TraiNet Users Guide

Entering Regional Training Data

Participants Attending Regional 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 Regional 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 regionally funded training event, and not in the US.

What You Will Need

Before you begin to enter information about the Regional 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

<u>If desired or requested by the Mission or COTR:</u>

Individual details regarding participants such as name, birth date, country of birth, residence, citizenship, and position, passport number, and employment sector.

It is very important to collect all the above information before to begin entering in 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 the USAID offices 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 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. 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.
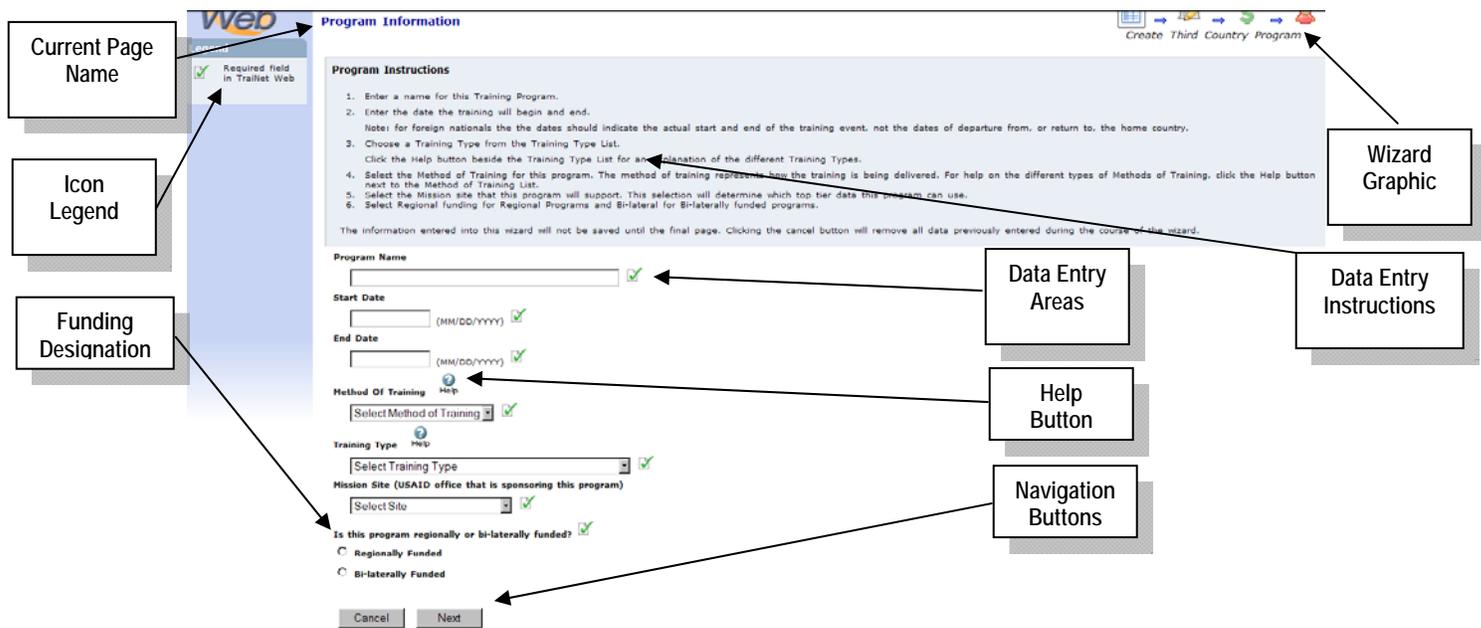
Admin Tasks List – This section is only available to Site Administrators. Selecting a link will create custom fields, view shared data, and manage the site preferences.

