ASSET Users' Guide

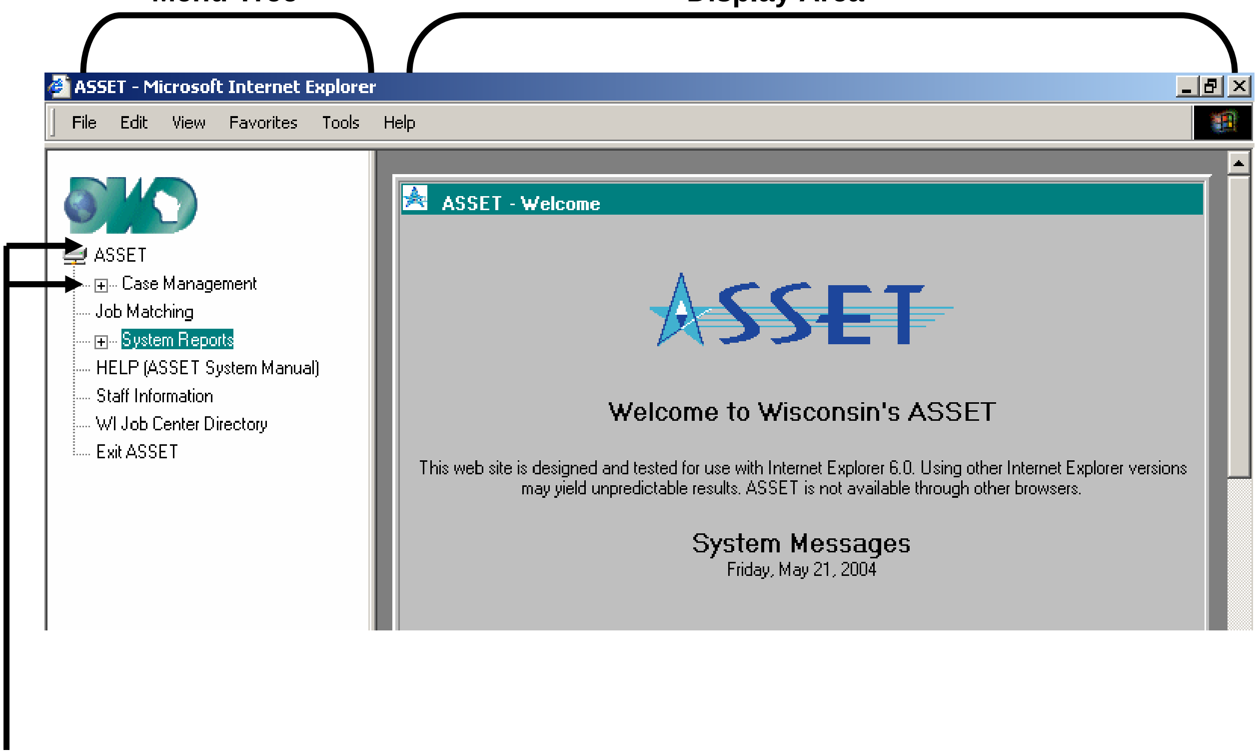
ASSET INFORMATION

2-1 PRESENTATION OF ASSET INFORMATION

ASSET uses a split screen approach to presenting information. The Welcome screen below shows the split screen. There are two parts to the screen that remain fixed – the **Menu Tree** on the left and the **Display Area** on the right.

Menu Tree: The left side of ASSET screens always displays a Menu Tree that shows the high-level modules of the system. As new functionality is added to ASSET, the list on the menu tree will grow. This is an example of the current ASSET Welcome screen showing the Menu Tree.

Menu Tree **Display Area**



Some of the system modules are further divided into **Functions**. In the above example, a plus sign (+) is located next to the Case Management and System Reports modules. A single CLICK on the plus sign will expand the menu to display the functions included in Case Management and a list of reports included in System Reports. When expanded, the + turns to a minus (-) sign.

In the future, new system modules may be added to the Menu Tree, or new functions under Case Management may be created. If the Menu Tree is expanded beyond the length of the screen, scroll bars appear to facilitate movement between menu items.

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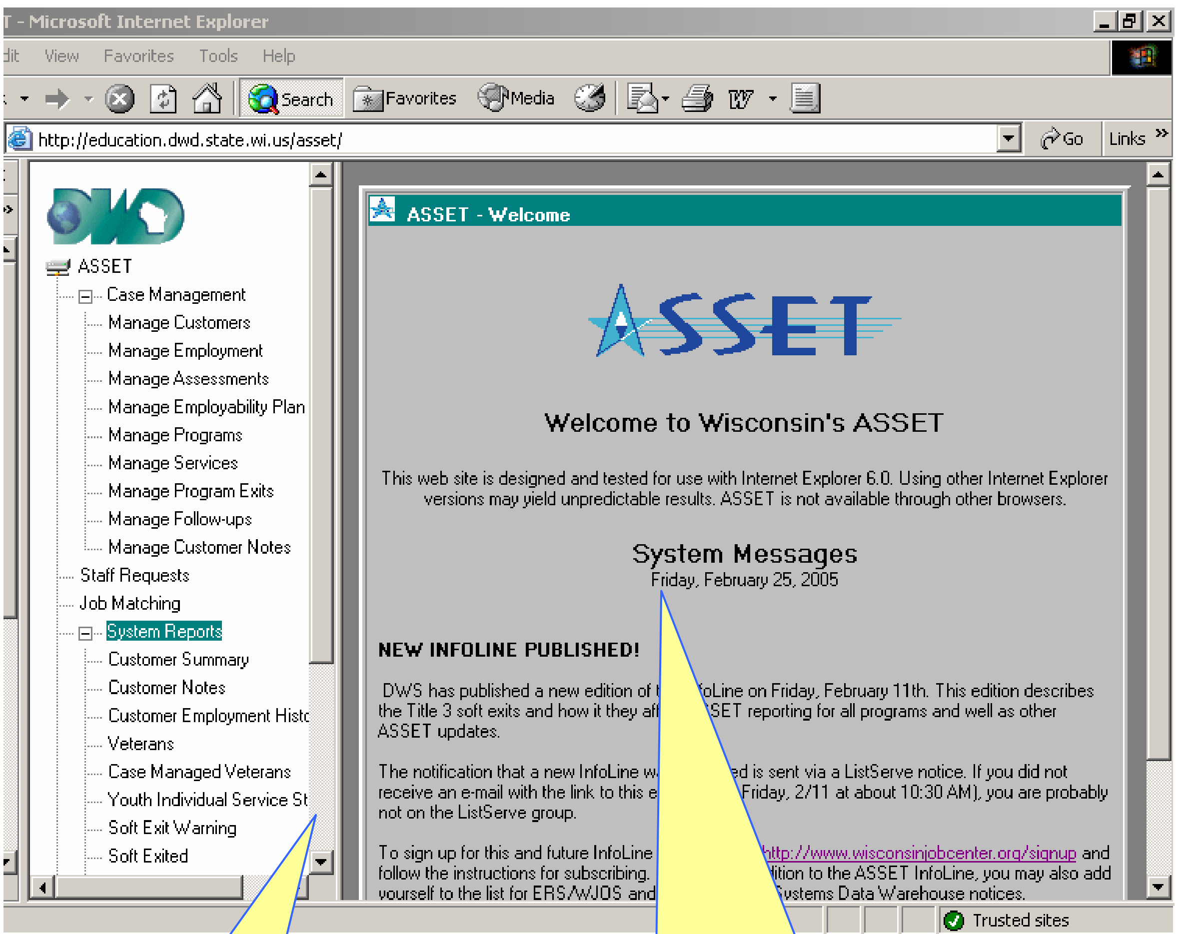
Below is an example of the ASSET Welcome page with all the functions expanded. Notice that a scroll bar has appeared.



