GWRRA Rider Education

How to Use the Rider Education Enhanced Database

Created by Betty Knutson
Assistant Intl Director – Rider Education
The Rider Education Program (REP) Database is a tool designed to assist and help the GWRRA Rider Educators, at all levels of the organization, manage and record the Member’s rider education accomplishments and achievements. It is intended to provide:

- Tracking of personal accomplishments and individual achievements for the GWRRA REP Levels Program
- Rapid access to REP Education and Training records
- Individual certification program status
This seminar will cover the following topics associated with the REP Database:

- Who’s information will be stored
- Data entry control and permissions – who can access what
- Database availability
- Database login
- Individual data record access
- Group data access
- Modifying a record
- Instructors
- Reports
- Additional Functions / Utilities
- Differences from Original Database System
- New features
- Future enhancements
- Questions & Answers
Whose Information will be found on the Database?

- Rider Education Program (REP) Database was originally designed to store records of GWRRA Members who participate in the REP Levels Program and/or the High Mileage program.

- The ENHANCED release contains records for ALL members.

- **Non-current member records will NOT display.**
• Data Entry Control and Permissions

➢ **Data integrity** - vital to ensure that accurate data is collected, stored and maintained.

➢ **Why is this important?**
   This data is used to determine individual certifications based upon proven rider education accomplishments.

➢ **How will we minimize data corruption?**
   The ability to modify and manipulate the stored data will be controlled very closely. To do this a “Tiered Access” process has been implemented.
Data Entry Control and Permissions (continued)

“Tiered Access”

- **“View”** access will be given to Chapter Educators so data stored in the database may be used to the maximum extent. REP forms N.7, 9, or 10 will continue to be sent to District Educator to modify a Member’s record.

- **“Edit”** access will be given to Educators at the District, Region and National levels. This will allow the Educators to modify existing records with some minor restrictions. They will also be responsible for maintaining User ID records for their Districts / Regions.

- **“Administrator”** access will be given only to International Program Directors and their Assistants. This information includes everything in the previous level plus Table Maintenance functions, and editing of Instructor certifications that must be earned through specialized training.
Data Entry Control and Permissions (continued)

- **Database Availability**
  - The REP Database will be available to every Educator who has access to the internet. (See Form N.3 MOU – Confidentiality Agreement)
  - Each entity (chapter, district, or region educator position) will be assigned a unique User ID and Password.
  - User IDs (created by the Database Administrator) determine the authorities granted to that position.
  - When the office holder changes, the User ID will remain the same, but the contact information and PASSWORD should be changed.
• Database Login – 2 ways

➢ Go to the “Educators Toolbox” located in the “REP Officer Section” of the GWRRA Rider Education Website. Click on “Rider Education Database” link at the top of the list.

➢ URL: http://re2.gwrrra.org/index.php
Database Login (continued)

Sign in with the User ID and password assigned to you.

Checking this box will cause you to be signed in automatically the next time you access the website.

Click here if you forgot your password.
Forgot Password?

Enter User ID and click submit –

You will be sent an email containing a new password now associated with that User ID.
Main (Home) Menu

- After logging in, you will see the Welcome screen.

- Note that some of the options shown might not be visible based on your access level.
✓ Options available from the Main menu:
   ➢ Member Search
   ➢ Instructor Search / Add
   ➢ Reports
   ➢ Change Password
   ➢ Add / Maintain Users
   ➢ FAQ (Frequently Asked Questions)

✓ Utilities only available to Administrators:
   ➢ Add / Maintain Chapters
   ➢ Add / Maintain FA/CPR
   ➢ Add / Maintain FAQ
   ➢ Class History
   ➢ Welcome Message
Search: Individual Record

Individual data record access:
Members’ data may be accessed several ways:

- Membership number
- Master Tour Rider number
- Member’s Name
- District or Chapter Affiliation
- Combinations may be used
Search: Individual Record

Search by Membership Number
Enter Member number, with %

Note:
% is a wildcard. Using it on the end of a Membership number will automatically bring up all family members associated with that number.
Search: Individual Record

Search by Level IV - Master Tour Rider Number
Search: Individual Record

Search by Name.
Multiple combinations may be used:

✓ First + Last Init
✓ First Init + Last name (With % sign wildcard)
Search: Multiple Records

**Searching by District / Chapter**

After keying or selecting District, use drop down list to select from valid chapters in that district.

Note that when searching this way, **only those members enrolled in the Levels Program** will be displayed!
Search: Multiple Records

Searching by District
Use drop down list to select valid District.
Result: Individual record

Result - showing one individual record that was found as a result of search by member number, master number, or name.
Result: Multiple Records

Result –
Showing multiple records that were found as a result of a wildcard, or District or Chapter search.

Simply scroll down to see results…..
Sort results

Results are initially sorted by Last Name. Click on any column head to resort by that field.

Click again to reverse the sort order.

These sorting options are standard on all query result screens.
Selecting a Record to Modify/View

Details
Click on “View” to see the details of a member’s record.

