TraiNet Users Guide

Entering In-Country Training Data

Participants Attending IC Programs

Introduction

This document provides instruction on how to use the Training for Information and Results (TraiNet) reporting system, USAID's internet-based tool for reporting all USAID-funded training programs. This Guide is divided into sections highlighting different common scenarios, with each section explaining what you will need to get started, coupled with step-by-step data entry instructions.

Note: This document is not a policy document. For information concerning USAID policy and requirements related to USAID-sponsored training, please refer to ADS Chapters 252 (http://www.usaid.gov/policy/ads/200/252.pdf) and 253 (http://www.usaid.gov/policy/ads/200/253.pdf). Also note that the Visa Compliance System is not needed for reporting data on USAID-funded in-country training.

Get An Account

To obtain a user account and organizational site ID for TraiNet, you must contact the TraiNet/VCS Helpdesk either by phone at +1.703.879.8611 or by email at trainet-vcs@sraprod.com. You will need to provide your full name, implementing partner/organization, name of the USAID-funded program or project you are implementing, email address, and contact information for your USAID Agreement Officer's Technical Representative (AOTR) or Contracting Office's Technical Representative (COTR).

With this information, the Helpdesk will seek confirmation and approval from your USAID AOTR/COTR that your organization is an active USAID implementing partner and will proceed in creating a site ID for your organization and corresponding user accounts.

Getting Started in TraiNet/Web

This section describes the information you will need, as well as the steps you must take, in order to utilize TraiNet in managing the information for a participant attending a training course in-country.

What You Will Need

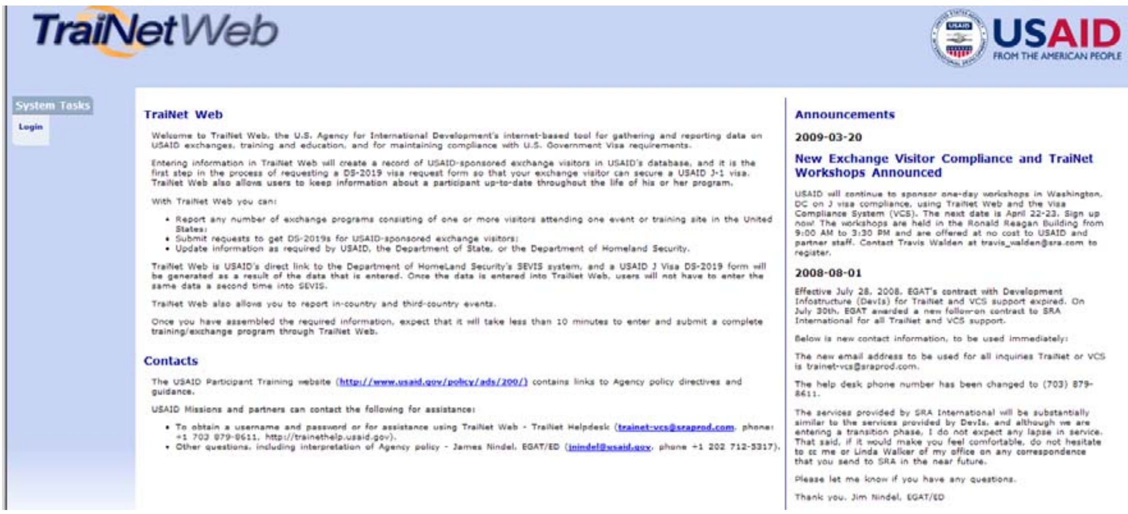
Before you begin entering information about your in-country program, you should have the following information on hand:

- The program name
- The number of males and females who have attended or will attend this training program
- Training provider name and address of the training location;
- The estimated budget for the USAID funded portion of the training program (and actual when known);
- The dates of training;
- The subject/field of training (also known as the field of study); and

It is very important to collect all the above information before you begin entering an actual program and participant information into TraiNet!

Step 1: Logging in to TraiNet

The first screen you will see is the TraiNet/Web **"Welcome"** screen, which provides introductory information about using the system. This screen also includes important dates for TraiNet and VCS training events to be held at USAID in Washington, DC.

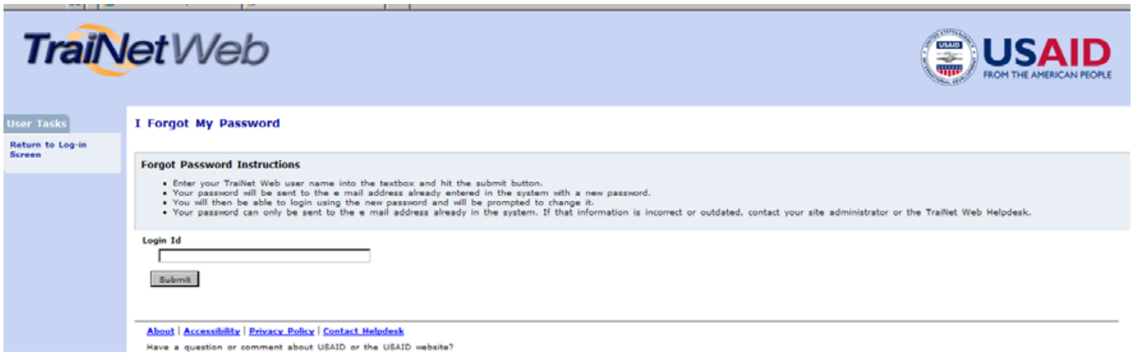


To login into the system, click on the **Login** link located on the left side of the navigation.

Next, enter your case-sensitive **Login ID** and **Password** that were assigned to you (by the TraiNet/VCS Helpdesk) and click on the **Submit** button in order to login into the system.