Menu Tree is expanded and a Scroll Bar appears.

System Messages
Read these system messages every time you sign on to ASSET. These messages give important information about new features that have been added to the system or advise of problems or special events that affect system use.

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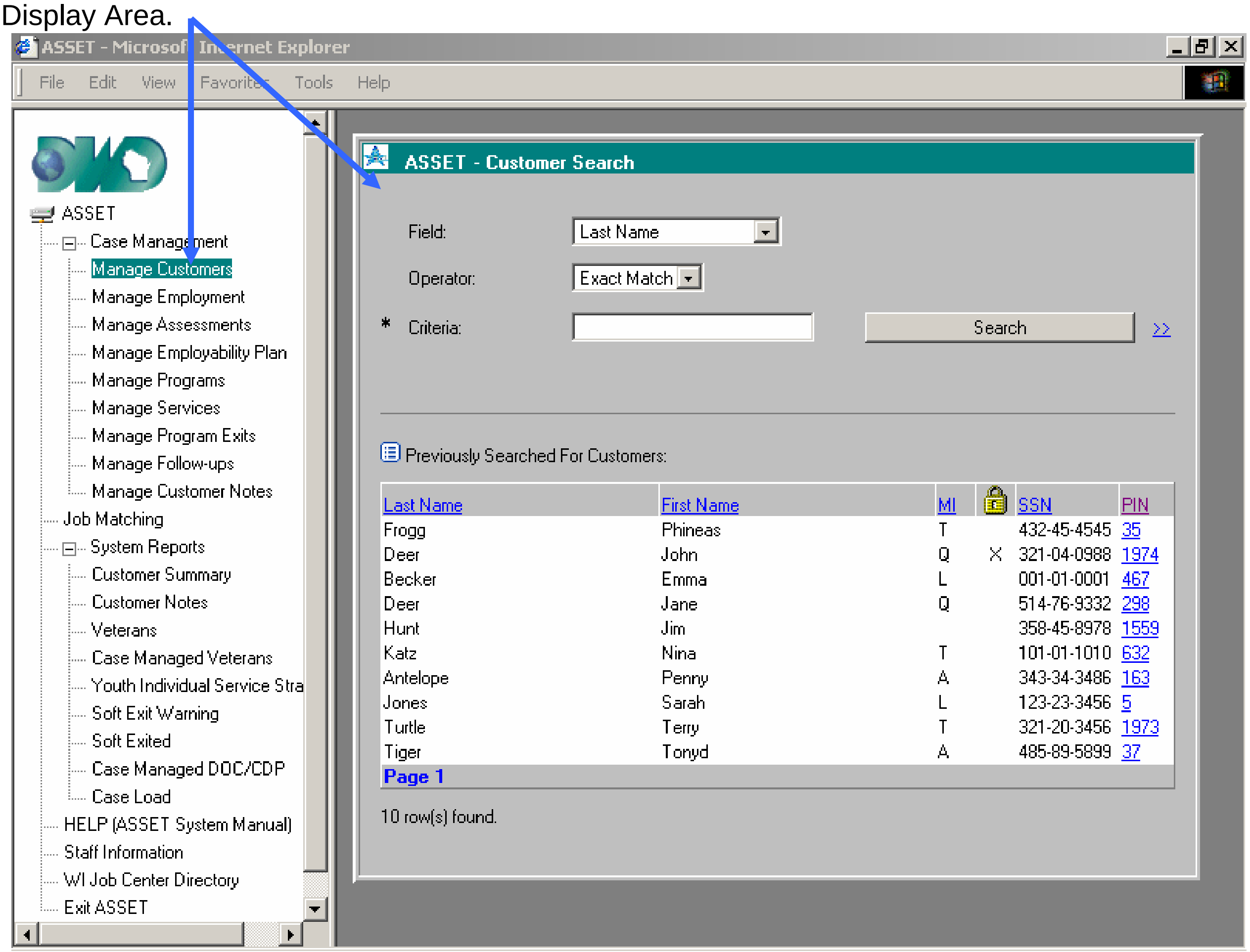
2-1 ____PRESENTATION OF ASSET INFORMATION____

Display Area
The right side of the screen is always reserved for the display of system screens. The action selected on the Menu Tree results in the appearance of a screen in the Display Area. The new screen in the Display Area will depend on the function selected.

> Note: To adjust the width of the Menu Tree or Display Area, position the mouse pointer over the boundary line between the screens until a sideways arrow appears. ↔
> Drag the line to the right or left. Moving the line to the left narrows the Menu area and widens the Display Area.

In the Case Management Module, the first screen level always is the **Search** level. (The example below is the Search Level screen within the Manage Customer function in Case Management.) It is a necessary step that gives the user an opportunity to retrieve or select the appropriate customer record for whom information is needed or being reported.
Example: Clicking on Manage Customer on the Menu Tree opens the Search function in the Display Area.