Depending on your access level, you may be able to update records from the detail screen.
View or Modify a Record
Basic Member Info

Note: GWRRA Membership Expiration Date has been added to this screen.
Basic Member Information

- Exported from Membership Database, updated monthly
- May not be modified in R/E, Member must contact Member Services
- Click on E-Mail Address will open email program
- All CURRENT members available (See Expiration date next to member #)
- Non-current members **not displayed**
- No need to ADD records in R/E
Chapter Information

- Home Chapter originally pulled from Membership Database

- May add or change chapters in R/E

- Member can affiliate with multiple chapters (Snowbirds?)
View or Modify a Record

Add Chapter Information

Pull down lists allow selection of Region, District, Chapter:

- Select valid region,
- Select from districts within that region,
- select from chapters within that district.

Chapter may be left blank.
Add any desired comments (optional).
View or Modify a Record

Rider History (Levels Info)

Hover over “History” to display levels history.

Current Level Status = Current
View or Modify a Record

Rider History (Levels Info)

Display levels history.

Going forward, will show details of each level attained.
View or Modify a Record

Rider History (Add Level)

Add details of each level attained.

Note drop-down list of valid levels, “RET” added.

Comments Optional.
View or Modify a Record
Training Courses History

Training that affects Level Currency is displayed – Hover over “History” to display all Training History records.

Click to Add a history record.
Display of training history records

Note that “Training” includes seminars, riding courses, first aid, etc.
View or Modify a Record
Add Training History
Normally done from Class Rosters

Add a training history record
--
Note the drop down list for valid courses.

"Provider" is only valid for First Aid and CPR classes, as they may be provided by several different entities such as American Red Cross, American Heart Association, etc.
View or Modify a Record
Training Courses History

- Note the drop down list for valid courses.
- Other.
- Courses and classes will be added to the list as needed.
- Comments are optional.
Instructors

“Search for Instructors” allows you to find specific instructors or all instructors in your area.

“Add Instructors” is only available to Administrators.

More to Come
Instructors – Search for Instructors

Instructors’ data may be accessed several ways, similar to Member Search:

- Membership number
- Instructor’s Name
- Region / District Affiliation
- Specific Certification (drop down list available)
- Combinations may be used
- Active Only option
Instructors – Search for Instructors

- Search for Active Seminar Presenters in INDIANA produced this list.
- User your browser’s Print function to print the report.
- Select View to see details, and other certifications for a specific instructor.
This particular Instructor has several certifications.

Click Edit to change (i.e., to extend the expiration date when renewed).

Click Add Certification to add a new certification.
Instructors – Add a certification

(Administrators Only)

- Choose certification from drop down list.

- Enter Instructor number – note the last number used appears in the right-hand column.

- Enter the date issued, expiration date, check Active, comments are optional.

- Click “Insert Certificate”.
Instructors – Add Instructors

Add Instructor brings up the Instructor Search Screen. First determine if the member is already an instructor. Key in member number or name, then select from results.

If member has any instructor certifications, select VIEW. Click ADD for a new certification.
Instructors – Add Instructors

To Add an Instructor, key any comments desired and click Add Instructor.

Once an Instructor has been added, you will be able to select “Add Certificates” for this new instructor.
Instructors – Add Instructors

Add Certification

- Choose certification from drop down list.
- Enter Instructor number – note the last number used in the right-hand column.
- Enter the date issued, expiration date, check Active, comments are optional.
- Click “Insert Certificate”.
Select a valid report from the drop down list. Additional reports will be added to the list as developed.
Reports – Level Information

Levels Deficiencies
FA/CPR Deficiencies

This selection criteria screen will appear for most reports. There may be some minor differences based on user authority.

Note the added sort options, and availability of selecting ALL chapters within a District, which is available only to District/Region Educators.
Standard Reports Selection Criteria:

- Region / District / Chapter
  Available to Chapter Educators,
  Will default to their chapter)

- Region / District / All Chapters
  This option is only available to Region or District Educators and Administrators
Standard Reports Sort Criteria:

- Member Number
- Member Name (Last Name / First Name)
- Level
- Zip Code
- Rider / Co-Rider / Both
Non-Current highlighted in Red.

In this instance, LEVEL is current as there are no course requirements for Level I. However, the FA/CPR Courses are NOT current and may not be used for level advancement.
Note that we have added the Member’s GWRRA membership expiration date.
Reports – Level Information (Results)

Page to see more, or select “View All Records”.

To Print, use your browser’s Print Function AFTER selecting ALL records.
Something NEW has been added!

At the end of the Levels Report is a summary by Level, showing the number of members who are:

- Current,
- Due to expire within 90 days, and
- Already expired.

In this example, there are 2 Grand Master Riders, they are both nearing their expiration date, and there are no expired Grand Masters.

This summary will assist Educators in preparing their monthly / quarterly N.6 reports.
Reports – Level Information (Results)

To Print the Report, use your browser’s Print Function.

Page Setup,
Orientation = Landscape,
Check “Print Background Colors & Images”

Depending on your browser and version, your Page Setup screen may look different
Report #2 – Levels Deficiencies

This report has the same format and information as the Levels report, but only lists those members who are expired or expiring in their level status.

