations
            1. A hotel once quoted a charge a daily tablecloth cleaning fee
                a. It was a three-day meeting and we only agreed to pay for one day.

(2) registrations
    a. by website
    b. by agenda
    c. publishing of the roster to registrants for their confirmations
(3) Printing
    a. Name tags
    b. Rosters
(4) Registration Fees
    a. None for meetings funded with grants
    b. Fees may be required by workshops.

Audio/Visual/IT Support of meetings.

We have 5 wireless microphones in our office. Two of them are digital and 3 are analog. The 2 digital microphones were purchased first, and they worked satisfactory in the first location of usage but later they began to sporadically cutout and on. We do not know why and only conjecture about the reasons. So, the analog microphones were purchased, and no problems have become evident.

During a meeting, the distribution of microphones has been for one being used at the podium for speakers and the other two being used as rovers. Many times, questions are asked by attendees but not heard across the room although the speaker claims that they speak loud enough. The microphone ensures question and responses can be heard for the importance that they hold.

A single microphone unit comes in pairs. The handheld portion is used by a speaker and its receiver is placed near the entrance into the house sound connection. This connection is usually a mixer. A mixer receives audio from different receivers and channels then all into a single signal that goes into the house sound.

All three receivers are connected into the mixer and the mixer is connected to the house sound. Hotels will charge a connect fee to the house sound that this charge usually includes the mixer.

For a receiver to pick up the signal from the microphone, it has to be set to the same channel as the microphone. The channels are adjusted on both the microphone and on the receiver panel. This matching of channels is indicated by either a numeric number of an alpha-numeric pairing.

As you set up the system, pay close attention to your channels. We try to put the main speaker microphone on channel 1 or 1A and the rovers on subsequent channels 2 and 3 or 2Aa and 3A. Each channel has its own volume control and then a Master volume control for the entire mixer. These levels have to be set and monitored for clarity.

During operations of the system, the biggest concern is battery usage. There are indicators on the microphones and receivers of battery strength. The microphones have green LED light that turn to red, when battery life is becoming low and start flashing red when the audio is close to completely shutting down. The receivers also have indicators. Become familiar with these indicators.

A life of a new set of batteries in a microphone may last for days, if the microphone is shutoff during non-use. It the microphone is left on continually it may last for about a day. Always know where the spare batteries and do not skimp on their purchase. Keep a pair of new batteries in your pocket at all time, so you do not have to run back to your stash of batteries at an inopportune time.

Like I mentioned earlier the hotel charges a connect fee for the house sound usage. Make sure that the charge includes the mixer. We have a spare mixer, but it is better to use theirs. Always have the hotel audio technician show you how to use their mixer.

We have a polycom speaker phone for conference calls. To use it, the hotel is to supply a hardwired telephone line. This line incurs a daily charge and has to be setup by the hotel technician, who runs it to the table where the polycom sits, tapes the telephone line down to the floor, and hooks it up to the polycom interface. The polycom interface is a large oblong shapes device that has three hookups. The first hookup for the A.C. power and is just a set of prongs that plugs in the wall or any outlet. The second hookup is the telephone line. The Third hookup is a thick telephone cord that runs to the polycom. This thick cord contains the power and audio line to the polycom

As soon as the polycom is hooked up it should make a ‘ding’ sound. If the phone line is live just press the appropriate button and you will get a dial tone. Ask the hotel technician for the code for access to the outside line. It is usually just a one-digit number like ‘9’ or ‘1’.

During a meeting when a two-way conversation is needed, we place one of the rover microphones over the polycom speaker, so the audio is picked up and piped into the house speakers. This is an advantage of having wireless microphones.

We try to provide laptop charging stations around the meeting room for the Air Directors Meeting. This is an extension cord and multiple-outlet bar. We try to provide 6 around the room. The hotel charges for this service.

We have an aging projector that we use at the Air Directors Meeting. It works simply fine but is takes time to familiarize yourself to it. I do not setup it up, so I cannot help describing what it takes to get a desired image (width/height/brightness) on the projector screen.

The hotel always provides the projector screen. Do not using anything less than 8 feet wide and 8 feet tall. Sometimes the hotel will have a wall mounted projector screen and comes with the meeting room rental.

One man shows. If you have the need to support a meeting in an isolated location. You may bring your own sound.

Audio/visual Equipment List

Audio/Visual Name		**Description**	**Comment**
Microphones (Wireless)	Digital	2 Shure Model	With receivers. Audio tends to drop out
	Analog	3 Shure Models	With receivers. Very solid.
Mixer	**Mackie**	2 channels	
Polycom			Conferencing
Projector			
Clicker			In projector bag with 2 AAA batteries.
Computer Speakers			**Hooks up to a laptop computer or the Mackie Mixer**

Website

Training Websites	
Websites	Metro 4/SESARM (our websites) ELMS (EPA Learning Management System: APTI-Learn)

Our Metro 4/SESARM website at www.metro4-sesarm.org

Our website is built on a Drupal 7 Content Management System with eCommerce. Drupal 7 is hard to learn but is popular, so support is easy to find for this framework is open ended and can be extended to include almost any functionality. We only use a fraction of Drupal's capability. If you have the time, here is a website link that talks about easing the learning curve to learn: https://www.drupal.org/node/877140. There is a copy of this document on the DEVICE.

Simple content management functions have to be learned. This document will include a description of a few of them that were created for our needs. I hope that I can explain in easy learnable fashion.

It was built by Michael Watt of Michael Watt Designs. Michael manages websites on a part time basis. He is considered as our Webmaster. <need contact information here>

Our website does not receive a lot of traffic and the heaviest activity occurs during the registration periods of meetings and workshops.