Step 2: Creating a Regional Program

The TraiNet/Web system provides a step-by-step interface to simplify the task of entering data in the system, known as wizards. This organizes the task of entering data into logical subsets, and 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 Regional Country programs. Third Country and In-Country data entry screens are very similar. Once you have selected the program that you're entering, follow the wizard interface presented below:

Current Page Name

Icon Legend

Funding Designation

web

Program Information

Required field in TraiNet Web

Program Instructions

1. Enter a name for this Training Program.
2. Enter the date the training will begin and end.
   Note: for foreign nationals the the dates should indicate the actual start and end of the training event, not the dates of departure from, or return to, the home country.
3. Choose a Training Type from the Training Type List.
   Click the Help button beside the Training Type List for an explanation of the different Training Types.
4. Select the Method of Training for this program. The method of training represents how the training is being delivered. For help on the different types of Methods of Training, click the Help button next to the Method of Training List.
5. Select the Mission site that this program will support. This selection will determine which top tier data this program can use.
6. Select Regional funding for Regional Programs and Bi-laterally for Bi-laterally funded programs.

The information entered into this wizard will not be saved until the final page. Clicking the cancel button will remove all data previously entered during the course of the wizard.

Program Name

Start Date
(MM/DD/YYYY)

End Date
(MM/DD/YYYY)

Method Of Training
Help
Select Method of Training

Training Type
Help
Select Training Type

Mission Site (USAID office that is sponsoring this program)
Select Site

Is this program regionally or bi-laterally funded?
○ Regionally Funded
○ Bi-laterally Funded

Cancel   Next

Create Third Country Program

Wizard Graphic

Data Entry Instructions

Data Entry Areas

Help Button

Navigation Buttons

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 is the specific point of the wizard that you are 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 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.

Help Button – This button, when selected, will give further information and instruction.

Navigation Buttons – The buttons at the bottom of the screen will allow you to navigate to the next web page when the current one is complete or navigate backward to modify the previous screen, or even to cancel all 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 a Regional program, you will see this error message:** "Regional Programs should not be bi-laterally funded. Please create an In Country or Third Country program for bi-laterally funded programs."

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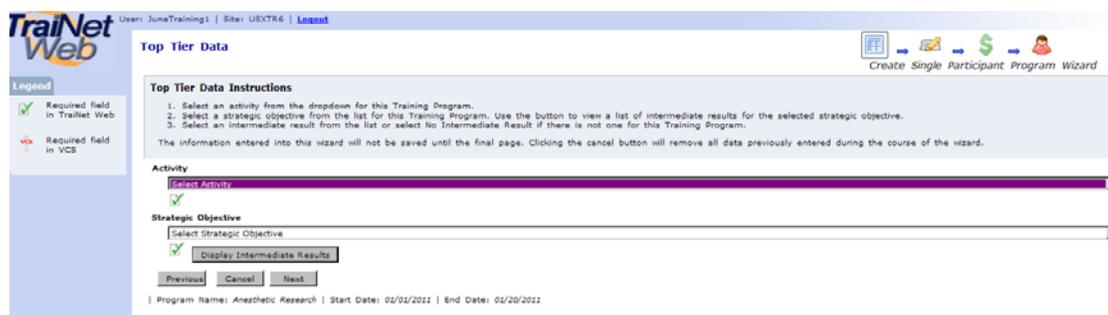
The system will ask you about the **Top Tier Data** and specifically for which **Activity** and **Strategic Objective** you wish to link to your program. Once this action has been completed, select the **Next** button to continue to the next screen. Click the **Cancel** button to remove data entry and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

Strategic Objective – Select the most appropriate Strategic Objective using the list displayed by 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 drop-down menu. Once a provider has been selected, you may <u>search for an existing address</u> or add a new address for that provider. If you do NOT see your provider in the list, then select the **Create Provider** button. You may Note: All new providers will need to have an address initially entered in TraiNet.

<u>To Create a new Provider if the Provider Does Not Already Exist in the List:</u>

Training Provider Address – Use this drop-down 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** from the drop-down menu to select the type of provider you are putting in.

Training Provider Name – Open data area used to 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 training 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

This screen will allow you to select the most appropriate **Subject Field Code Category** by using the drop-down menu. Once you have made your selection, you can use the **Display Subject Field Codes** button to narrow the selection of the most appropriate code for the training that you are conducting. Note: Both of these fields are predefined selections approved by USAID and are not 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

This screen will seek information about non-USAID funding costs, for example if the training is funded by sources other than **USAID**.

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 there your program is not being funded by "other sources", select the "**No**" option. This is only if 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 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 one 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.