1.1 Forgotten your Password?

If you have misplaced or forgotten your password, you can always reset your password by selecting the **"I forgot my password"** link located on the left side of the screen. This link will display the following password reset page:



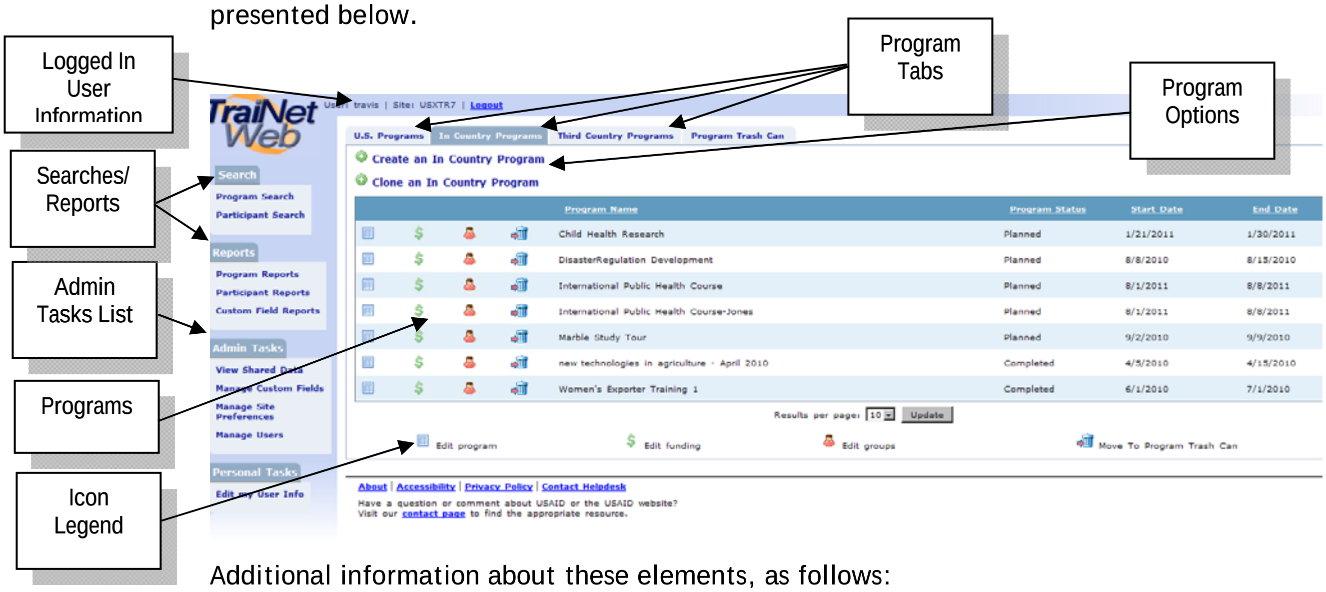
To reset your password, you must first enter your **Login ID** and press the **Submit** button. This will automatically generate a new password that will be sent to your email address. Note: If you do not receive your new password or experience problems with this functionality, contact the TraiNet/VCS Helpdesk for follow up and resolution at email: trainet-vcs@sraprod.com.

1.2 Initial Login Screen

Understanding the TraiNet Web Page Interface

The TraiNet system runs in your internet browser and follows the same navigation logic familiar to web-users. Each of the web pages in the system is structured similarly, and understanding this structure can help you fully utilize all the features of the system.

A sample TraiNet webpage is presented below, with boxes highlighting the important sections of a typical screen. Note: some pages may not contain all the screen elements presented below.



Additional information about these elements, as follows:

Logged In User Information - This area provides information about you (your log-in/user ID) and lists the TraiNet site ID that you have been granted access to. You should contact the help desk if any of this information appears incorrectly in the system. The Help Desk may ask you to provide the information in this area if you are experiencing a problem, particularly if you have access to more than one organizational site ID.

Searches/Reports - This area provides a list of actions that are available for Administrators and Users. Clicking on one of the listed actions will open a new web page and provide instructions on how to complete the selected action.

Icon Legend - This informational area provides a quick reference on the icons that are presented on the web page.

Program Tabs - These links allow you to switch between the different training programs that your organization has entered into TraiNet: in-country, third country, regional, or trainings conducted in the U.S.

Program Options - Selecting one of these links will initiate the type of program specified within the program tab.

Programs - This area provides a listing of all the programs that have been entered in TraiNet. By clicking on a program Icon, a page will display detailed information about the item that you selected.

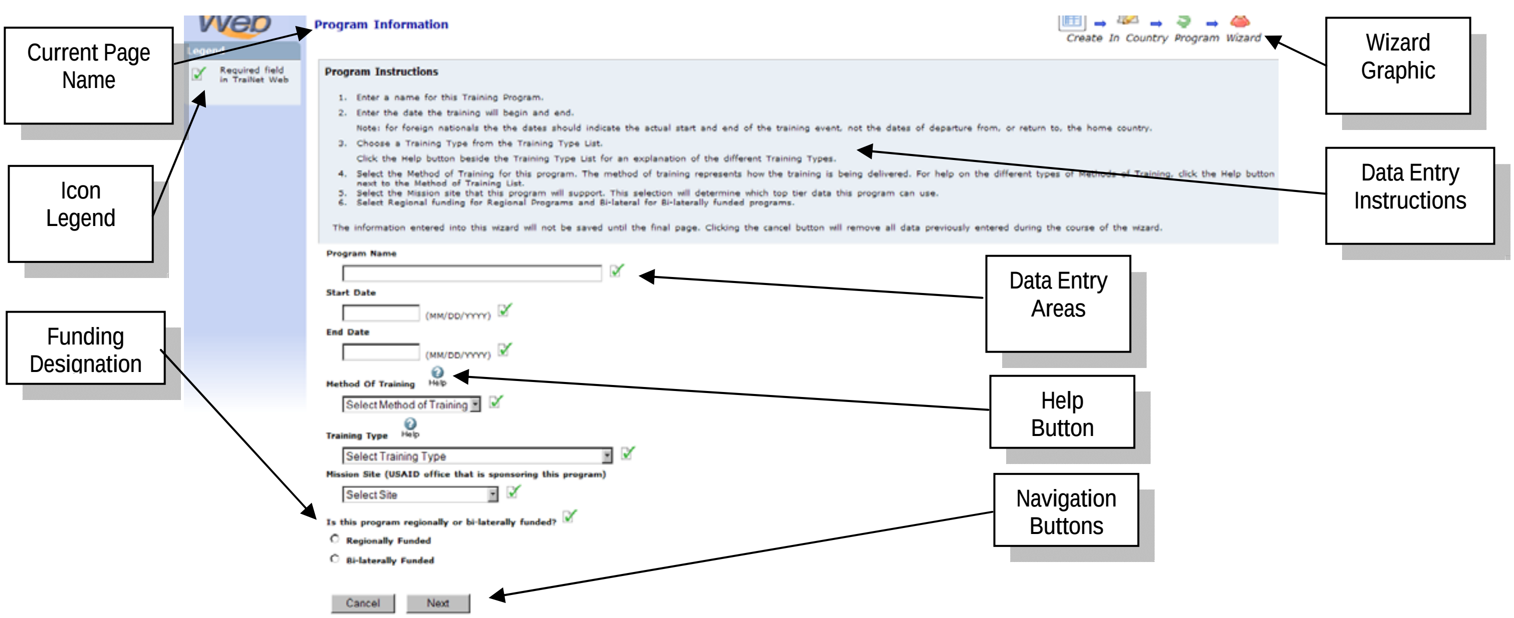
Admin Tasks List - This section is only available to Site Administrators. Selecting a link will create custom fields, view shared data, and manage the site preferences.