Sometimes we charge a Registration fee for a workshop and use the eCommerce part of the site to collect fees if registrants wish to use a credit card. This service interfaces with a server managed by Paypal.

There are two menu that we use often. They are the Main (with 6 links and a 7th after a person logs into their account and Upper Menu (with 6 links) as seen below.

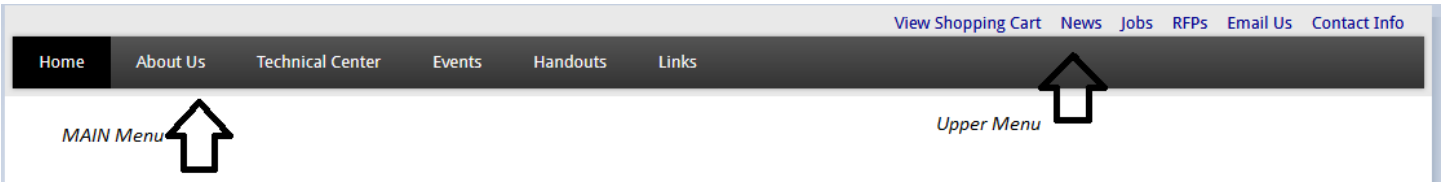


Figure 4: Main and Upper Menus

Metro 4/SESARM support components	
Managing content	Administrative menus
Paypal	Fees, credentials to access, their website, refunds, policy, transfers to bank, problems that generate questions
Roles	The 'where' and 'why' they are important.
Page progression	The progression of pages used during a registration (refer to FAQ 11)
Products	The why we use them.
Orders	The why they are in the system and where we manage then where we do not.

Managing content is what a website does. Drupal is no different and handles it well after you learn how to use it. Everything is called content from images to text.

The image below is a copy of the Drupal Administrator menu. When you log into the website as an administrator of the site, this extra menu appears at the top of the web browser. Through this menu an administrator will be able to add, edit, and re-order content on the website. It does take a while to learn.

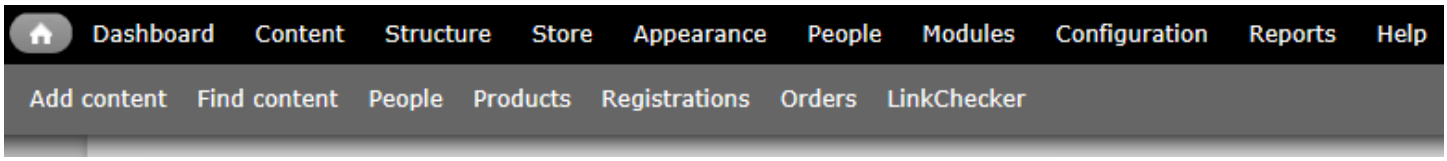


Figure 5: The Drupal Administrator Menu

Most of the menu items on the second line was added by the webmaster to give shortcuts to certain functions. The Link Checker is a recent addition.

Some Basic things

Anyone can register on the website and create an account. When they do a role of an 'unauthenticated user' is assigned to them. We do not use authentication. They are used to manage security within the website.

For anyone to register on the website they must have an account. The account they create contains an email address to register. Email is extremely important. Once it is setup, they can either register themselves or be registered by someone else (who has a role of 'Staff' on the system: FAQ 10) for an event.

Paypal

It is used for the for the eCommerce needs of our website, Paypal is used to process credit cards. It is tied into the website starting at the payment screen as seen here. When the PayPal option is selected and the 'continue button' is pressed, the Paypal service takes over. This is the only entrance to the PayPal service from our website.

Figure 6: Selecting the payment option (pg. 6 pg. FAQ 11)

Paypal fees: 30 cents per transaction plus a 2.9 % fee

Credentials to access Paypal: There are two access points to Paypal. The first access point is from the website. This was originally setup by our Webmaster and Ken Powell. Ken's name is still on the credentialed account although my email address is being used. The second access point is through the PayPal website itself (www.paypal.com). There is a manila folder, labeled PayPal, on my desk that has have the sign-in information.

The Paypal website: This website is exhaustive with its options and reporting capabilities. Explore the options to appreciate the support that it offers. Find out how to print out the monthly statements and download the

user defined activity reports. These reports are represented in several formats. The more common versions that we use are the Acrobat (.pdf) versions and the CSV ('comma separated values') files. The CSV files are the most versatile to use because they can be exported into MS Excel and then saved as a real Excel file (.xlsx). COMMENT: This file has to be saved as Excel files before any spreadsheet calculations can be done. There are no formulas in CSV files. Do no editing of formulas with CSV files. Your changes will be lost.

Paypal refunds: These are easy to do on a single transaction. The hardest part is to find the transaction and display it on your screen. There is a small link on the transaction that reads "Issue Refund". Press this link the Refund screen will appear. You will be able to set the amount of the Refund in a text box. The value of the refund defaults to the 'gross' amount, but you may change it. However, there may be an addition PayPal fee if the refunded amount does not equal this 'gross' amount.

Refund policy: The percentage of a refund is a decision to be made by the Executive Director for each situation. A refund of 100% incurs no extra fee, but a different percentage may create a new service charge.

Transfers to our bank: Transfers are executed once per event and usually right before we need to pay an invoice for that event. That decision enables to clearly see the flow of money through PayPal for each event.

We have never had two paying events running concurrently. Even though running concurrent events would complicate the reconciliation of the balances for separate events, it can be still be accomplished through exported Activity Reports into Excel and the Monthly Statements.

