Coordinator Documentation

Overview of Coordinator Modifications

The MAC Tools allow district coordinators to make changes to cost pool and other information. The majority of these changes do not happen immediately, but are added to a list of requested changes for review by the survey administrators. All of these changes can be accepted or rejected by the administrators. The only exceptions to this policy is that coordinators may cancel change requests if they have not already been acted on by an administrator and coordinators updating their own information is immediate, so use care if you change your email address or other information.

- Categories:

  This tool shows you the current list of category codes and names, along with allowing you to view the complete description by clicking the "View Description" button next to the category.

- Preferences:

  From here you can update some of your contact information as well as change your password. Clicking 'Create Password' will generate a random password for you. While much more difficult to guess, these are also nearly impossible to remember and you should probably pick something you can remember easily so you don't have to write it down.

- Employees:

  The purpose of this tool is to allow arbitrary searches and changes to individual employees in the cost pool. It has been restricted to allow only searches on employees in your district. These searches can be saved as either Excel or PDF files by choosing the appropriate file type and clicking "Generate File." Search attributes are specified on the right and those fields left blank will be ignored. Clicking on the checkboxes to the left will include those attributes in the results table in the order indicated. By default, clicking an empty box will insert the next highest number in that place, but this can be changed to whatever you want. When you click outside that box, the order will be recalculated for you. Clicking "View Employees" will return a table of employees in the order you specified showing all the attributes you specified.

- Sample:

This tool is essentially a canned query to the employees tool for all of the employees from your district who have been sampled. The Sample tool lets you request employees be removed from the sample or be scheduled on a specific survey date.

- Survey:

  The Survey shows you the dates your employees have been scheduled to survey as well as how many remain unscheduled. Clicking on a date brings up a page listing all of the employees scheduled on that date and allows you to notify employees individually or all at once of the upcoming survey via email.

- Results:

  The front page of this tool shows you the current status of your surveys: how many people are scheduled to survey from your district, when the surveys are, how many people have taken the survey so far, and the number that have not.

  Clicking on you district name will take you to a page showing all the results in your district, from all survey days. Clicking on an individual date will show you only the results for that survey. You can also click on the numbers under "Scheduled", "Surveyed" and "Remaining" to show you only the employees in that category.

  Viewing the results shows you an overview of the employees results, detailing their FTE, the amount of claimable time they filled out, as well as the total amount of time they entered in the survey. Employees with any claimable time are shown with a green background, those who may have filled out less time than they should have are shown with red text and employees who might have filled out too much of the survey are shown in red, bold text. Results marked like this should be inspected more closely as they might represent bad data of some kind.

  Clicking on an employees name will show you a detailed account of what they filled out in the survey. The menu to the left of their name lets you change which format the data will take. You can view a summary (which shows how much time they spent on each category), details (which shows what they filled out for every time segment) or both. Clicking on the name again will hide the information.

- Claim:

This tool will show you the claim for the current quarter and let you download it in PDF format for printing.

- Training Tools

  This tool will show you a summary of who has been trained, and who hasn't been trained. You can export either list in excel format with this tool.

- Quarter:

  This tool simply allows you to change the quarter you are looking at as well as displaying which quarter you are currently examining. This is useful if you want to look at results or claims for past surveys.

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