Step 2: Creating an In-Country Program

The TraiNet system provides a step-by-step interface to simplify the task of entering data in the system, known as 'wizards'. This provides detailed instructions on the screen about how you will enter program data. Data is saved only when you complete all screens provided; however, you may cancel your session at any time.

Note: the system will "time out" if it is not used in a timely basis. Once the system has logged you off, you will have re-log into TraiNet.

You will need to select the type of program tab that you wish to enter into the system. This guide will provide you information on entering In-Country programs. Third Country and Regional program data entry screens are very similar. Once you have selected the program that you're entering, follow the wizard interface presented below:



TIPS for Creating Programs

Make the Program Name descriptive - Many programs are similar and it will get confusing later if many are listed with similar names. Make the program names reflect either the group being trained or the timeframe in which the training takes place (i.e. "Agriculture Seminar – June, 2010" or "Agriculture Seminar – Ministers of Agriculture"

Training Dates - Training dates should be inclusive of any travel time required to attend the training and not just reflect the actual start date of the seminar, workshop, or other training event.

Learning Method - There are two types of learning "types": Traditional Learning which means training conducted in-person by trainers/facilitators or Distance Learning which is learning conducted on-line or via web such as e-learning.

Funding Source - ALWAYS select Regional funding when regional funds are used for the training.

Additional information on the above sections:

> **Current Page Name -** This identifies the current place you currently working on.
>
> **Icon Legend -** This informational area provides a quick reference to the meaning of the icons that are presented on the web page.
>
> **Wizard Graphic -** This graphical element and text identifies the Icon and area you are currently entering data for.
>
> **Data Entry Instructions -** The area on each page that will provide detailed instructions on how to enter information related to the area you are currently working on.
>
> **Data Entry Areas -** This is the area where your data will be entered according to the instructions provided on the page.
>
> **Help Button -** This button, when selected, will provide further information and instruction.
>
> **Navigation Buttons -** The buttons at the bottom of the screen will allow you to navigate to the next webpage (when the current one is completed) and navigate backward to modify the previous screen, or even to cancel the data entry from this wizard entry.
>
> **Funding Designation -** The funding designation question will allow the user to determine if the correct program choice has been made according to the source of the funding. If the funding choice is incorrect for an In-Country program, you will see this error message: **"In Country and Third Country Programs should not be regionally funded. Please create a regional program if regional funds are used."**

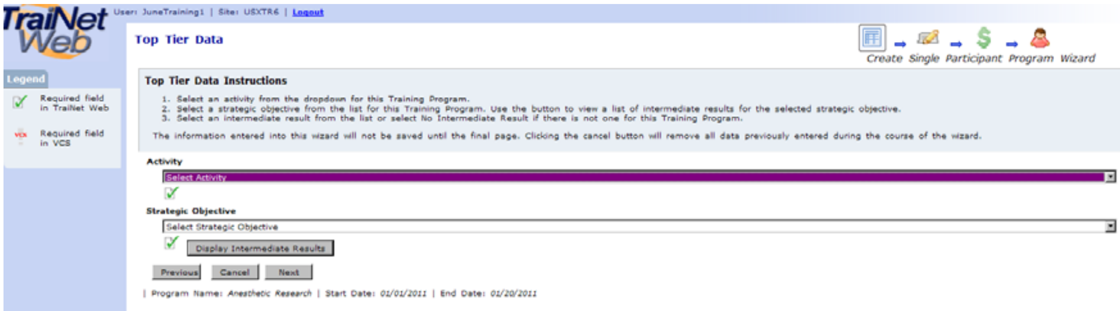
2.1 Understanding Top Tier Data

All projects or programs that are funded by USAID must be associated with the specific USAID Mission/Office or Bureau that is funding the project/program. This is known as Top Tier Data.

When you request a site ID to be created in TraiNet for your USAID-funded program, the Helpdesk will ask you which USAID Mission/Office or Bureau is funding your program so that they can link your organization to the specific USAID Mission/Office or Bureau. The Top Tier Data not only involves linking your organization to the correct USAID funding entity, but also allows you to select the appropriate Activity and Strategic Objective.

Note: There exists an alternate structure to Top Tier Data called the Foreign Assistance Model (FAM) which consists of Program Elements and Sub-elements and this may be used to replace Top Tier Data.

Top Tier Data



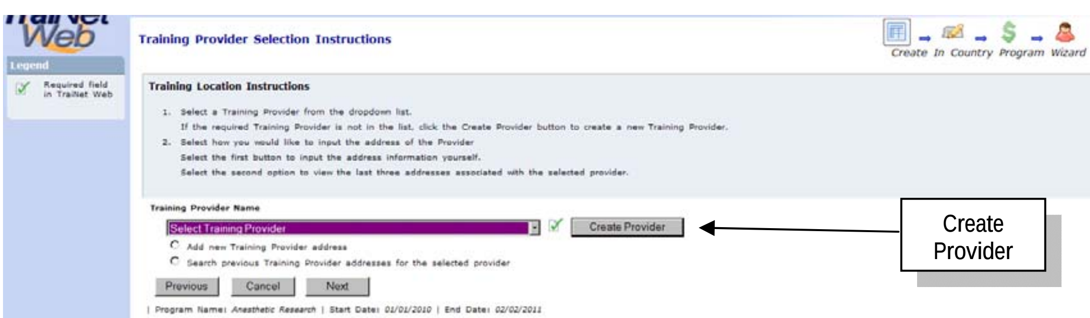
The system will ask you about the **Top Tier Data** and specifically for which **Activity** and **Strategic Objective** you wish to link to your program. Once this action has been completed, select the **Next** button to continue to the next screen. Click the **Cancel** button to remove data entry and close the wizard. Click the **Previous** button to return to the prior screen.

