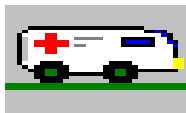
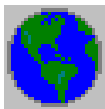


DCN: CHERS-162.STDX-100.doc
May 15, 2000

Student Exercises



Human Resources

Exercise 1: Volunteer Application / Add Person

1. Add a new person to the CHERS database using the following information.
 - John V. Smith lives at 202 St Charles Avenue and works at 450 Canal Street. Both addresses are in New Orleans at a 70112 zip code. His home phone is 504-455-6767 and his work number is 928-3333. He is a white male who speaks fluent French and Spanish. For an emergency contact he has named his wife Betty whose work number is 945-3466. His branch will be headquarters.
2. Add yourself into the CHERS people database. Use a fake New Orleans address and zip (70000 range).
3. Perform a wildcard search on people's Last Names:
 - smi* -- finds Smith, Smiley, Smirnoff
 - *son -- finds Johnson, Davidson, Son
 - *ber* -- finds Berry, Robertson, Gerber

Entering People Who Are Also Students

Clarification of “Align Students to HR People”

When FIRST entering a PERSON in HR-- while in the FIND screen--check to see if the person is in HRPEOPLE. Next, check to see if the person has an EDSTUDENT record by clicking on SEARCH STUDENT RECORDS.

If no records are found enter the person in the HR\ VOLUNTEER APPLICATION\ADD PERSON screen.

If the person has an EDSTUDENT record, simply click on COPY STUDENT TO HR and this will copy all information into a new HRPEOPLE file for you and will JOIN both the HR and ED record.

When entering a STUDENT in ED--while in the FIND STUDENT screen check to see if the person has a STUDENT record. If they do not, click on ADD. Next, click on the

Student Exercises

PERSON ID ellipsis button and check to see if the person has an HRPEOPLE record.

If no records are found, enter the student in ENROLL STUDENT or make a STUDENT RECORD.

If the student does have an HR record, simply click on OK while you are still in the FIND PERSON screen and the HR ID will be displayed in the new STUDENT record.

If this process is not followed, the end result is the two records are not “tied” together and the ALIGN STUDENTS TO HR PEOPLE function will not work. Additionally, EDSTUDENT records will not show up on the person’s HRPROFILE. You can fix this in ACCESS 2.0 by going to the EDPROG and adding the STUDENT ID to the person’s HRPEOPLE record. Any training completed before you correct this WILL NOT show up on the person’s HRPROFILE.

The ALIGN STUDENTS TO HRPEOPLE function will update STUDENT records so current address information for volunteers/paid staff needs to be updated in HR not in ED.

Human Resources

Exercise 2: Adding more information to a person's record. Creating a volunteer

1. Use the Find Person screen to retrieve John Smith. Using the pop down menu options, choose the correct screen and add the following information to his record.
2. Add a two-line business address: Rothko Industries, 35 Canal St, New Orleans, LA, 70112. Add a business phone of 504 667 1800. Enter a preferred name of Jack. (Hint: Using the copy and paste feature works well here.)
3. Give him the non-expired Volunteer Jobs of an Available Volunteer and a Driver with department and line of service of Disaster. Credit him with 25 hours as a Driver worked in April of this year. Jack has been with the Red Cross since 1989. Give him the appropriate number of Total Years. One of his awards is the Disaster Service Award.
4. Jack has two favorite functions in Disaster: He is a Damage Assessment Assistant Officer and he is a Disaster Computer Operations Coordinator.
5. Jack signed the Code of Conduct for Red Cross staff on January 5, 1989. His birth date is April 9, 1949. His spouse's name is Betty.
6. Jack wants to be included on all Fund Raising and Disaster mailings.
7. Correct the spelling on Aaron Robertson's last name (Robertson).
8. Add more information to the record which you added using your own name.

Human Resources

Exercise 3: Event and Event Roster

1. Enter the following information using the Menu Option Events:
 - Red Cross Day at Pontchartrain Beach Amusement Park
 - One-day event on March 3, 1999 from 9am to 4pm.
 - This is a fundraiser.
 - It is sponsored and organized by the department Administration, branch is Headquarters.
 - A contact phone for more information is (504) 555 4444.
2. In the Event Roster window, enter data about the following people who have volunteered to work the event and should be registered:
 - Janine Gerber for job “DR”
 - Sue Davidson for job “AV”
 - Alex Smirnoff for job “AV”
 - Louie Son for job “AV”
3. Save and Close roster and event.
4. Return to the event.
5. 4500 people showed up at the park and Red Cross talked to 300 of them at their booth. The event raised \$23,000.
6. Go to the roster.
7. Hours worked: Janine 10, Sue 8, Alex 8. Credit them with these hours. (Dr. Louie Son had an emergency and could not work.)
8. “Post Hours.”
9. Review your volunteers' Event Job History window. Review also their Hours & Years screen.