Problems with Paypal: Federal or Agency credit cards restrictions with Paypal. Sometimes the address of the person using the card does not match the address for the Credit card. Both of these problems are solved by the user of the card and not Metro 4/SESARM.

Roles is part of the security system within the Drupal framework. You are able to create roles and assign permissions for actions to those roles. Then users are assigned to a role or multiple roles.
This is a core Drupal functionality and is found under the >>Admin>People>Roles link. This security feature and others, not described here, makes Drupal suitable for high level organization.

The use of a User Id or Email address to register someone is only a matter of convenience to the user. Either user id or email address is used to locate an account when either registering for a meeting or purchasing a product.

The Shopping Cart
Every purchase goes through the shopping cart for confirmation by the user.

The "Continuation page" gives the user the ability to assign accounts (called Myself, Other Account, Other user) to the purchase of products. This is a requirement of the system. Every product that is purchased in assign to an account. This allow tracking of our products being purchased and to display on the Event Registration page.

The website uses the concept of purchasing products from a store to implement our eCommerce part of the site. Products are used in the sense that we sell item to exhibitors. The ability to purchasing products, that you have set up, gives the registrant the ability to purchase just what they desire.

We have to create a product, attach it an event and then activate it.

We break up the description of the parts of an exhibition at one of our workshops and sell each one separately. Each part is called a product. The parts of an exhibition can include many different items. Some basic ones that we deal will are 'exhibition space',' how many tables do you need', 'need electrical power',' how many associates will be present' You can extend this to include any product (more or less) that you wish to manage.

The expenditures for individual product are calculated and offered as a fee for those individual products. Here is an example from the website

Other Products

SKU	Title	Price	Quantity
20AAB	2020 Exhibition Space Fee	$66.00	0
20ACM	2020 Table Charge (optional)	$120.00	0
20ADM	2020 Power Charge (optional)	$56.00	0
20AMN	2020 For each associate who attends (1 or greater)	$45.00	0

CALCULATION EXAMPLES OF FEES for a combination of products.

- One associate with table and power: $66 + $45 + $56 + $120 = $287
- Two Associates with 2 tables and power: $66 + $45 + $45 + $56 + $120 + $120 = $452
- One associate paying for themselves (sitting with another exhibitor): $45

Description of sample charges:

- The 220 Exhibition Space Fee is calculated by taking the total charge for the exhibition hall and divided by the minimum number of exhibitors that you guarantee to be there.
- The 2020 Table Charge is set by the hotel directly
- The 2020 Power Charge is also set by the hotel directly.
- The 2020 Associate Charge is based on the expected expenditures for catering divided by the number of associated that will be there.

Each product fee is rounded up to include Credit Card fees of approximately 3% (Paypal charges 2.9% + 30 cents). This method allows each exhibitor to pick and choose their desires.

The projected counts for exhibits and associates are challenging.

How to setup a product on the M4S website. This is also covered in FAQ 8**. Make sure that this match.**

Sign in as an administrator and click on the >>Administrator Menu>Store>Create a Products.
Give it a SKU (pronounced 'skew') number. A SKU number is a term from inventory management. This is a unique identifier of the product in your inventory. I create the SKU numbers using a combination of Workshop Identifier and a time period and item: A SKU of 2020AMWSpace would indicate a year, meeting indicator, and item type. So, this would read as a product charge for space for the 2020 Air Monitoring Workshop. Then give

it a description and a price. Under this naming convention, you could create 2020AMWElectical, 2020AMWAssociate, and 2020AMWTable.

It is an artform to encode as much information into the SKU and make it decipherable. When you finished save the product.

Add a product to an event.
Making a product visible
Making a registration visible

Orders are created when everyone purchases a registration by a fee or purchase a product.
Every time a person creates a registration for anything that requires a fee submittal an order is created within the system. We do not track these orders, because we do everything off-line in an Excel spreadsheet. We do monitor these orders for activity and to confirm proper calculations of fees, but we do not audit this information in a pure accounting sense. The potential is there to do so, but we do not have enough activity to warrant it, in my opinion.

It is good to understand how the orders works, because it allows you manipulate the status of order, because the system interfaces with the Shopping Cart. Here is what I mean.

If a person registers and creates an order many times they select to receive an invoice. Then at some later time they decide to pay by credit card. This creates a problem.

Problem: How do I help a person change their payment option from Invoice to credit card? (refer to FAQx)

Solution 1 for a single payer: Delete their registration and let them start over. This is the simplest way and is okay if the user is paying for one person. If there are multiple persons, then this is too cumbersome.
Solution 2 for multiple payers: You can delete all the registrations if you can find them. Or you could place the orders back in the shopping cart by editing the Order and changing the status to 'shopping cart'. This moves the order back into the shopping cart. Then tell the user to click on 'View My Shopping Cart' on the upper menu of the website and continue from there. Need to confirm this.

Page Progression
The progression of pages used during a registration (refer to FAQ 11)

Hidden File Storage using FTP
See FAQ 14 for detailed instructions

The EPA Learning Management System (ELMS)

This website is found at www.apti-learn.net and is used to published the organization of classes, register students, communicate to those students, record their grades, allow them to print a certificate.