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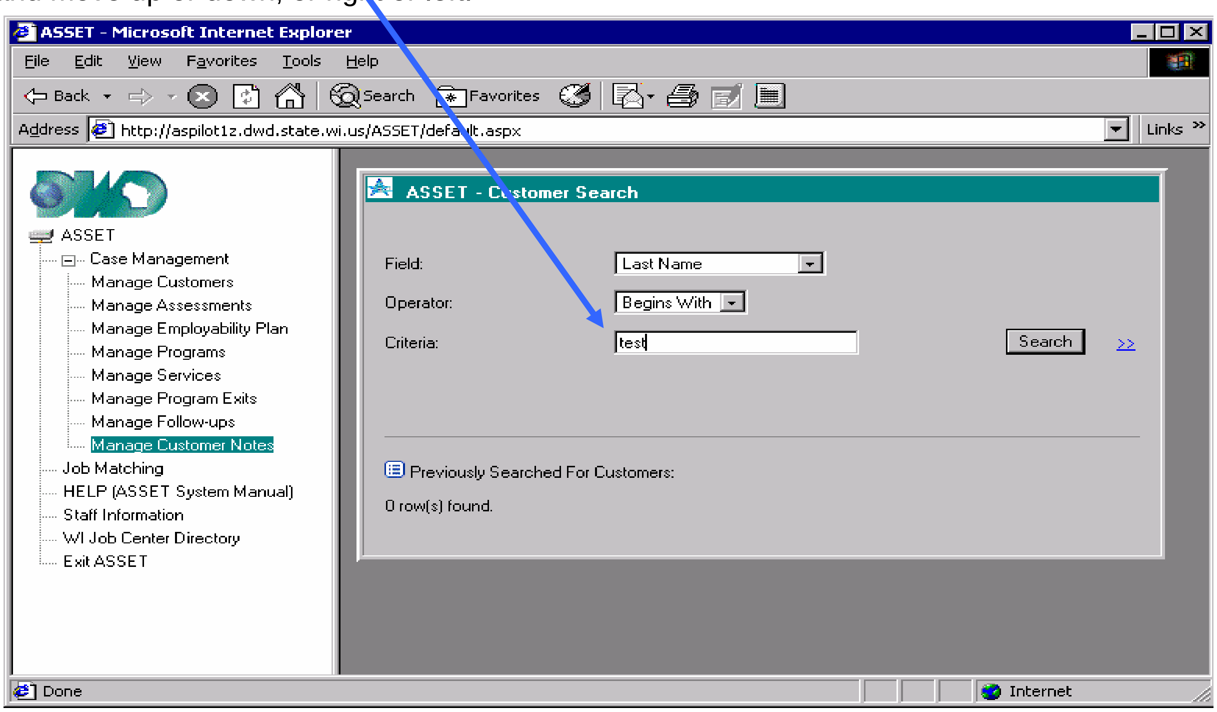
In all of the Case Management functions, the search level screen looks the same. For convenience, there is a list for this user of the ten most recently searched for customers. This list is the way workers are able to move from function to function for the same customer, or to come back to the customer at a later time.

When the user finds the desired record, a simple click on the link (which is underlined and in blue) for that record moves the user on to the next level of functionality. If it is a new record or not recently searched for record, the user needs to conduct a search of the database by entering the criteria for matching. See "Customer Search Process" for complete instructions.

The search of the database for a requested record results in a Search Results screen being returned. If there is no match on the database for the criteria selected, a No Match message is displayed (0 rows found). If the criteria are matched, one or more rows of data will be returned and the number of matched rows is displayed. If more matches are found than can be displayed on a single screen, a Page indicator appears in the lower left corner of the page. The user may move to the additional pages by clicking on the page number.

Scroll Bars
If the information displayed on the Menu Tree or on screens in the Display Area exceeds the length or width of the monitor, scroll bars appear for navigation purposes. To use a scroll bar, position the mouse pointer on an arrow and CLICK until the desired information appears, OR position the mouse pointer on the square box within the scroll bar, hold the mouse button down and move up or down, or right or left.



ASSET INFORMATION

2-1 PRESENTATION OF ASSET INFORMATION

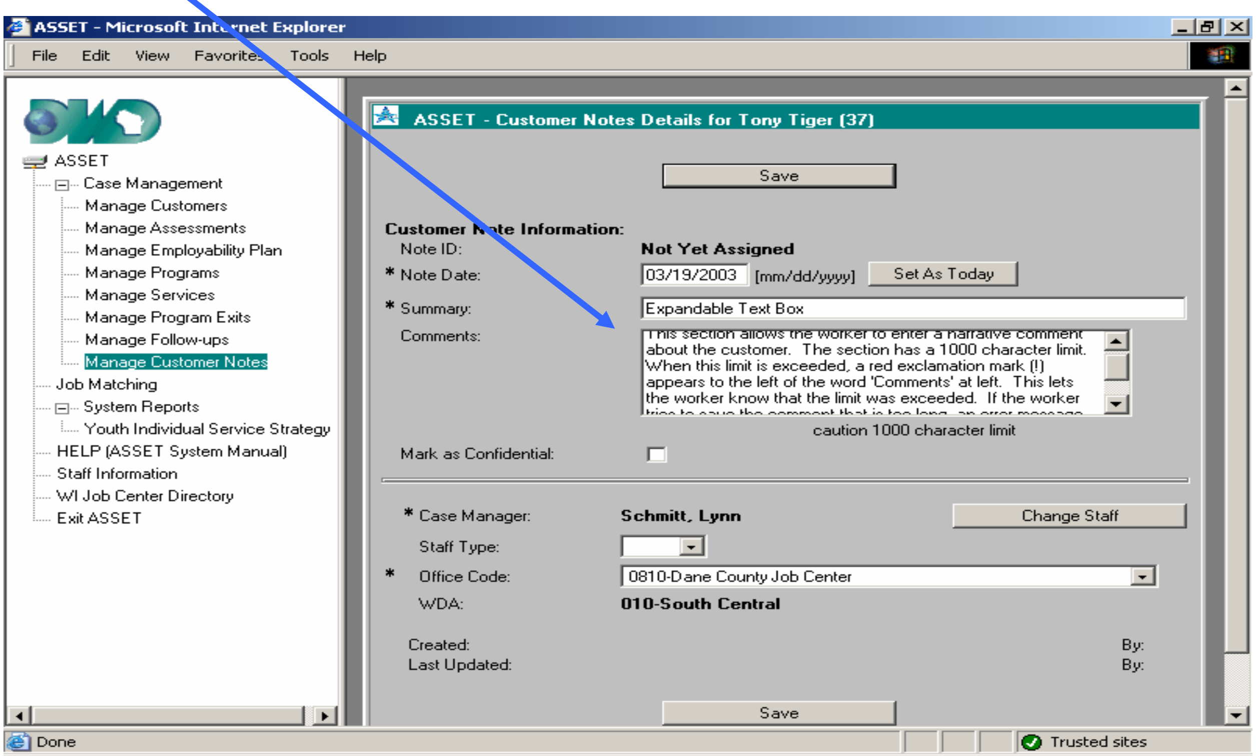
Information Fields on System Display Screens
Information fields in ASSET are displayed in five different formats:

1. **Text boxes** – to enter information, position the mouse pointer in the box and enter the information requested using the keyboard. The text box size is a good indication of the number of characters that may be entered.
2. **Expandable text boxes** – these are text boxes which have scroll bars (up and down arrows) on their right side. The scroll bars can be used to vertically navigate within the box. The general rule for a text box is "What you see is what you get." Use upper and lower case, use accurate spelling, format correctly and separate into paragraphs (applicable to expandable text boxes). In short, make it easy to read!