Human Resources

Exercise 4: Human Resources Reports

1. Choose to send these reports to the Screen. After viewing on the Screen you may then send the report to the printer. (Make sure that you are attached to a printer before ever sending a report to the printer!)

2. Volunteers by Ethnic Category
Enter the date range of 07/01/98 to 06/30/99
Write the number of Total Volunteers _____

3. Volunteer Monthly Hours
Write the total number of March hours _____

4. Volunteers With No Active VJOBS:

One report shows those with expired vjobs. The other shows people who have never been issued a volunteer job.

Notice that Janine Gerber's name appears on the report, "People with No Job Records." Return to Janine Gerber's record and give her a non-expired Volunteer Job. Remember that Janine would not have been counted on the Annual Report if she had not received at least one Volunteer Job.

5. Event Roster
 - a. This is a handy report to use before and during an event. Note that the phone number appears allowing you to quickly phone your registered volunteers.

Human Resources

Exercise 5: Human Resources Management

1. Update Volunteer's Hours feature. Use this window to credit hours to a few of those with volunteer jobs in the Disaster department.
2. Consolidate Hours
 - View the Hours & Years record of Susan Davidson. Add to her hours record that she volunteered 20 hours in May 1998 and 30 hours in June 1998. Make a special note of the hours, months, and job types in her grid.
 - Run Consolidate Hours for the year 1998.
 - Return to the Hours & Years record of Susan and note the difference.
3. Take a preview look at the Student file in the Education Module. Retrieve the record of Jon Smith. Note his street address. Return to the HR module and copy Jon Smith's Student Record to HR. In HR Address and Phones, change his address to 2400 Maroon St.
4. Run the Management feature of Align Students to HR People. Return to Smith's student file to see the update.

Mailing

Exercise 6: Mailing and Ad Hoc Reports

1. Learn what the “Must meet all criteria?” button actually does. Go to the Mailing module, Mailing menu option, People.
 - a) Click the button, Screen. Now click the button, Run. You'll get a “Mailing List” box which tells you how many records were found. In this case all of your people records. Click “No” to return to the People Mailing screens. (If you already sent this report to the screen, double click the Control Bar in the top left of the report window.)
 - b) Click the General page and choose Registered Nurse (RN) for Licenses and French for Languages. Click Run and note how many records were found -- no need to see the report.
 - c) Returning to the People Mailing screen, click the box, “Must meet all criteria?” Press Run. Note that the number of records found is fewer than before.

2. More practice
 - a) On the screen, view a report of all those people who have a Disaster Function of Family Service.
 - b) Advanced puzzler: View a report of all those who have a Disaster Function / Position of Family Service Officer or Assistant Officer.

Additional Exercises

Human Resources: Joint Mailing

1. Choose **two** people in the HR people file, then go to addresses and phones and choose the tab **Mailing Information for each record**.
 - Enter the same mailing code for each person
2. *Click on Add People to Related Mailing*
 - Find and select each of the people you want to join from above
 - Tag one of the records as the joint mailing master
 - Enter a joint mailing title
 - Click on Save
3. Go to the Mailing Module, select People, click in the joint mailing box and print to the screen. Under the General tab, select records by the mailing code **group** you selected for the above records. Run the report.

Additional Exercises

Mailing: Mail Merge

1. Develop a mailing template titled, "All Active Volunteers".
 - Check "Must Meet All Criteria" and pick the save to file option.
 - Name the file **acvol** (if you are using Word Perfect, name the file **acvol.txt**)
2. Choose all volunteer jobs (under jobs/instructors) and check the active box.
3. Run the report.
4. Check your file and perform a mail merge using the CHERS on-line help instructions or the Microsoft Word instructions on the following page.

Mailing

Creating Labels From CHERS Using Microsoft Word

To create a merge in Microsoft Word, you need two files - a data file which you create in CHERS using the Mailing module - and a form file you create in Word. CHERS will create a file named C:\mtemp.txt. Change the file extension (txt) to **doc** or simply leave it off.