Program Information, **Component Information**, **Training Location**, **Program Subject**, **Funding** - *Note:* Each section will display information entered as the User proceeded through the wizard. Selecting any of the "Edit" commands next to the headers will allow the user to readjust that information. If the program is cancelled, or is not saved (**Save & Exit**, **Save & Continue**), all information will be lost.

Save & Exit – This button will allow the user to save the program information entered, but will not continue on to the Manage Participant page below.

Save & Continue – This button will allow the user to save the program information entered for the program, and will continue on to the Manage Participant page.

Step 3 - Manage Participants (Regional Program)

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

Note: 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.

Create a Group - This button will create the group biographical information that will be necessary to identify participant participation for this program. All participants entered will be listed under the "**Create a Group**" button, in their group.

3.1 Add Group Data (Regional Program)

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

Note: Group information is entered for the Regional program. This tracks group information, and information is not saved until the "**Save**" option has been selected:

Status- Regional 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.

 # Males / # Females – These data boxes should be entered as to how many males and females have, or will, experience the training.

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.

Once the first Group Biographical screen has been filled, this will be the screen that the system returns the users to. This will allow for the additional entry of group biographical information for as many groups that need to be entered, as well as any individual biographical page entries.

Note: This screen will also 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 participant **'Edit'** commands will move the user to the next screen. *Note: Adding specific participant information is not mandatory for Regional 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 Third 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 (Regional Program)

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.

TraiNet Web

Add Participant

Biographical Information

Legend

☑ Required field in TraiNet Web

Create Regional Program

Participant Bio Instructions

1. Enter the Participant's title, such as Mr., Ms., or Dr.
2. Enter the Participant's first and last names exactly as they appear in the Participant's passport.
3. Enter the Participant's middle name if it appears in the Participant's passport, otherwise optional.
4. Select Male or Female gender.
5. Enter the Participant's birth date (ex. MM/DD/YYYY).
6. Enter the city and select the country where the Participant was born.
7. Select the country of legal permanent residence.
8. Select the country which issued the Participant's passport.
9. Select an option from the list that most closely matches the Participant's position in his or her home country.
10. Enter the Participant's Insurance Id.
11. Indicate whether or not this Participant has Health and Accident Coverage (HAC).
12. Enter the Participant's employer.
13. Select the Employment Sector that corresponds with the Participant's employer.
14. Enter the Participant's complete passport number.

Status
Planned

Associated Group
Group 1

Title

First Name

Last Name

Middle Name

Gender ☑
  ◉ Female
  ○ Male

Birthdate
[   ] (MM/DD/YYYY)

City of Birth

Country of Birth
[Select Birth Country ▼]

Country of Residence
[Select Residence Country ▼] ☑

Country of Citizenship
[Select Citizenship Country ▼]

Position
[Select Position ▼]

Employment Sector
[Select Employment Sector ▼] ☑

Visa Information

Passport or National Identity Card

[Save] [Cancel]

Note: This is an area where the Regional entry information differs slightly from the In Country and Third Country information entered. Individual participant information is entered for Regional Programs the same as In Country and Third Country program, with the exception of the added fields noted below. The programs track participant information, and information is not saved until the **"Save"** option has been selected:

Status, Title, First Name, Last Name, Middle Name, Gender, Birthdate, City of Birth - *Note:* Regional programs may be entered either before or after the training has occurred. This means that programs finished can be entered with an Achieved status by setting the Status option appropriately. Other data fields are entered normally, following any guide displayed, such as the Date of birth.

Country of Birth, Country of Residence, Country of Citizenship, Position, Employment Sector – Enter each piece of information as requested, if desired. Note that Group, gender, and Country of Residence must be filled in if you have chosen to populate at the individual detailed level. Position information should be selected by using the category that most closely resembles the position that the participant currently occupies.

Visa Information – Note that the user will have to enter the participant passport information for participants who attend regional training events.

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 is selected.

Additional Tips: Cloning a Regional Program

Clone a 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 a Regional Country Program** option. Once you have selected it, follow the sample wizard interface presented below:

1.   Choose Regional Program to Clone

Search Button

This feature will allow the user to clone any program that was previously entered. This can be accomplished by entering in 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 Regional 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.