NOTE: A limited amount of text may be "cut and pasted" from another source. The font and point size from the original source will not be retained, but will be changed to conform to the default set for the information field.

Expandable text boxes are limited in size, despite being expandable. For example, the Comments box below has a 1,000-character maximum. Most of the larger text boxes in ASSET will have a message below the box indicating the character limit for that box.

Example:

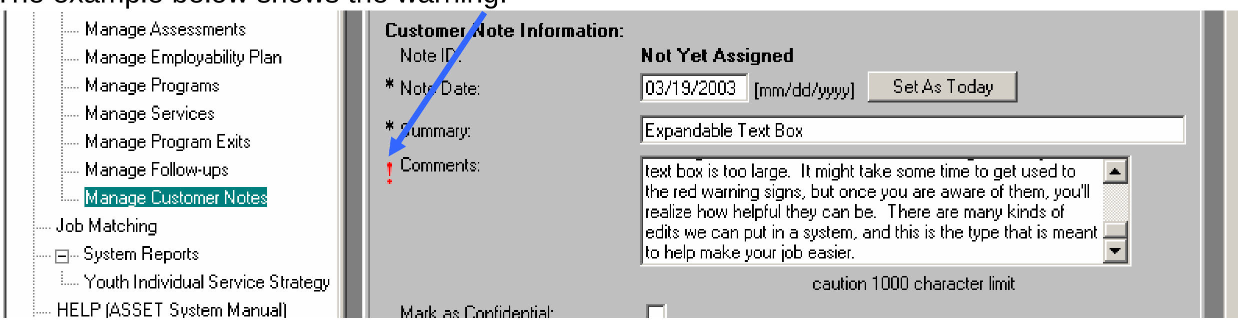


ASSET INFORMATION

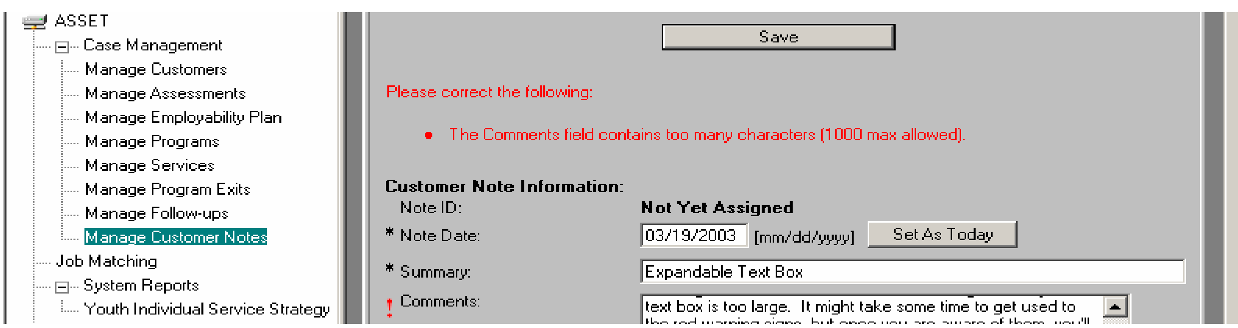
2-1 ____PRESENTATION OF ASSET INFORMATION____

When the worker is entering a narrative that exceeds the character limit for that expandable text box, a warning appears in the form of a red exclamation mark (!) to the right of the word "Comment". The worker must delete sufficient characters to reach the limit and before the red exclamation mark will disappear.

The example below shows the warning:



If the worker tries to save the Customer Note, a system error message appears as shown below:



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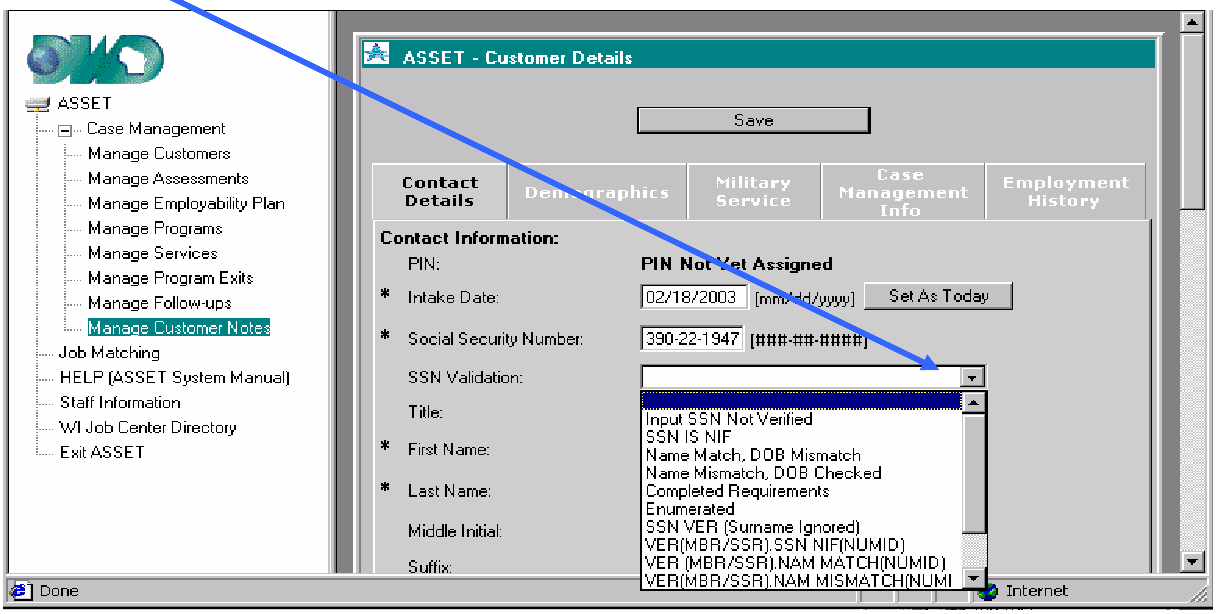
2-1 ____PRESENTATION OF ASSET INFORMATION____

3. **Drop down boxes** – these have a down arrow at the right of the box. Position the mouse pointer over the arrow and CLICK once. To choose a selection in the box, position the mouse pointer over the desired selection and CLICK once.