In comparisons to the new generation of LMS, this has ancient architecture. It is more of an LMS browser of materials, courses, classes, students. Managing the system is manual by analyzing waitlists, rosters, grades

and evaluations. It is limited and was really was not completed with a user in mind. It is not intuitive, and it takes months to find out where things are.

a. Problems with current LMS
   i. Multiple profiles get created for the same person
   ii. No way to mark inactive student.
   iii. Not very friendly when resetting passwords.
   iv. Not intuitive to find certain pieces of information
b. New LMS
   i. Planned to come online in January 2021.
   ii. State-of-the –art design
   iii. Designed with long distant learning in mind
   iv. Training
      1. Will need an administrator from Region 4 at the beginning of FY 2021
      2. Will be trained during the first quarter of FY 2021 to the use of the system
      3. A lot of emphasize will be placed on configuring the system
      a. Hierarchies
      b. Portals is decided to be used.
      c. Curriculums

Websites - Support

Support Websites	
Printing	Description of commonly used websites: MIMEO (Printing) Paypal (fee-submittals by credit on the Metro 4/SESARM website)

MIMEO This website is used for printing. It is not linked to by any other website. It is a detailed and complicated task to be accomplished for a class. It is easy to lose track of what documents need to be printed. Each printing follows the same steps but is complicated by the number of separate manuals that need to be printed (NACT classes have a slide manual for each one-day and APTI class have one technical and one slide manual).

There are multiple documents to print for each class: technical manuals, manuals built from Power Point slides, handouts, exercises, agendas, rosters, table tents and sign-in sheets. Most of these are not subject to change after they are built. They are printed, bounded and shipped to the training location The Sign-in Sheet is the exception. This document needs to be as accurate as possible during the class cycle, so it may vary as the class date approaches as students drop out of the class or are added. This last document is sent to the training coordinator a day or two before the class begins the training coordinator will print it.

I have created another document with the instructions to actually do the printing. It is called MIMEO-Printing-Document.docx on the DEVICE.

Other Support

Other support	
Section	Description
JTC	What the JTC is [no details yet]
Audio/Visual/IT	What equipment we have to support the different facets.

The Joint Training Committee (JTC) is a consortium of states, multi-jurisdictional organizations (MJOs), and U.S. EPA that organizes resources for the National Air Pollution Training Program and oversees strategies. *The primary objective of the JTC is to deliver timely and relevant training opportunities to state and local air agencies. The members of this committee serve in three roles: part of the steering committee, workgroups (4) and participant at large.*

<u>Steering Committee</u>
Provides governance to the JTC, sets priorities, and reviews communications and deliverables. Is divided into 4 workgroups.

<u>Planning and Support WG</u>
Identifies training needs and conducts outreach on JTC activities

<u>Curriculum WG</u>
Reviews, maintains, and updates course materials; and develops new courses

Learning Management System (LMS) WG
Designs, implements, and maintains new national LMS

Training Delivery WG
Identifies and designs innovative ways to deliver training to air planning agencies

There is always an ongoing request for participation
Who: State/local agency training staff, programmatic subject matter experts?
What: 1-20 hours/month
Why: Contribute to the growth and development of air quality planning across the country
Skills Needed: Knowledge of state/local training priorities/needs; expertise in planning, technical, and other training curriculum subject matter areas; expertise in training delivery, teaching, learning technologies

Additional Information
Learn more about the new JTC organization from the National Training Program Wiki (link).

Miscellaneous

Miscellaneous	
Section	Description
Backups	Where it is and what is on it.
Webinars	[no details yet]
Lists	Lists that are maintained: Instructors, Training coordinators, Exhibitors, E-Lists, commonly use hotels, low cost training locations.
Document Scanning	[no details yet]
Credential for Accounts	All my passwords for website and workstation.

Backups
There is a 1 terabyte solid state drive on the training workstation. It is being used as a storage device for:
Training materials that we have paid to be modified for new training course.
They will eventually be uploaded to the EPA LMS.
Storage for this document and all support materials for this document.

Webinars Do not know much about this.

Lists
1. Instructors that we send RFP's to (attachment and file)
2. Training coordinators across the region. (attachment and file)
3. Exhibitor's that we invite to monitoring workshops. (attachment and file t)
4. E-Lists that the executive director maintains (attachment and file)
5. List of commonly used hotels around the region. (attachment and file)
6. List of low-cost training locations (attachment and file)

Document scanning is being considered. The file naming structure is being designed and will be confirmed by the Executive Director at the appropriate time.

Credentials for accounts

Service	Website	Login ID	PW
PayPal	www.paypal.com	carson@metro4-sesarm.org	526SuiteF
Paypal	(security questions)	What was the name of your first school?	sesarm1 (all lowercase)
		What was the name of your first pet?	sesarm2 (all lowercase)
Mimeo	www.mimeo.com	carson@metro4-sesarm.org	carson@metro4-sesarm.org
EPA LMS	www.apti-learn.net	carson@metro4-sesarm.org	carson@metro4-sesarm.orgrdc
Our website	www.metro 4/sesarm.org	rider1956	SESARM
The Training workstation		carson	SESARM

Figure 7: Credentials

FAQs

Legend for FAQs	
>>	This symbol means to start at the menu it points to.
>	This means to click on the next link, button or menu item that is being described by the text that immediately follows the symbol. As an example: >>Main Menu>Events> (Appropriate Menu Link of your choice) reads as Start at the Main Menu bar and then click Events and then the menu option of your choice. The example of >>DrupalAdminMenu>Add Content>Event reads as start on the Drupal Admin Menu and click on the Add Content Link and then the Event link.
Italics	This text is comments.
Regular text	This text is instructions.

Figure 8: Legend for all FAQs.