Activity – Select an **Activity** from the dropdown list that fits your program. If your activity or strategic objective is not found, you will need to contact the Helpdesk to get this information added in the system.

Strategic Objective – Select the most appropriate **Strategic Objective** using the dropdown menu.

Display Intermediate Results – Select the button to display any **Intermediate Results** that are associated with the strategic objectives of your program. Note: There may not be any intermediate results associated with the Strategic Objective.

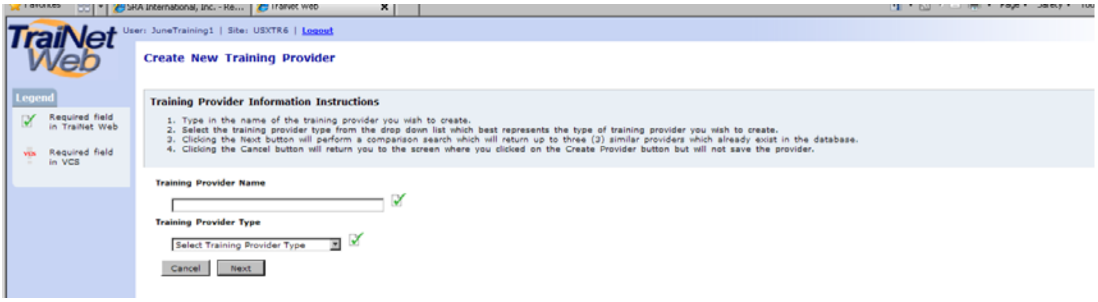
2.2 Training Provider Selection Instructions



The **Training Provider Selection Instructions** screen allows you to enter any training provider you require by selecting from the dropdown list. Once a provider has been selected, you may search for an existing address or add a new address for that provider. If you do NOT see your provider in the list, you can select the **Create Provider** button. Note: All new providers will need to have an address initially entered in TraiNet.

To Create a new Provider if the Provider Does Not Already Exist in the List:

Training Provider Address – Use this dropdown menu to display the list of providers. If the provider is not listed, select the "Create Provider" button to display the next Screen. *If* *you have selected a provider from the existing list, then the next few paragraphs do not apply.*



The **Create New Training Provider** screen is a 40-character field that will allow you to enter in any description for a provider name you wish. Once the information has been entered into the **Training Provider Name**, select the **Training Provider Type** dropdown menu to select the type of provider you are putting in.

Training Provider Name – Enter the name of the entity that is providing the training for your participants.

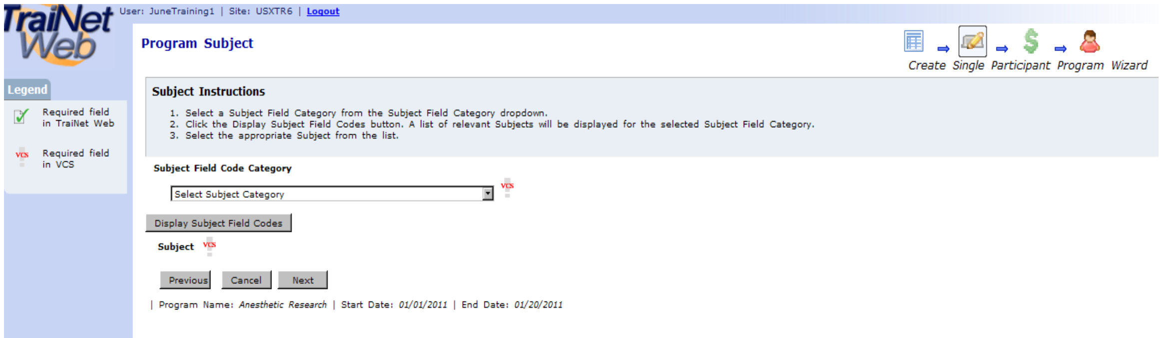
Training Provider Type – Use the dropdown menu to display the list of types that best describe your provider. Select the most appropriate option and then select the **Next** button to go to the **Training Provider Validation** screen.

The **Training Provider Validation** screen allows you to select the provider you just entered and then save this provider to your trainer provider list. Once you select the provider you have just entered, you can then select the **Save Provider** button to go back to the **Training Provider Selection Instructions** screen to add in the address for this provider.

2.3 Program Subject

The **Next** screen will allow you to select the **Subject Field Code Category** by using the dropdown menu. Once you have selected the appropriate category, you can use the **Display Subject Field Codes** button to select the most appropriate code for the training that you are conducting.

Note: Both of these fields are predefined selections that have been approved by USAID and the Department of State and are <u>not</u> subject to change in any way. Simply select the most appropriate code for your program.



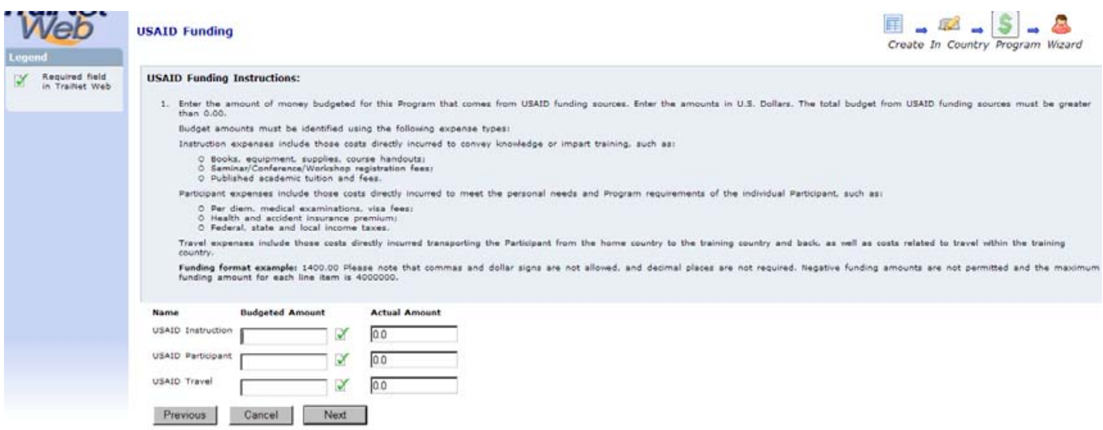
Select the most appropriate **Subject Field Code Category** and then click **Display Subject Field Codes** for your training. Select the one that best applies. Click the **Next** button to continue onto the funding screen.