Example:



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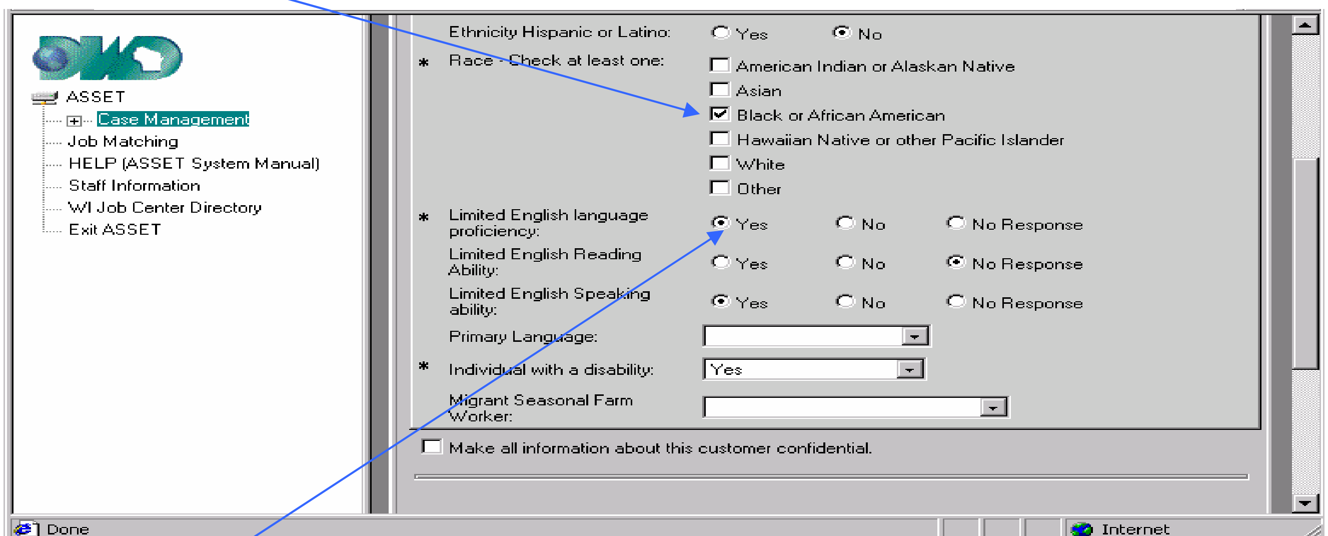
2-1 ____PRESENTATION OF ASSET INFORMATION____

4. **Check boxes** – check boxes are used when one or more responses in a field may be selected. To respond affirmatively to a check box, position the mouse pointer over the desired selection and CLICK once.

Example:



5. **Radio Buttons** – radio buttons are used when only one response in a field may be selected (Yes/No, etc.). To select a radio button, position the mouse pointer over the desired circle and CLICK once. Often, one of the buttons will already be chosen. This is the default that has been assigned to the field.

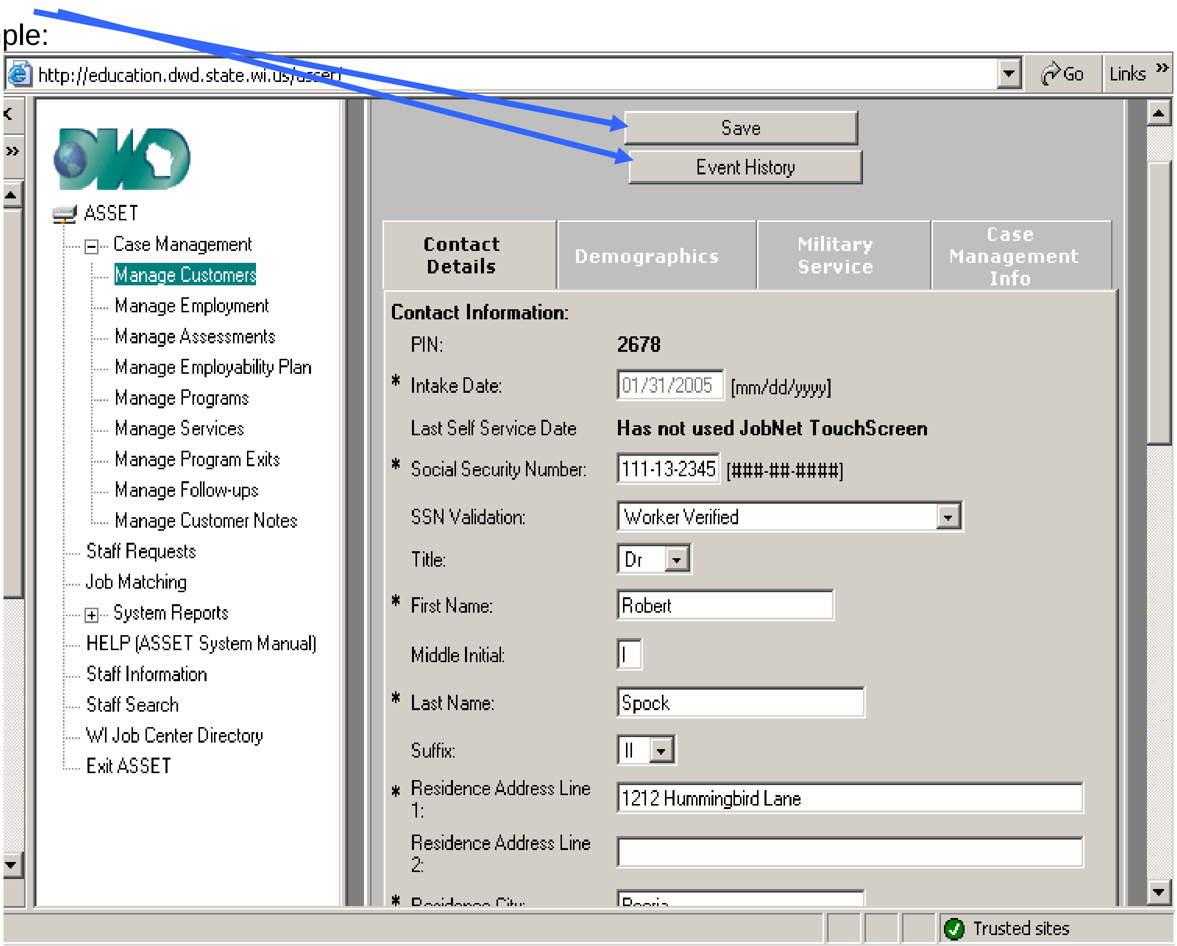
ASSET user's who have the Windows XP version may experience problems discerning which radio button(s) were selected. Changing the properties of the Display rectifies this situation. To set this up, Right Click on the desktop and select Properties, Click on the "Appearance" tab, then change the "Windows and Buttons" from Windows XP style to Windows Classic Style.

ASSET INFORMATION

2-1 ____PRESENTATION OF ASSET INFORMATION____

Action Buttons
In addition to the above formats for information fields, **Action Buttons** are used on the display screens to initiate a variety of actions. (Save, Add Service, Add Program Exit, Event History, Update, etc.) These buttons tell the system what the user wants to do with the information entered or what to do next. Some edits are also associated with these buttons so users are prompted when information fields are incomplete or incorrect.