FAQ 1. How do I reset a password?

a. Log in as an administrator
b. >>DrupalAdminMenu > People
c. *Find the account by doing the following*
   1. Enter in three first letters of the person's last name in the Last Name text box. *A list of names will appear. Select the appropriate one. If their does not appear, either they do not have an account, or your entries are incorrect.*
   2. Select the appropriate name and Click Apply. *Another list of names will appear in the bottom panel.*
   3. Select the appropriate name and click 'Edit'. *Their profile screen should appear.*
d. Enter in a default password in the Password and Confirm Password text boxes
e. Click 'Save' at the bottom of the panel.
f. Contact the user of the account, update them of the new password, and instruct them to login and edit the profile to their preference.

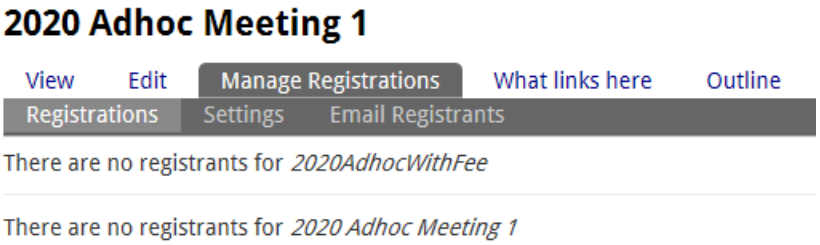
FAQ 2. How do I add a no-cost meeting to the website?

a. Log in as an administrator
b. >>DrupalAdminMenu>Add content>Event
c. Create the title *(using a preferred naming convention for easy lookups)*, update the dates and event description
d. Keep the text format to Full HTML *(this keeps it simple)*
e. Upload an agenda if you have one
f. Select an event location
g. Set Status to 'active'
h. Leave Registration and other products to 'none'
i. Set Begin Registration to 'Event' *(this enables people to register for this meeting)*
j. >> 'Provide Menu Link' and then enter in Menu Link Title
k. Select Parent item *(this attaches this to the main menu)*

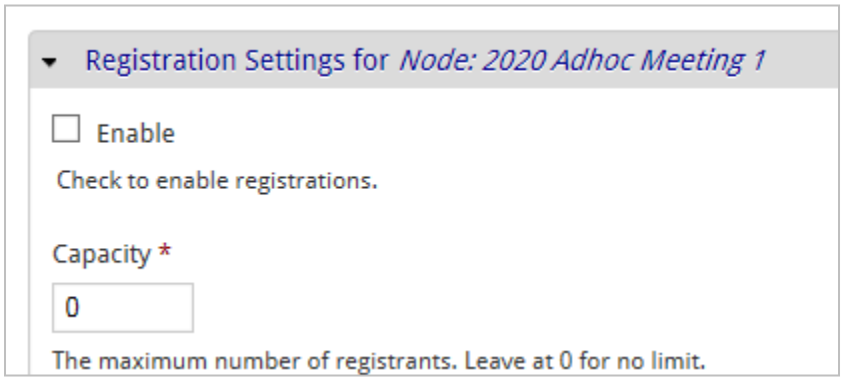
l. Click Save
m. *COMMENT: Unpublish the event if you wish to hide it from the calendar. This option is right about the Save button.*

FAQ 3. How do I change a no-cost meeting to one that requires a fee?

a. Create a no-cost meeting first.
b. *Create a registration fee from the Drupal Admin Menu* >> Products>Add a product > Create registration,
c. Fill in SKU, title, prices, set status to 'Active, and Registration to 'event' and save the registration. *Remember this SKU code for later selection*
d. Locate the no-cost meeting that has been created and edit it.
e. Find the new registration *(by its SKU code that you just created)* and select it.
f. Save this event.
g. Locate this event and edit it
h. Click 'Manage Registrations". *A smaller menu bar appears as seen below. There should be two registration listings. The registration that has the same name as the event is to be deactivated. The sample event below is called 2020 Adhoc Meeting 1 and the registration product with the same name is to be eliminated.*



i.
j. >> Settings. *(A configuration panel for each registrant item will appear)*
k. >>The same name registration list. *(A configuration panel for each registrant with a long will appear. The first option – Enable - is the one to change.)*



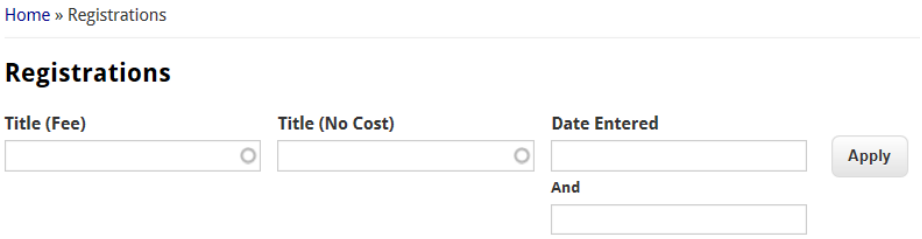
l.
Figure 9: Enabling registrations

m. De-select the Enable button and Save.

FAQ 4. How do I produce a registration listing for any meeting on M4S?

a. Login as an administrator
b. >>DrupalAdminMenu>Registrations

c. The page will appear with search filters to define.



(If the sought-after registrations belong to a meeting that requires a fee, use the Title (Fee) text box in the next step. If not use the Title (No Cost) text box.)

d. Enter in a partial title of the event. *(As an example, if you created the meeting with a title name that contains the text 'Monitoring', enter "mon".)* A list of titles will appear. Select the title you are looking for and ….
e. >Apply Button *(All the registrations will then appear in the bottom panel.)*
f. >XLS button *(This exports the registration in the bottom panel into a CSV (comma separated values) file.)*
g. *(NOTE: These next steps are outside the website.)*
h. Open the file in MS Excel *(Ignore the warning and open anyway.)*
i. Save as a real Excel file.
j. Manipulate the data as you desire.