Subject Field Code Category - Subject Field Codes are arranged in categories. You can select the most appropriate **Subject Field Code** from the dropdown list after you have selected the category. Select the category that is most similar and appropriate to the program that you are implementing.

Display Subject Field Codes – Once the appropriate **Subject Field Code Category** has been entered, selecting the **Display Subject Field Codes** button will allow you to further define the type of training that you are associating the program with. Note: The list used by TraiNet has been revised and adopted by the Department of Education and the State Department and can not be modified. You must choose from options available on this list.

Note: If you are uncertain about which Subject Field Code Category to use, contact your USAID AOTR or COTR for additional clarification. You can also contact the Helpdesk for additional information.

2.4 USAID Funding



This screen will ask you about USAID funding. *Note:* Do not use commas or dollar signs ($) when entering amounts. If and when you know the Actual Amount information, please enter it. Although a USAID funding is required in at least one of the categories, please enter all that apply then continue on to the **Non-USAID Funding** screen, if applicable.

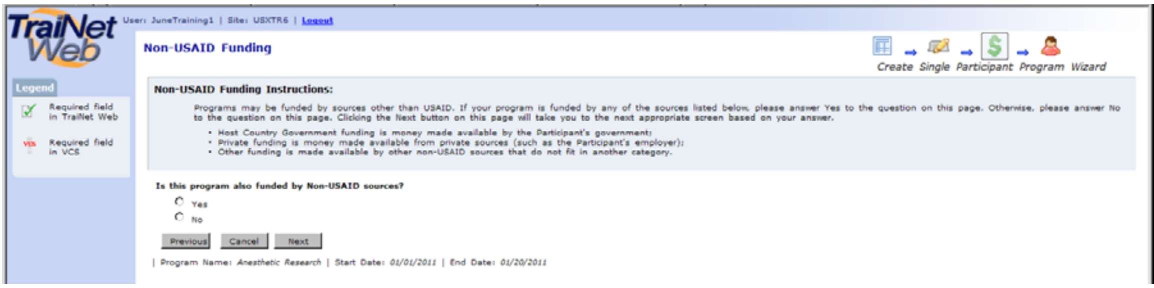
Enter **USAID Funding** Amounts as follows:

USAID Instruction - Enter the USAID-funded amount in US dollars for all costs of instruction, such as an instructor or instruction materials.

USAID Trainee - Enter the USAID-funded amount in US dollars for all costs that meet the personal needs and requirements for the participant such as per diem or insurance costs.

USAID Travel - Enter the USAID-funded amount in US dollars for costs associated with travel related items, such as taxi or airfare.

2.5 Non-USAID Funding



If there are non-USAID funding costs associated with your program you will have to enter this information in TraiNet. Non-USAID funding means if your program is being funded by sources other than **USAID**.

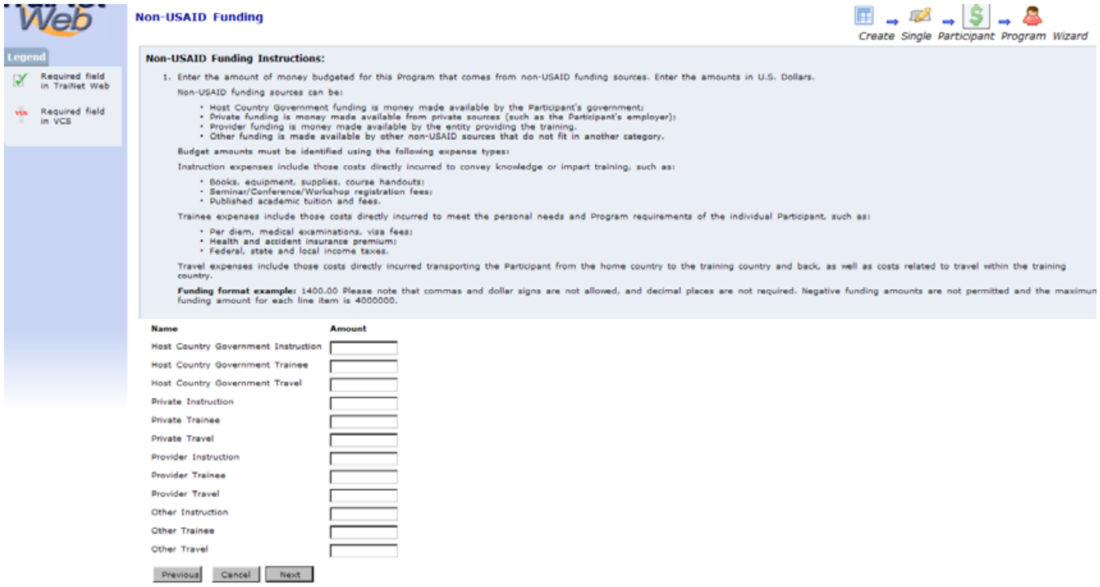
The system will ask the following question: **Is this program funded by Non-USAID sources?** (this may include personal expenses, host government or private contributions). If so, select the option "**Yes"** and follow the below steps that focus on "other" funding sources.

If your program is not being funded by "other sources", select the "**No"** option. This is only when USAID is the sole funding source for the program.

Select **Next** to continue to the screen below, to identify funding details for the Non-USAID sources.

Details for Non-USAID Funding

You will only see this screen if you selected the "**Yes"** option to enter non-USAID funding for the program. This will allow you to enter in the non-USAID funding source details. Note: Do not use commas or dollar signs ($) when entering amounts.



The non-USAID funding options, as follows:

Host Country Government Instruction, Participant, and Travel - Enter the amounts funded in each category by the government of the participant's country.

Private Instruction, Participant, Travel - Enter the amounts funded in each category by private sources, this could be from a charitable organization (Church or Mosque) or private foundation.

Provider Instruction, Participant, and Travel - Enter the amounts funded in each category by provider sources, this could be funding from a University or College.