1. Select **Tools** from the menu bar, then select the **Mail Merge** option.
2. Select #1 option **Main Document Create**, select **Mailing Labels** and select **Active Window**.
3. Select #2 option **Get Data** and then select **Open Data Source**.
4. Type **C:\mtemp.doc** or choose the name of the file you created in CHERS in the **File Name Box** and select OK. Click **Open**.
5. MSWord will prompt you to click on **Set Up Main Document**. Select the type of label you will be using. The default is **Custom Laser**. Then select OK.
6. **Create labels.** To create your label format, select **Insert Merge Field** and select the first field you want to display on the label. Repeat until you have selected all the fields you want to display on your label. Remember to use your keyboard to enter spaces, commas, and use the enter key to move to the next line on the label. When you have completed your label, select OK.
7. Select option #3 **Merge** and select **Merge** again.
8. Make sure you view your labels on the screen to check for errors. You are now ready to print your labels.
9. If you make a mistake, don't worry. Just start over. You do not need to recreate the mailing file from CHERS.

Education

Exercise 7: Scheduling a 3218 Class Enrolling and Passing Students

1. Schedule a new 3218 class with an instructor.
2. Enter the following students:
 - a) David Ortiz, 333 Julia St, New Orleans, 70133, (504)232-0098, \$45
 - b) Jennie Well, 6100 Louis XIV Avenue, New Orleans, 70120, \$45
 - c) Adelle Simon, 1410 Valmont, New Orleans, 70120, \$20 (Adult CPR only)
 - d) Adam Smith, 4801 Desire Dr, New Orleans, 70126, \$40 (Infant and Child CPR only)
 - e) Tanisha Williams \$45 (no address)
 - f) Al Smith \$0, free course because Al is one of your volunteers (and therefore already in the people database!!)
3. Pass all students and issue the correct certificates (do not print them).
4. Change status of class from Open to Complete by clicking on the Complete button.
5. Review student and people records of individuals to see Training Taken and Teaching History.

Education

Exercise 8: Clients and Contracts

1. Enter the following Client:
 - a) United Shipping, 100 Barataria Blvd, NO, LA, 70122
 - b) Contact is Larissa James, 504 668 1900
 - c) Mailing group is H&S
 - d) This is a Full Service Contract relationship

2. In the Contract screen, connect a Full Service scheduled class with a client. Return to the Class screen to see that the income field has been populated from the Contract you wrote.

Education

Exercise 9: Find Student in Class, Retail Items, Reports

1. Find the student Joseph McMahon in a class. Change his Fees Paid to \$30.00.
2. Add two items to your list of retail items:
 - a) Community First Aid & Safety Book, \$15.00
 - b) Crescent City Red Cross T-Shirts, \$12.00
3. View on the screen the following reports:
 - a) Class Schedule Report for March and April 1999.
 - b) Any Class Roster.
 - c) An Expiring Certificates - Students report. (Use a wide date range, 1/1/97 to 1/1/07.)
 - d) A list of Instructors who will not be Re-Authorized -- whose authorizations will expire. (Run report for those with authorization expiration dates of 12/31/99 or 12/31/00.)

Education

Exercise 10: How To Enter A New Course Education Management

In the EDUCATION module choose MANAGEMENT/CODE MAINTENANCE

1. Create a certificate for your new course
 - a. Choose CERTIFICATES from the drop down menu
If you are creating a new certificate, enter a number on the left-hand bottom of the screen (we recommend using numbers over 9000) and click on the ADD button.
 - b. Complete the CERTIFICATES screen. Be sure to mark if you wish to use universal certificates for your new course. Click on SAVE.
2. Create your new course.
 - a. From the MANAGEMENT\CODE MAINTENANCE menu choose COURSES. Choose a number for your new course and type it in on the left-hand bottom of the screen, then click on ADD.
 - b. In the COURSES screen complete the information (only the RED fields are required). You will be prompted to enter a COMPONENT for your course.
 - c. Click on COMPONENTS and enter your course number. Since your new course is not yet on the drop down list, simply type the new course code number and it will be accepted with its new description.
 - d. Click on INSTRUCTOR ROLES and complete the information. You are able to set hours to credit the instructor and fees in this screen.
 - e. Click on POSSIBLE CERTIFICATES and select the certificate(s) you created for your course.
 - f. PREQUISITES, SUPPLIES, MATERIALS and RESOURCES are optional.