Example:



Auto tabbing has been added in fields where it is possible (within Area Codes and Telephone Numbers, Dates, etc.). For example, if an Area Code is keyed, the cursor will jump (tab) to the field in which the Telephone Number is keyed.

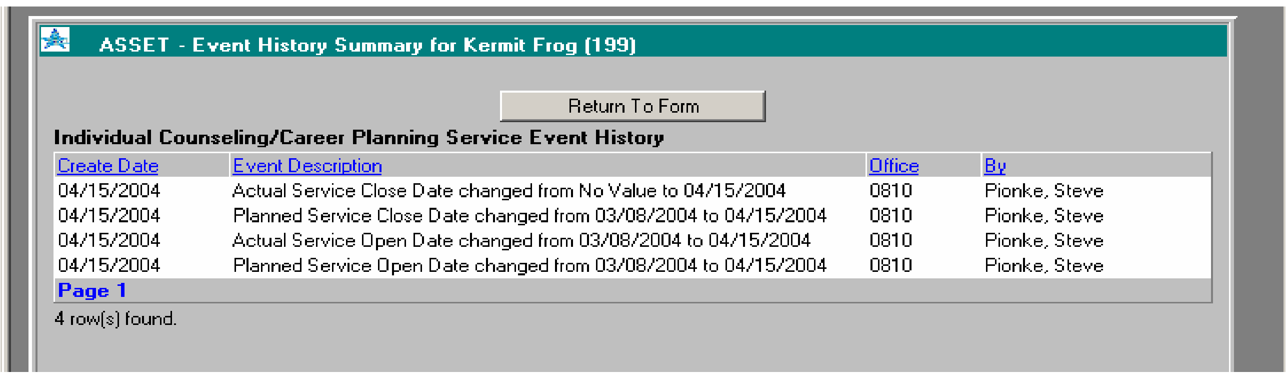
The Event History tab identifies specific changes in ASSET (called the audit trail). To access the history of changes, click on the Event History button located on the page. A new page

ASSET INFORMATION

2-1 PRESENTATION OF ASSET INFORMATION

appears showing which fields were changed, who made the change(s), and the office number and the person who completed the change(s).

The following page appears when the user clicks on the Event History button:


ASSET - Event History Summary for Kermit Frog (199)

Return To Form

Individual Counseling/Career Planning Service Event History

Create Date	Event Description	Office	By
04/15/2004	Actual Service Close Date changed from No Value to 04/15/2004	0810	Pionke, Steve
04/15/2004	Planned Service Close Date changed from 03/08/2004 to 04/15/2004	0810	Pionke, Steve
04/15/2004	Actual Service Open Date changed from 03/08/2004 to 04/15/2004	0810	Pionke, Steve
04/15/2004	Planned Service Open Date changed from 03/08/2004 to 04/15/2004	0810	Pionke, Steve

Page 1

4 row(s) found.

Clicking on the Return to Form button brings the user back to the previous page.

PRINTING ASSET PAGES

Workers are able to print the screens in ASSET to have a paper record of the case. (Active Server Page or ASP is the correct name for the display screens.) Most ASSET pages are simple displays of information that can be printed using the print icon on the browser's tool bar or Control+P. However, several functions in Case Management use a tabular format. These complex pages cannot be printed in this simple fashion.

The tabular format structure in ASSET is a convenient strategy for keeping the span of a single page to a reasonable length. However, a "feature" of the software used to create the tabular pages also prevents the worker from printing each tab. (Feature, meaning the way it works, not the way we'd like it to work!)

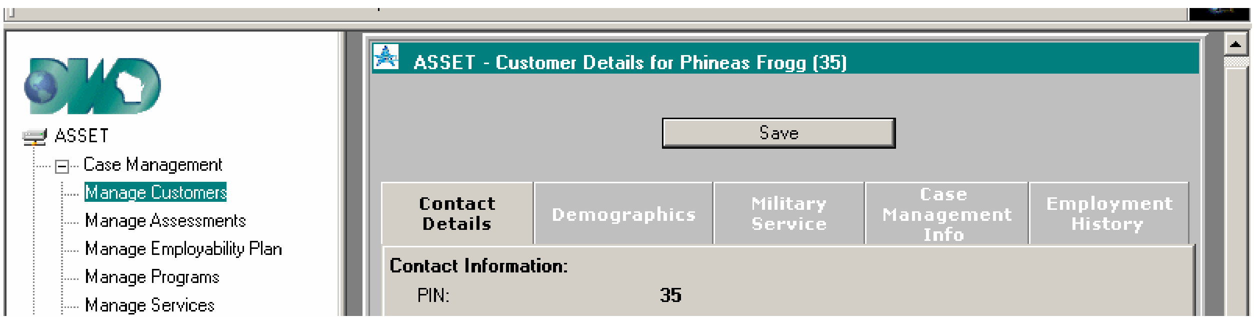
To overcome this software inefficiency, the ASSET design includes a button on all tabular format pages that allows the worker to remove the tabs, print the complete record, and then return to the form.

CAUTION: The print button is disabled until data is entered and the Save button is clicked.

ASSET INFORMATION

2-1 ____PRESENTATION OF ASSET INFORMATION____

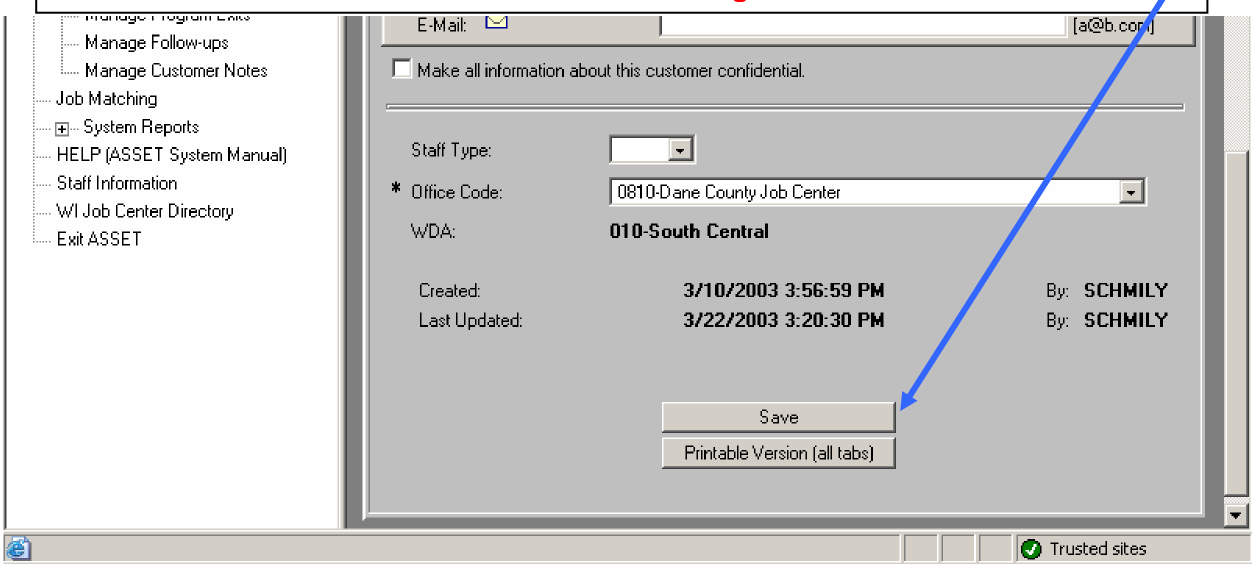
The examples below show the print process for pages with tabs:



At the bottom of every tabbed page in ASSET is a button for a Printable Version (all tabs). This button opens a new window that removes all the tabs, putting the information in one long page that will print (portrait on 8 ½ X 11 paper).