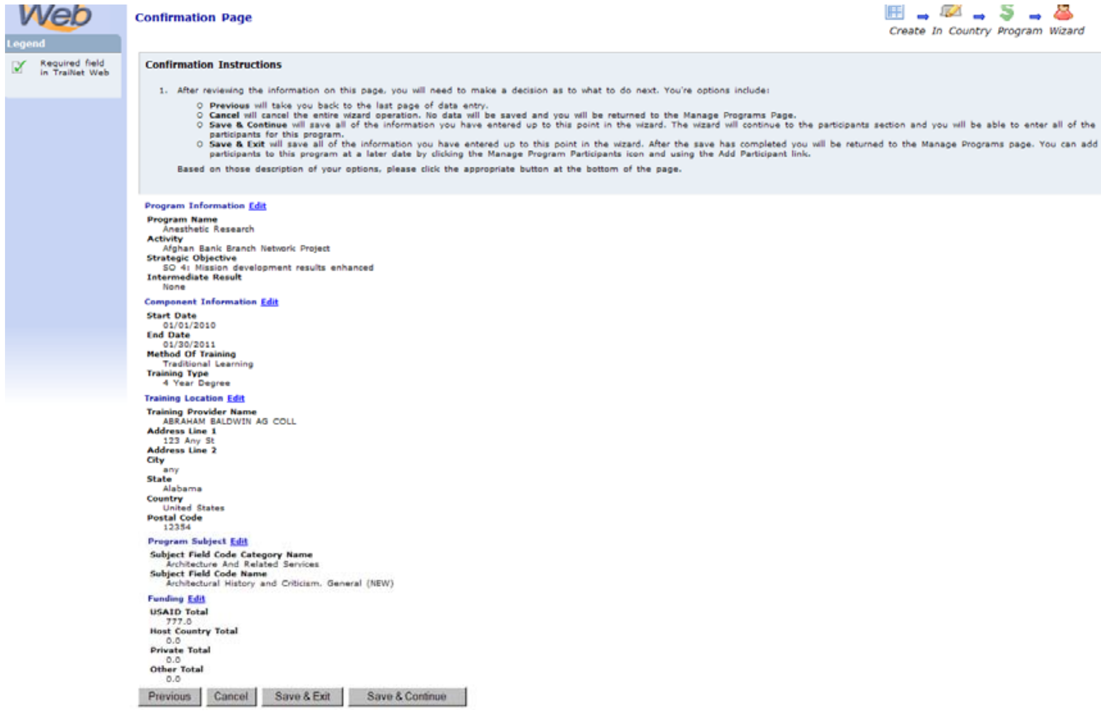
Other Instruction, Participant, Travel - Enter the amounts funded in each category by any sources other than those identified above.

Note: None of these categories are mandatory.

Select the **Next** button to continue to the Confirmation Page screen below.

2.6 Confirmation Page

The Confirmation Page allows the user to review the information entered and gives the ability to modify any information before entering the **Group Biographical Page**.



Note: By selecting any of the "Edit" links next to the listed section, you will return to that part of the process and will be allowed to modify the information that was previously entered. You will need to save the program data in order to continue along in the system.

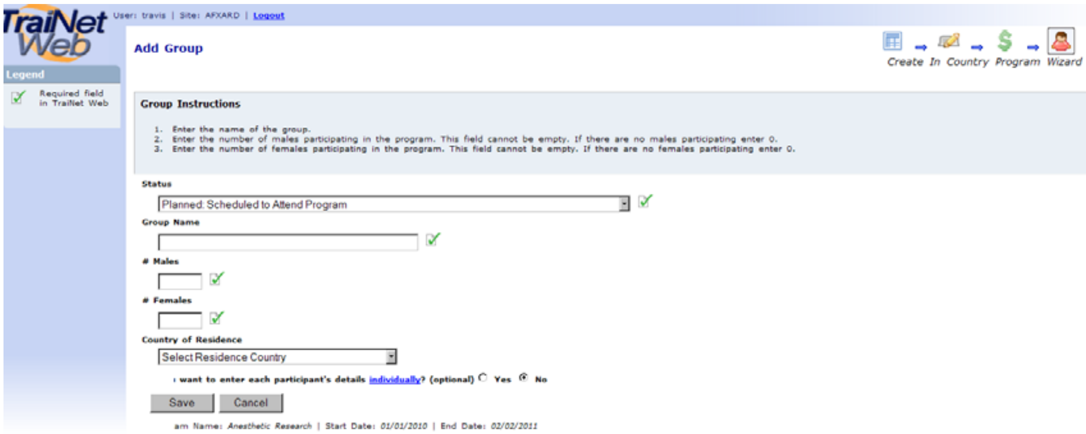
Step 3 - Manage Participants

The Manage Participant screen is used to create groups for the program information entered.

Selecting the **Create a Group** option will allow you to add information regarding the number of males and females in the group. If you wish to enter detailed participant-level information you can do so via an option provided to you on the screen. You may create as many groups/participants as necessary.

3.1 Add Group Data

The **Add Group** screen allows you to enter information about the participants undertaking the Regional training.



Note: Individual participant information can be entered for In-Country Programs by creating a group and then editing the individual participants, detailed below. *In-Country programs track group participant numbers; therefore specific information on specific participant is not mandatory and all that is needed is the gender breakdown per training program.*

Status - In-Country programs may be entered either before or after the training has occurred. This means that completed programs can be entered with an **Achieved** status by using the pull-down status menu. However, it is extremely important that you remember to include all USAID-funded in-country training for reporting purposes. If you are entering the training before it occurs, please remember to go back later and change the status as appropriate to "achieved", "cancelled" or any of the other statuses in order to properly record the event.

Group Name – This is a 40 character open field that allows the user to describe the group. It is recommended that you create a group name that differentiates the group from the rest of the other groups in trainings conducted by your implementing organization. The Group Name is an open field, and should describe the name of the group participating in the program.