Student Exercises

4. AUTHORIZE your course.
 - a. From the MANAGEMENT\CODE MAINTENANCE menu choose AUTHORIZATION.
 - b. Enter your new course number on the bottom left hand side of the screen and include an "I" or a "T" to designate whether this course is taught by an instructor or instructor trainer. Click on ADD.
 - c. Complete the AUTHORIZATION CODES screen.

4. Set up TEACHING RULES for your course.
 - a. From the MANAGEMENT\CODE MAINTENANCE menu choose TEACHING RULES.
 - b. Complete each field.

Disaster Services

Exercise 11: Disaster Preparedness Management

1. Enter the following facility
 - a) St. Timothy Catholic Church, 344 Melpomene, NO, LA, 70123
 - b) Contact Fr. Harry at 504 667-4345
 - c) Give some facility specs (optional)

2. Enter the following Merchant
 - a) Piggly Wiggly Groceries. Enter an address, phone and contact, etc.
For Cost Class: Mass Care, Personal Living Needs, and Health Needs

3. Charge out the following DOs (Use ID of Tobey Berry, Disaster Services Manager, for the Issued By field):
 - a) E200670 through E200674 to Alexie Smirnoff
 - b) E200675 through E200679 to Susan Davidson

Disaster Services

Exercise 12: Entering Incidents, Cases and Charging Out Disbursing Orders

1. Add a new Incident
 - a) The Uptown Apartments Fire, March 15, 1999. 340 Central Blvd, NO, LA, 70127.
2. This was a disaster which affected two families. Write up two cases and the appropriate Disbursement Orders.
 - a) Ellen Norton and child, Joey, are now resting quietly with relatives. Red Cross wrote a DO, number E200670, for groceries at Piggly Wiggly, for \$160. They had minor damage to their apartment. Create an apartment number address (remember to first enter the incident to get the default street address).
 - b) Jerry Garcia and wife, Maria, are now at a hotel. Red Cross wrote a DO, number E200671, for 3-piece Dinette Set at Sears, for \$200. Major apartment damage.

Disaster Services

Exercise 13: Assigning a Facility, Shelter Registration, Recruiting and Assigning, Disaster Reports

1. Even though the Apartment Fire we entered was not so huge, assign a facility (Fortier High School) as a shelter and connect it to this Apartment Fire.
2. Since a shelter has been created, practice registering a few individuals into the shelter.
3. De-activate the shelter. (Fill in Date, Signed By, and Date Signed fields.)
4. Assign two volunteers as Family Service / Coordinators to the Uptown Apartments Fire incident. Release them 5 days later and credit them with 25 hours of work.
5. In Disaster Reports, view the Disbursements List with Date range of 11/01/98 through 03/05/99.

Additional Exercises

Disaster: Ad Hoc Recruitment

1. Utilizing the Ad Hoc Recruitment screen, assign five disaster workers to an incident.
 - Choose five people in HR People and assign them various disaster functions (mass care, damage assessment, etc) in the HR/Disaster Detail screen.
 - Choose Ad Hoc recruitment in the DS Management screen.
 - Call up individuals using the screen criteria of your choice. (Example-branches or by position).
 - Assign the individuals to an incident.
2. Batch release all individuals you have assigned.

Armed Forces Emergency Services

Exercise 14: AFES Cases and Services

1. Enter Cases and Services knowing the following information:
 - a) Reporting and Communication case service when Jenny Miller had a healthy baby in New Orleans Touro Infirmary. Husband David is in the Navy. Date July 8, 1998. (Create remaining data entry material . . .)
 - b) Financial Assistance: \$260 was loaned as air travel to Andre Hebert stationed at the Orleans Naval Base. He will visit his very ill mother in Seattle, WA. Red Cross narrative will show verification with medical staff. (Remember to press F5 or F6 in Narrative window for a date/time stamp.)

Armed Forces Emergency Services

Exercise 15: Destroying Cases, AFES Station Accounting

1. Destroy all cases with Destroy Date anytime in April of the year 2000.
2. Using the Branch code of Orleans Naval Base, enter the following receipts:
 - a) A service member donates \$50 to the Red Cross.
 - b) George McNulty paid another \$80 as a loan repayment.
3. Using Branch ONB, enter the following checks:
 - a) \$120 loan to a service member.
 - b) \$60 operating expense -- office equipment purchase (you may enter Operating Expenses only through NHQ Accounting menu option, Checks).
4. Create diskette for NHQ
 - a) Check register report
 - b) Receipt register --test first then deposit (may skip this if not attached to printer)
 - c) Export file to diskette (may skip this if not attached to printer)

System Administration

Exercise 16: System Set Up and Security

1. Add a new Branch
2. Add a few HR codes: Mailing Groups, Volunteer Departments, Volunteer Job Types
3. Add a few General codes: Counties
4. Find from the menu the place where you may Update Counters
5. In Setup Security, add a new user with the ID of GAULTR. Copy the template of SYSTEM but deny this user “access to Management Screens in Education” and do not allow this user to “access management options in Human Resources.”