The new view of the printable version lies on top of the tabbed ASSET view. The information on this view is not updateable, as can be seen by the fields being grayed out. This was done to prevent inadvertent changing of data on the printed version.

CAUTION: Remember to save before clicking on the Printable Version!



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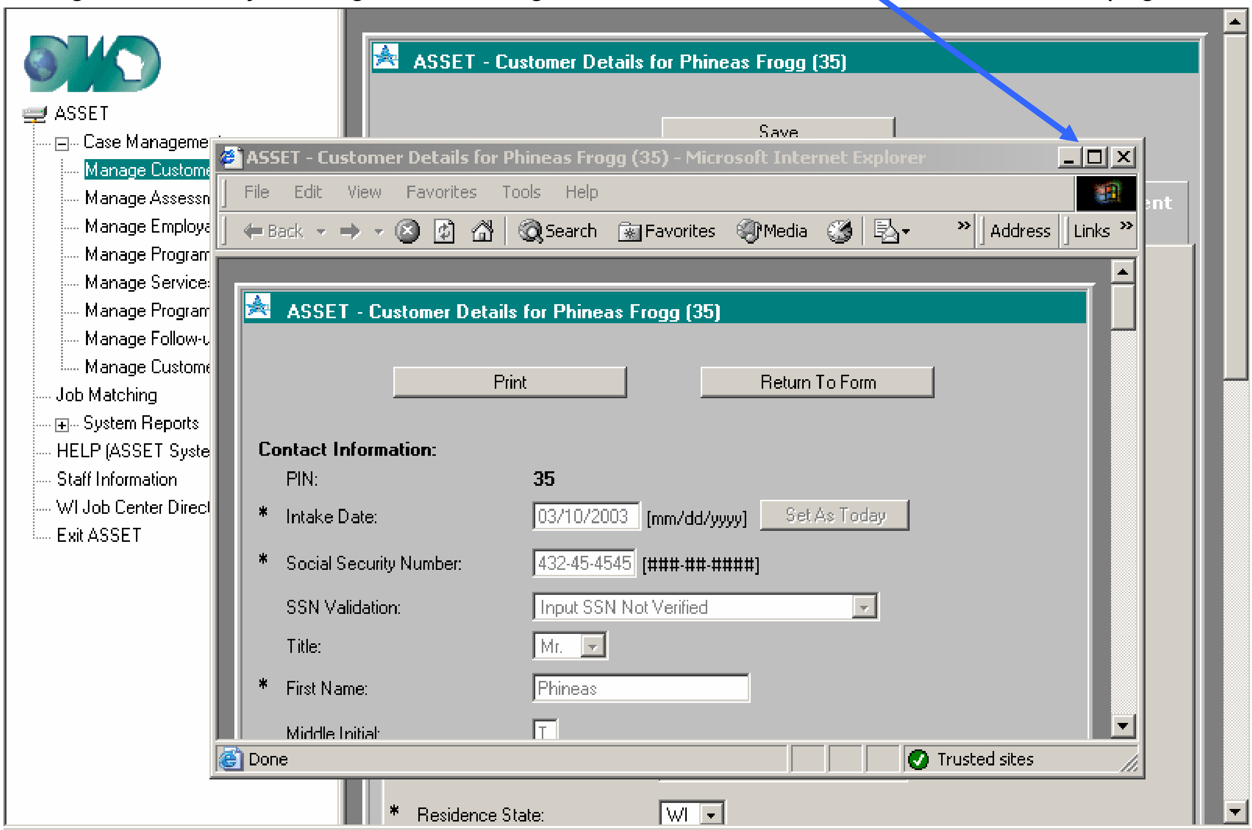
ASSET INFORMATION

2-1 PRESENTATION OF ASSET INFORMATION

This is the view the user sees when they click on the Printable Version button. Users may enlarge this view by clicking on the enlarge button allows the user to see more of the page.



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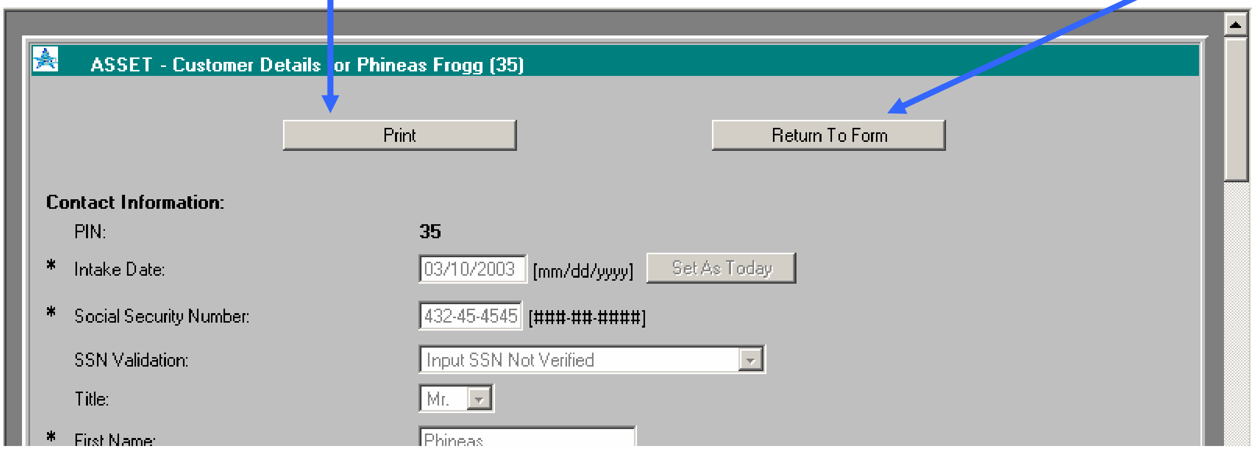
2-1 PRESENTATION OF ASSET INFORMATION

Click on the Print button. To close and return to the tabbed form, click on Return to Form.