FAQ 5. Eight people have registered and requested invoices. Now they want to pay by credit card and do it all together. How is this accomplished?

There is one way to accomplish this. It involves deleting the reservations of all 8 people from the Registrations page. Do step a. through e. from the previous FAQ 4.

e. >Apply Button *(All the registrations will then appear in the bottom panel.)*
f. >Click on the Business phone header (6th column of the registration panel.) *(This will resort the registration by phone number so names appear together by agency Find a registration that you wish to delete …)*
g. >Delete *(This is in the last column.)*
h. >Confirm the deletion. *(Repeat each registration.)*
i. *(After all the entries have been deleted have the agency start the process of registering again and when they get to the Shopping Cart change the quantity to 8 and then…)*
j. >Continue Button.
k. *(The Continue page will ask for the email address of all the agency members.)*

FAQ 6 .What is the quickest way to get eight people registered from one agency with one CC or invoice payment? This involves the communications concerning the meeting and fee submittal requirements. Within the announcement include the advice that if a group of people wish to pay together, they need to designate someone to handle this. Send all names to this designate who will register and submit their fees. This designate will log into the system and start the registration process. During this process, the designate will adjust their 'Shopping Cart' quantity to include everyone. All fees need to go through the 'Shopping Cart' and the 'Continuation' page that follows. On the 'Continuation' page, the email addresses of all registrants will be added to the invoice.

This process does require every person who will attend to have an account on the website.

Here is a sample of an announcement. Re-adjust for clarity before use.

"This <event name> is now open for registration. The cost for a single registrant for this <event name> is $xx. If your agency wishes to send a group of attendees, please designate someone to register them and submit the fee payment as a group. For each person that wishes to be added to a group, make sure that your account is active and up to date on the system. Your designate will need your email address to add your name to the group invoice."

FAQ 7. How do you change the method of payment (invoice to credit card) for someone?

COMMENT: The administrator does not change this option but allows the registrant to do it. This is accomplished by moving the registrants' invoice back into the 'shopping cart' and letting the registrant back into the process.

The administrator accomplishes the following steps.

g. Performs steps a. through e. in FAQ 4 *(to pull up the registration for the appropriate event)*
h. *(You can resort the Work Order Id. By >Order Header)*
i. >The appropriate Work Order Id. *(the order page will appear.)*

g. Change the 'Status' to Shopping cart: Shopping Cart *(as seen in the image to the left)*
h. >Save.
i. Instruct the registrant to view their shopping cart and > 'Continue Button' from there.

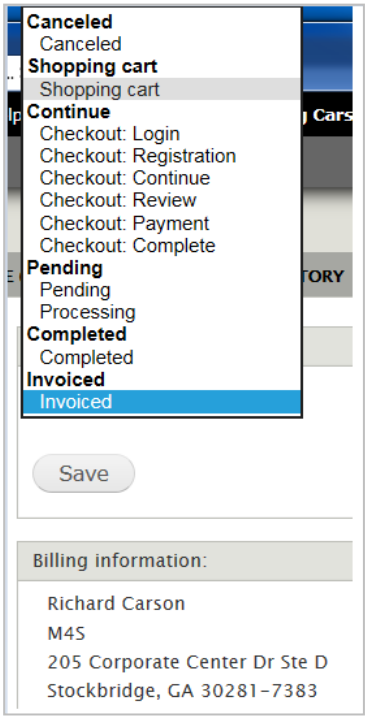


Figure 10: Changing the status of an order.

FAQ 8. How do I add a product to an event to allow its purchase?

COMMENT: to be able to sell them to exhibitor during the annual Air Monitoring Meetings. This is an optional approach to managing fee submittals.

a. Create a no-cost event using the instruction in FAQ 2.
b. >>Admin Menu>Products> Add a Product
c. Enter in SKU *(that you can remember and is easy to decipher as belonging to this event)*
d. Edit title, price, set status = 'active', set product register to 'Event', set registration setting to 'Enable'
e. >Save
f. *(Locate your event and …)*
g. >Edit
h. Within the list of 'Other products' select the product that you just created
i. >Save
j. *(If you wish to add more product repeat step b. Through e.)*

k. (select each product that you create in step h.)

FAQ 9. How do I register another person for a meeting?

As an administrator you always have the ability access to do this. You designate some else on the 'Continue' page, this page appears after the Shopping Cart Confirmation. Refer to the left image below. You can select Myself or one of the other methods: 'Other Account' or 'Other person'.

The 'Other Account' method allow searches for the user's name and 'Other person' for email addresses. After you designate the method, an extra entry box will appear and. Refer to the image below. Just enter in the first three letters of the person's name in this new entry box and a list of account names will appear.

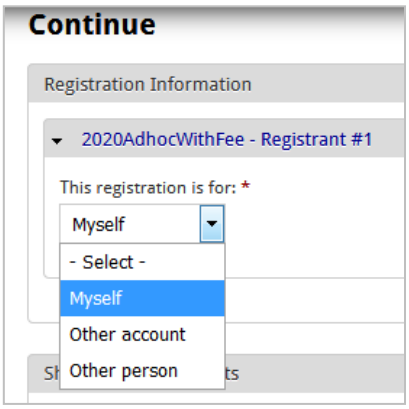


Figure 12 Selecting the method of registration assignment.