Resource Scheduler

Exercises #17: Resource Types

1. The Chapter has the following Resources:

Item	Type
VCR Tape "Till Help Arrives"	
Book - First Aid	
Book - Life Guarding 101	
Adult CPR Mannequin	
Infant CPR Mannequin	
Child CPR Mannequin	
26" Televisions	
TV Stands	
Chapter Van	
Blank Class Certificates	
Video Player	
Overhead Projector	
Lap Top P166 Computer	

2. Group the above resources into 6 or 7 Groups and complete the table.
3. Go to Maintenance> Resource Types
4. Press the Add button
5. Enter the Resource Types defined in step 2 <Enter only the Type and NOT the item>
6. Press the Save button
7. Continue to add all resource types defined

Resource Scheduler

Exercises #18: Resource Items

1. The Chapter has the following Resources:

Item	Cost	Inventory	Usage Fee	Usage Unit	Quantity	Expendable
VCR Tape "Till Help Arrives"	\$25	5	\$2	Class	1	
Book - First Aid	\$25	100	\$15	Student	1	Yes
Book - Life Guarding 101	\$25	25	\$15	Student	1	Yes
Adult CPR Mannequin	\$1000	20	\$20	Student	.5	
Infant CPR Mannequin	\$800	10	\$18	Student	.5	
Child CPR Mannequin	\$950	10	\$18	Student	.5	
26" Televisions	\$260	2	\$10	Class	1	
TV Stands	\$100	2	\$5	Class	1	
Chapter Van	\$35,000	1	\$50	Class	1	
Blank Class Certificates	\$.02	1000	\$.02	Student	1	Yes
Video Player	\$200	5	\$25	Class	1	
Overhead Projector	\$300	2	\$40	Class	1	
Lap Top P166 Computer	\$3000	10	\$100	Student	.5	

- Using the defined types from Student Exercise #17, Enter the Resource Items above
- Go to Maintenance>Resource Items
- Select Resource Type for Item being entered
- Press the Add button
- Enter all Item information, check the expendable box for the expendable items
- Press the Save button
- Add the rest of the items

Resource Scheduler

Exercises #19: Reservation Template

1. Go to Maintenance>Reservation Templates
2. Click I.D. radio button
3. Click on the drop down menu and select course 3218
4. Click/Highlight <NEW> CREATE NEW TEMPLATE
5. Click on the Next button
6. Enter "Community First Aid and Safety 1" in the Description field.
7. For this class the following resources are needed: <Use the Type's that you created in Exercise 17>

TYPE	ITEM
	VCR Tape "Till Help Arrives"
	Adult CPR Mannequin
	Infant CPR Mannequin
	26" Televisions
	TV Stands
	Blank Class Certificates
	Video Player

8. Press the Finish button.

Resource Scheduler

Exercises #20: Add/Edit Reservations

1. Go to Reservations>Add/Edit Reservations
2. Enter the Class ID: _____ and press Find button
3. Highlight <NEW> CREAT NEW RESERVATION
4. Press the Next button
5. Highlight "Community First Aid and Safety 1" template
6. Press the Next button
7. Enter "Class _____ Schedule 1" in the Description field
8. Enter Tomorrow's Date in the Start Date field
9. Enter 8:00 AM in the Start Time field
10. Enter 5:00 PM in the End Time field
11. Press the Next button
12. Add the Child Mannequin:
 - Click in the Resource Type field and select the type you gave for the Child Mannequin
 - Click in the Resource Item field and select the Child Mannequin
13. Press the Finish field
14. Press OK when pop up box appears for the saved reservation

Resource Scheduler

Exercises #21: Return Expendable Items

1. Go to Reservations>Return Expendable Items
2. Enter Class ID _____
3. Press Find button
4. Highlight "Class _____ Schedule 1"
5. Press the Next button
6. Enter 1 in the Returning column for the Class Certificates
7. Press the Finish button