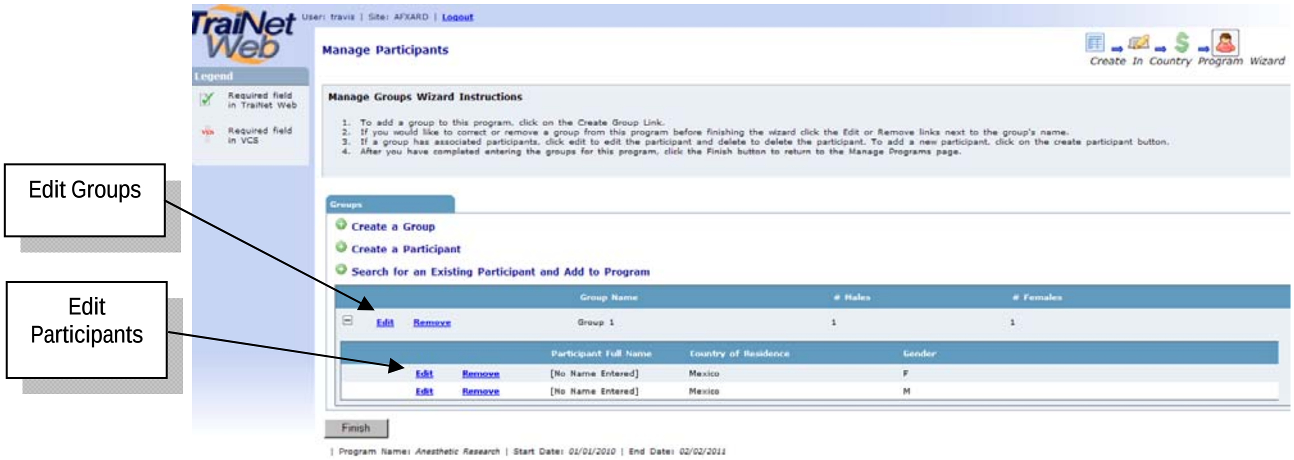
# of Males / # of Females – In-Country programs track the number of males and females who attended the program. Enter in the number for each gender.

Country of Residence – Select the country of residence for your participants. Note: As this is an In-Country program, the participant's country of residence should match the country where training has taken place.

Enter Participant Details Individually? – This question will allow the R1 user to choose to enter specific details regarding the participants, if it is known or requested by the Mission or COTR for the project. This option is not mandatory.

3.2 Add Group Data – Participant Level (optional)

Once the **Group** screen has been filled, the system will prompt the user for additional entry of specific participant information for as many as need to be entered.



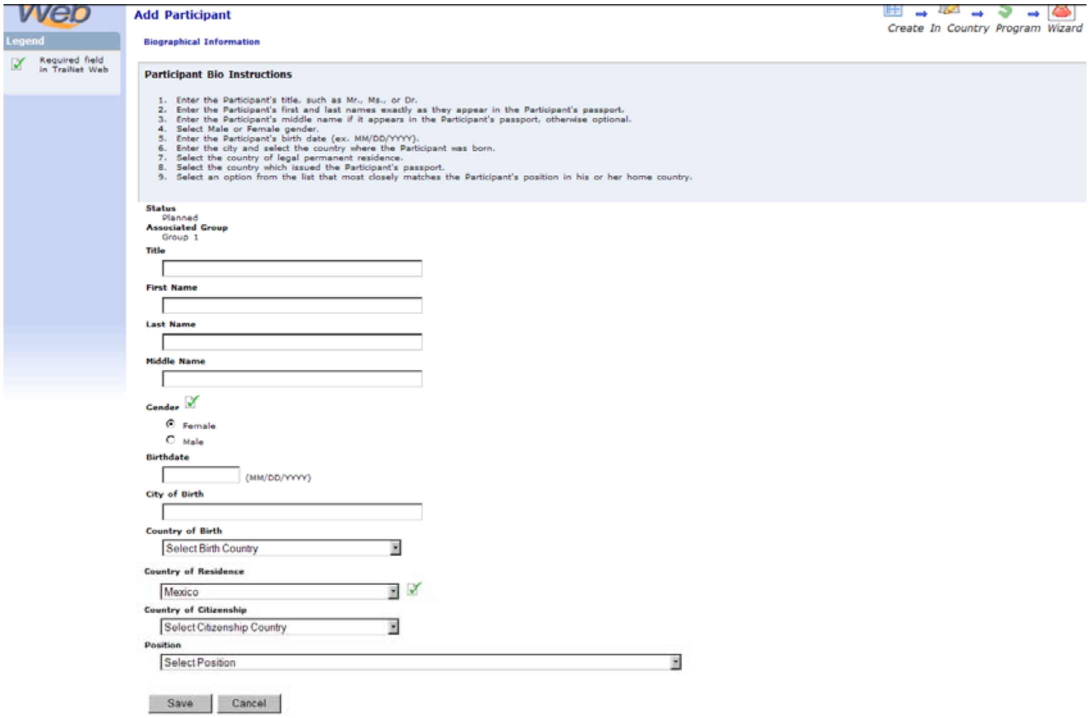
This screen will now allow the user to enter in individual participant information by selecting the appropriate **'Edit'** link located on the participant's individual line. The user can also edit the group information by selecting the **'Edit'** command on the group name line. Selecting one of the **'Edit'** commands will move the user to the '**Add Participant'** screen below. *Note: Adding specific participant information is not mandatory for in-country training and is optional.*

Create a Participant – Selecting this option will allow the R1 user to add new participants under an existing group. Note that in the participant biographical screen the R1 will need to select the group that the new participant is part of, so a pre-existing group must have been entered for the participant.

Search for an Existing Participant and Add to Program – This option will enable the R1 user to add any participants that have already been previously entered into the In-Country tab. Once the participant has been found, the user will be able to select the entry and add this participant without having to enter the biographical information.

3.3 Participant Biographical Information

The **Add Participant** biographical screen allows you how to enter biographical information about any participants that are included in your group if you have chosen to do so in the previous screen.



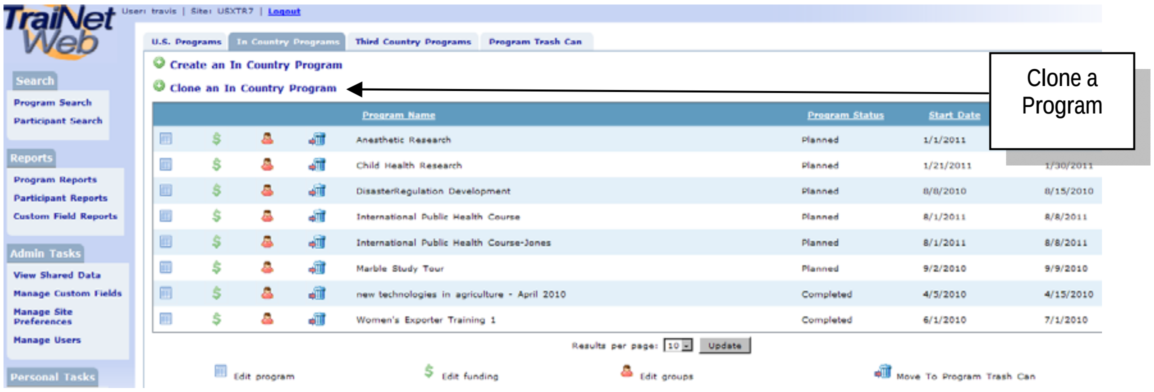
This screen will allow participant information for In-Country programs to be entered. Individual participant information is entered as the above screen shot shows. This screen will not save information until the **"Save"** option has been selected.