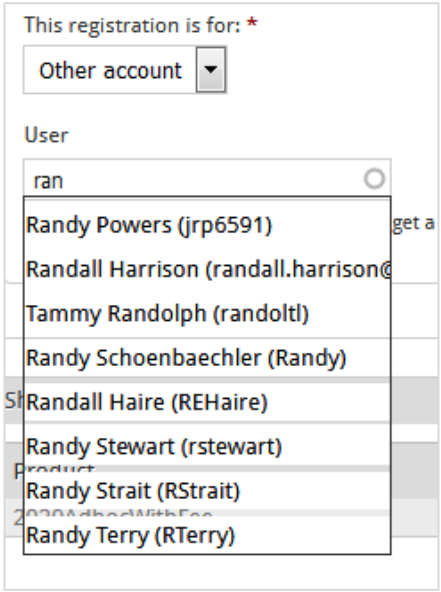


Figure 11: Using 'wildcards 'to locate an account.

FAQ 10. How do I allow someone else to register and submit the registration fee for other person?

This process is similar to FAQ 9 except there is one precondition the must exist. The other person has to be designate as a 'Staff' person. Staff people have permission to use the multiple methods that are mentioned in FAQ 9.

This is accomplished by following the directions for steps 1 – 3 of the FAQ 1, 'How do I reset a password?'.

When you get to the account profile select the 'Staff' option in the list of Roles and then >Save. This will give them the necessary permissions to access the alternate methods.

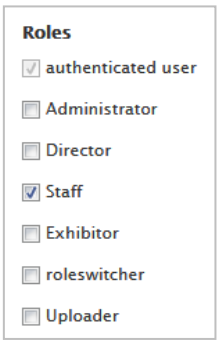


Figure 13: The Select a Role panel when editing a user account.

FAQ 11. Why are there so many pages to go through to register someone?

The system is multi-purpose. It allows the registration of multiple people, purchase of multiple products and the submittal of appropriate fees in one website. Each function causes a complexity to be added to the system. The model that the system mimics is that

of a Store where products are purchased. Below is a short description of each page.

#	Page Name	Description
1	Home Page ↓	Where a guest may view the public pages under the various menu option and authenticated users can register for events: >> Home Menu > Events > (Appropriate Event Name).
2	Event Page ↓	View the description of the event, download any attached files, access to links to other websites that pertain to the event. Purchase products by designating counts or start the registration process.
3	Start Registration Button ↓	Just press the first blue button to continue to the next page, 'Shopping Cart'.
4	Shopping Cart ↓	Adjust the amount of registrations that you are setting
5	Continue ↓	Allows the assignments of accounts for each registration that is being designated. If you designate a count of 3 in the shopping cart, this page will ask for three accounts. Refer to FAQ 9 for a description of this process.
6	Payment Setup ↓	Confirms the entries from the previous page, 'Continue' and allows the user to designate an invoice to be sent to them or select the credit service through Paypal.
7	Paypal Intro ↓	Allow the user to designate the use of a Paypal account (previously setup and out-of-the scope of this FAQ) or the use of their Credit Card. NOTE: A Paypal account is not necessary to continue to use a Credit Card. It is just a server used to process the card. Select 'No'.
8	Paypal Payment	To allow the user to designate their CC for use and any other identification needs.

Figure 14: You cycle through these screens when registering.

FAQ 12. How can I enhance the look of a basic page when I create an event or meeting?

The reason for this FAQ is the fact that the editor in our version of Drupal (version 7) is a little cumbersome in relationship to efficiency of as MS Word. You can add text by just typing it in, but formatting can be a little frustrating. So, I added this short description of an approach to help.

I do not use this default editor for the bulk of text in a description of an event. I use an off-line editor like MS Word to create the bulk of the text and then copy it to the meeting description box. Here is an example. The text below in the box was created in MS Word and will import into the meeting description easily. After you get it into the meeting description (by doing a copy and paste with the CTRL-C and CTRL-V key combinations), the website editor can be used to highlight, embolden, change colors and add links to external document.

Purpose: This is a periodic workshop for air pollution control program permit managers and staff from the local and state agencies in EPA's Region 4 as well as EPA staff. Please note that the formal workshop begins at 1:00 p.m. EDT on May 2. However, there will be an optional local and state agency pre-meeting starting at 9:00 a.m. on May 2. EPA staff should not plan on attending this Tuesday morning session.
Workshop registration: By March 15, please register for the workshop. If you are not logged in, please do so on the left margin of this page. When logged in, proceed to the bottom of this page to "Begin Registration."

Registration fee: None.

Meeting location: Atlanta Federal Center, 3rd Floor, Atlanta-Augusta Room. You will need picture ID to enter the Federal Center. Please view the attached map below for the locations of the Federal Center and the Holiday Inn Express & Suites Atlanta Downtown.

Overnight rooms: A room block has been set up at the Holiday Inn Express, 111 Cone Street NW. The local and toll-free numbers for reservations are 404-524-7000 and 800-465-4329. Ask for Group Code "EFG" or use this link: Permit Workshop-EPA. Nightly room cost: $161.60 per night ($135 + 16.0% tax and $5.00 city fee). The deadline for hotel reservations is March 31.
Hotel parking fee: $25.00/day. Valet parking is the only option directly serving this hotel.

Transportation:

- From the airport: The MARTA rail system picks up at the airport. Follow the MARTA signs in the baggage claim area. The nearest drop-off station to the Federal Center is Five Points; for the Holiday Inn it is Peachtree Center (N1). Taxicab fare is approximately $35.00 plus tip.

Miscellaneous information:

- EPA may be able to provide Wi-Fi access in the Federal Center, but this is subject to confirmation.
- Light snacks and refreshments will be available throughout each day of the meeting.
- Recommended attire is business casual.

Agenda: The current agenda for the workshop may be accessed at "Agenda" below.

Questions: Please direct any questions about the workshop to carson@metro4-sesarm.org.