Requirements that have expired are highlighted in red, those approaching expiration are highlighted in yellow.
Report #3 – FA/CPR Deficiencies

This report has similar format and information as the Levels report, but only lists those members whose FA and/or CPR certifications are expired or expiring.

Requirements that have expired are highlighted in red, those approaching expiration are highlighted in yellow.
Report #4 – Educators Levels Info

- Only District and Region Educators may access this report.

- Only Administrators and International Team may view Region Educator information
This report is similar to the standard Levels report with a couple of exceptions.

- The members listed come from the User List instead of the Membership file.
- The “Last Logged In” date allows the District/Region Educator to monitor who is actively using the database.
Additional Functions (Utilities)

- Change Password (Available to ALL Users)
- Add / Maintain Users (District Level and above only)

Administrator Only Functions

- Add / Maintain Chapters
- Add / Maintain FA/CPR Providers
- Add / Maintain FAQ
- Maintain Welcome Message
- Class History (Future Enhancement)
Utilities

Available to View / Edit Users

View – Sees Only Change Password.

Edit – Also Sees User List.
Utilities
Available to Administrators Only

Administrator – Also Sees

Add / Maintain:
• FAQ List
• Chapters
• FA/CPR Providers
• Welcome Message
Additional Functions – Change Password

Select Change Password –

Your current User ID will default.

Enter your current password, then the new password you have selected. Confirm the new password, and click “Update Record”.
Utilities – Add / Maintain Users

Requires Edit Access Level.

Once the User List is Displayed, Choose Edit or Delete.

Use the “Filter” To find a specific user(s).
Utilities – Add / Maintain Users

To find a specific user(s), you may “Filter” any field(s) that have a box in the filter line. Then choose Edit or Delete.

Add New is only available to Administrators.
Utilities – Add / Maintain Users

If an Office Holder has changed –

- Change the Member number to that of the new officer, and tab.
- The name and email address will be retrieved from the member file.
- The email address can be changed if not correct.
- Only Administrator may change the Security Level.
- Use the Active switch to turn on or off access for this User ID.
Additional Functions – Maintain FAQ List

Administrators Only

Once the List is Displayed, Choose Edit or Delete.

Use the “Filter” To find a specific item
Utilities – Maintain FAQ List

Once the List is Displayed –

- Up/Down arrows will move an item within the list.
- Choose Edit or Delete.
- Use the “Filter” to find a specific item.
- Show All Records.
- Add New FAQ.
Utilities – Maintain FAQ List

Modify the question and/or the answer,
Click Update, Or Cancel
Utilities – Maintain Chapters

The Chapter List is Displayed, Use the “Filter” to find a specific Chapter(s), or select “Add New”.

DO NOT DELETE A CHAPTER!
Utilities – Add Chapters

Pull down lists allow selection of Region and District.

- Select valid region,
- Select from districts within that region,
- Key the new chapter,
- Press Add Chapter
Utilities – Maintain FA/CPR Providers

This function will seldom be used, but it is conceivable that there may be more providers of FA/CPR training in the future, and they will need to be added to this table. The function is pretty self-explanatory.
Utilities – Maintain Welcome Message

Self explanatory maintenance program, similar to FAQ maintenance.
Edit or Add message, reorder, make Active/Inactive.

Active Messages here - - - -

- - Display here
Additional Functions – Class History

This function is in development – Check back later
Additional Functions – FAQ

 Displays all of the Frequently Asked Questions

Just scroll through and read
What’s Different from the first DB?

• Based on Membership Data
  ➢ All Current Members
  ➢ Consistency of Member Basic Info

• Standard Reports
  ➢ No more download / manipulate data
  ➢ New reports will be added as needed

• Multiple Transactions – ability to maintain and see history, not just current information
What has been added since the original release in June 2011?

General:
- Show date format (MM/DD/YYYY) everywhere used.
- User List now tied to membership file, name & email retrieved automatically.
- Chapter Maintenance now complete.

Member Information:
- Show membership expiration date on inquiry and report.
- Auto calculate miles/kilometers Safe and High miles.
- Allow District/Region, with No chapter affiliation.
- “Forgot Password” reworked to use User ID instead of email address.
- Ability to RETIRE Level IV.

Instructor Module: **ENTIRE MODULE**
- Search for Instructors – All, Specific certifications, Active only
- Add Instructors – Specific certifications
What has been added since the original release? (Continued)

Reports:

- New Searching & Sorting Criteria added to all reports

- Levels Report –
  - All Chapters (includes members not affiliated with a chapter)
  - Highlight “Level Date” if eligible to move up
  - Show members’ GWRRA expiration date
  - Summary by Level

- New Reports:
  - Levels Deficiency Report
  - FA/CPR Deficiencies Report
  - Educator Levels report – Requires Edit access
  - Region Educators Levels report – Administrators only
Future Enhancements

We are continuously evaluating the system based on feedback from users. The goal is to improve efficiency and ease of use. Features currently being developed and/or considered are:

✓ Batch update for Seminar, Rider Course, MFA class rosters.
✓ Class History reconstruction.
✓ Additional Reports, as requested.
✓ Training from other GW programs – OCP, Horizons, LTP, MEP.
✓ Others?