Status, Associated Group, Title, First Name, Last Name, Middle Name, Gender, Birthdate, City of Birth - In-Country programs may be entered either before or after the training has occurred. This means that completed programs can be entered with an **Achieved** status by selecting the **Status** option appropriately. Other data fields are entered normally, some following the entry example displayed, such as the Date of birth.

Country of Birth, Country of Residence, Country of Citizenship, Position – Select each information category by using the participant's passport. Position information should be selected using the category most closely resembling the participant position that is currently occupied.

Note: Once you have selected the **'Save'** or **'Cancel'** option, the screen will return to the **Manage Participants** screen in the section above, until the 'Finish' button on that screen has been selected.

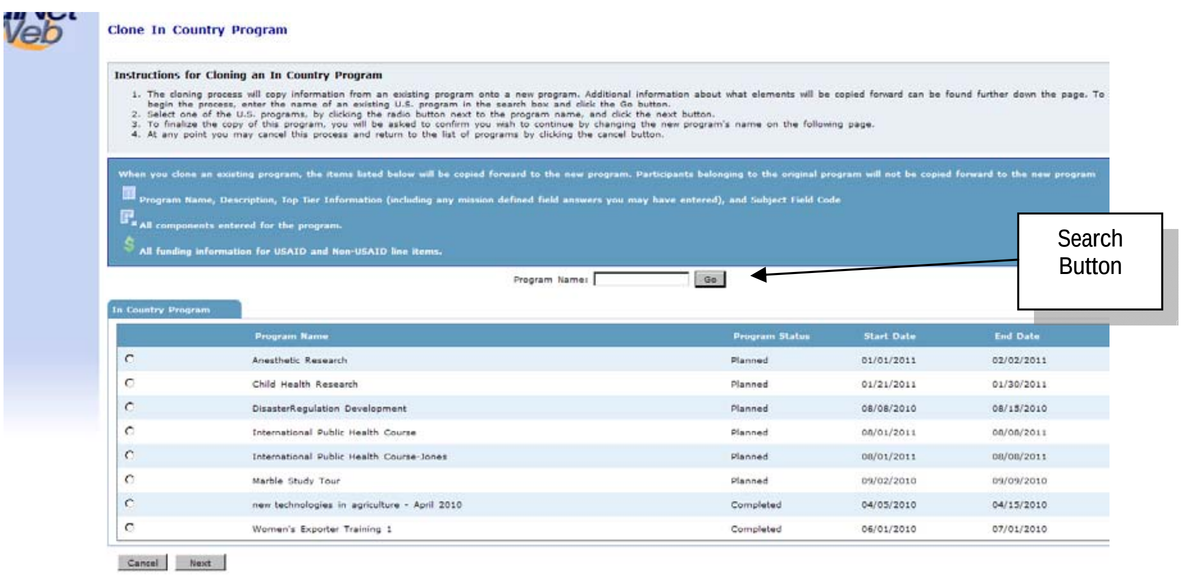
Additional Tips: Cloning an In-Country Program



TraiNet provides the option to clone a program that has already been entered. This option will save the user time and effort by producing an exact replica of the original program.

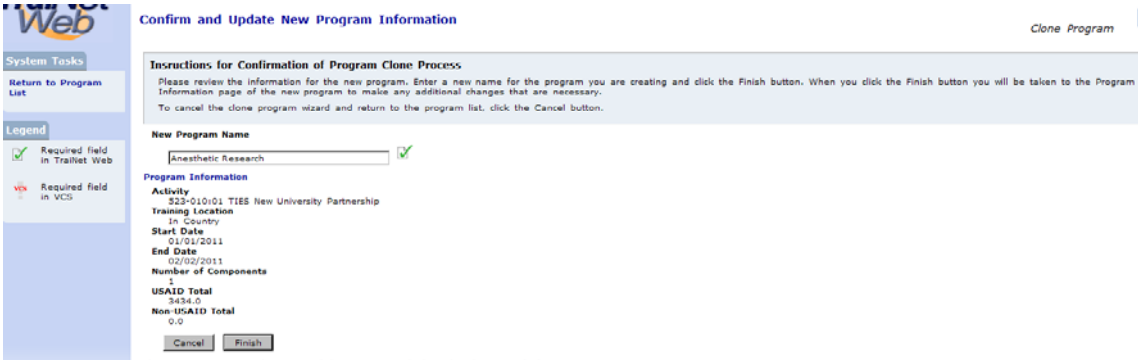
Note: The cloned program will NEVER clone participant or group information for any type of program. Begin this process by selecting the **Clone an In-Country Program** option and once you have selected this follow the sample wizard interface presented below:

1. Choose an In-Country Program to Clone



This feature will allow the user to clone any program that was previously entered. This can be accomplished by entering the program name in the box next to the **GO** button **.** If the program name is not known, the user can also select the **GO** button which will produce a list of all program names within the **In-Country** programs tab. The user will need to select the program to be cloned, and then select the **"Next"** button to continue.

2. Confirm and Update the New Program



The **Confirm and Update New Program Information** screen displays the program information for the program being cloned. Note: The name in the data entry box is always the same as the original program that is being cloned; therefore you will have to change the name to help distinguish between the new cloned program and the previous program.

New Program Name The program information page will be displayed for the program being cloned. This information *should* be changed, once the program has been cloned, by entering into the program and then selecting the appropriate tab and edit link. Remember to change the name of your new program to something different that the original program, and it's a good idea for the program name to reflect either the time in which it took place or the group it trains. This will save time trying to distinguish between the new and old programs. Once the name has been changed, select the **Finish** button to move into the new program. The user will be in the Program Information tab of the program.