FAQ 13. How can create links in a basic page?

Place the cursor where the link should reside and press the key combination CTRL-K. A link box will appear, as seen below. Do the following inside this link box:

(1) In the Display Text box, enter in the text that you wish to appear in the document in the box.
(2) In the URL text box, enter in the address of the external website.
(3) >OK. *(The simple link will be placed in the document.)*

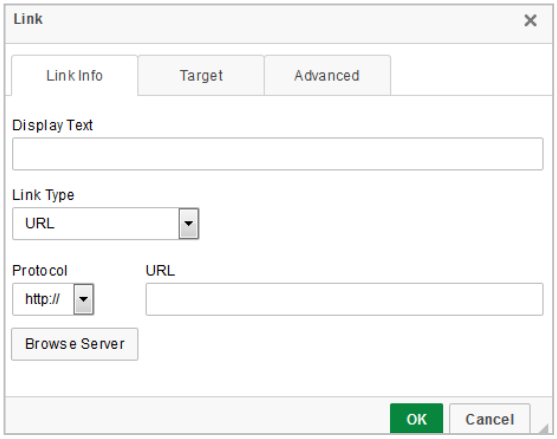


Figure 15: Linking an external webpage

When you get back to the document, improve the readability of the link with a color/font size change or embolden/ 'underline' it.

To create a link to a document instead of an external webpage, do the following:

(1) Place the cursor at the appropriate place and open the link Box (CTRL-K).
(2) >Browse Server *(another small box will appear that shows all the available files to link to)*
(3) *If the file is in the right panel, > (the chosen file) and then >* Insert file.

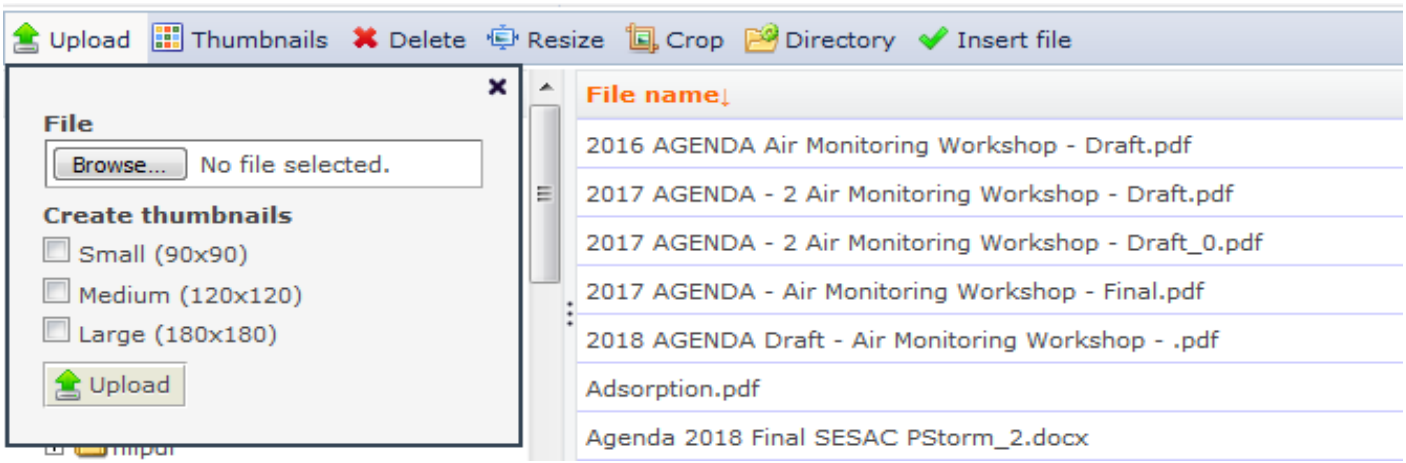


Figure 16: Linking to a file that resides on the server.

(4) *If not,* >Upload *(a smaller File Box will appear)*
(5) >Browse
(6) *Locate the file and > (its name). The file name will replace the 'No file selected.' In the Browse box.*
(7) *>Upload*
(8) *(Once the file is uploaded, >Insert File.*
(9) *Edit the link that you just created for readability.*

FAQ 14. How is a RFP posted on the site.

(1) Log in as an administrator
(2) >>Upper Menu>RFP

(3) >>Page Menu>Edit *(the panel, seen here, will on this next page about half down the page.*

(4) >Browse and locate the RFP document and > (on that document name) and then >Upload.

(5) (It will appear in the upper panel with all the other old RFPs.)

>Save *(at the bottom of the page)*

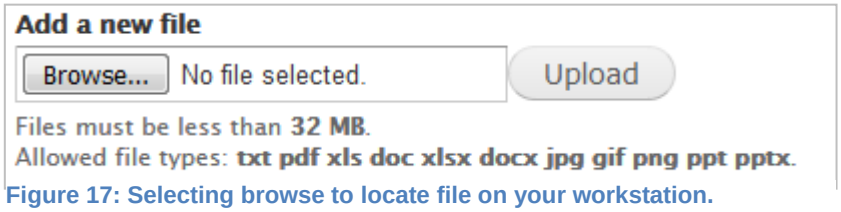


Figure 17: Selecting browse to locate file on your workstation.

FAQ 14. How to upload documents to our website's hidden folder using FTP? (not written yet) ?

Here are the credentials to log into our hidden file using FTP as provide by Michael Watt. This is secret stuff.

- FTP Username: carson@metro4-sesarm.org
- FTP Server: ftp.metro4-sesarm.org
- FTP Port: 21
- password is ftp4SESARM

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