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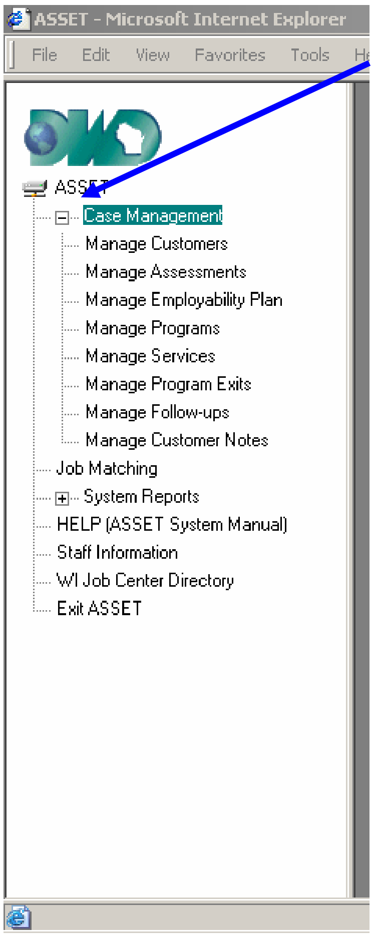
ASSET NAVIGATION OVERVIEW

2-2 ____NAVIGATION WITHIN ASSET_____

Workers will always start from the Menu Tree on the left, selecting the module they wish to use by moving the cursor to that module. The module becomes highlighted and click the left mouse button once, and the module will open. If there is a plus (+) sign, functions within that module will be expanded, and selecting one of them in the same manner will open the function.



In this example, the Case Management module was expanded by clicking on the + sign (which turns to a – sign), and the cursor was moved over the Manage Customers function within that module. Clicking on this function opens a new screen in the Display Area, which is the starting point for Managing Customers.

Other ASSET modules do not have additional functions within them (no + sign). They move directly to the starting point for that module. However, two of these system modules - HELP and WI Job Center Directory, each open a new browser window, giving the worker an opportunity to get User Guide information or Job Center information without exiting ASSET. These secondary windows may be left open or closed after use.

Each of the high-level modules is described below.

Case Management

This is the part of the system where workers manage the day-to-day work that they do with our customers. Most of a worker's interaction with ASSET will occur within this part of the system. ASSET's primary purpose is to provide a case management system for workers to use as tool to keep track of and report on the services and pertinent data regarding job seekers. To facilitate this activity for workers, the design of the ASSET screens supports the easy movement from one function to another. Additionally, design features are consistent throughout, making the system more user-friendly and easier to learn.

Staff Requests

This function allows workers to submit requests for data corrections directly in ASSET. In addition to ability to request data fixes (called the Data Change Option), staff is able to direct e-mail like messages to each other regarding specific customer records by selecting the General option feature.

Job Matching

The job-matching module allows a worker to search JobNet Business for job openings for ASSET registrants. At implementation, Job Matching does not have interaction with the Service reporting in Case Management. This is a planned future enhancement.

ASSET NAVIGATION OVERVIEW

2-2 ____NAVIGATION WITHIN ASSET_____

System Reports
The System Reports, when opened shows a listing of all available on-line reports. When the worker clicks on a specific report, the ASSET database is searched (is real-time) and the report is produced. The report may then be printed.

HELP (ASSET System Manual)
The **HELP** link connects the worker directly to this online ASSET Users' Guide by opening a second browser window to the DWD Manuals area. Workers will find this a convenient tool to check definitions, clarify system functionality, or learn how a feature of the system works. When the window is closed, the worker is still in ASSET and ready to proceed.

Staff Information
The purpose of this module is to allow users to update information about themselves or the offices in which they work. This is the part of the system that controls the administrative information about offices, users, and worker characteristics. It "sets the defaults" for all the actions taken by a worker in the Case Management, so that User IDs, Office Numbers, WDAs etc. automatically fill when a worker reports information on a customer.

Staff Search
This option allows an ASSET user to locate a worker in another office or WDA. This information is reflective of information that staff have entered on the Staff Information screen.

WI Job Center Directory
This module is a link directly to the DWD Wisconsin Job Center Directory. It opens a second browser window that allows workers to get information about Job Centers without leaving ASSET. When this second window is closed, the worker is returned to the same screen in ASSET.

Administrative Tools
This module is available only to specified system users who have authority to perform administrative functions on the system. This option should not be active for the majority of ASSET users, and will not appear on their menu tree.

ITA Administration Tools

Exit ASSET
This is the Log Off function that closes ASSET.

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ASSET Users' Guide

ASSET ORGANIZATION

2-3 ____ORGANIZATION OF PROGRAM INFORMATION____

The programs brought together under the WIA umbrella each had historical policies, practices, and terminology. The Title 1B Adult, Dislocated Worker and Youth programs grew out of the former Job Training Partnership Act (JTPA) and its systems – WIMS (Wisconsin Information Management System) & WIA/WIMS. The Title 3 programs were formerly associated with Wagner-Peyser and its system – AMS (Automated Matching System). With the installation of G*STARS (renamed ASSET), the two systems became one. Staff not only had to learn the mechanics of a new system, but also had to understand the terminology used by the other.

The implementation of Re-engineered ASSET affords an opportunity to reorganize the structure of the data in the system and make definitions consistent throughout. A different view of data organization than in the G*STARS/ASSET model could be done because we were moving into a relational database structure. Furthermore, as the business requirements for the new ASSET were developed, it became clear that all ASSET users needed to be using the same vocabulary and definitions when dealing with the program services provided to our customers. The ASSET model reflecting the new structure is described below.

Customer Record Level

The highest level of data is at the **Customer** level. This is the base record for all other functions within ASSET and it is the responsibility of all ASSET users to ensure that this data is accurate and kept up-to-date. The Customer level data is the demographic data information about the person that is uniformly defined and shared among all programs represented in the system. Other ASSET functions are connected to the Customer and relate directly to the person regardless of program affiliation. These include Case Notes, Comprehensive Assessment, and Employability Plan. All programs will share the data included in these functions.

Program Level

The next level of the data structure is Program. Each of the programs reflects the policies applicable to it. The data specific to each program is captured and stored at the Program Registration Level. At this level, a customer's information is uniquely defined for a particular data element according to the policies and guidelines for that program.

There are three programs represented in ASSET: **WIA Title 1B, WIA Title 3 Wagner-Peyser, and Trade Adjustment Act (TAA)**.

For each of these programs, there are separate dates that track when the person entered and left that program. At the program level, these dates are called Registration Date and Exit Date. A customer may have multiple Episodes that are historically retained in the system and show each time a person entered and left a program. Each Program has different rules regarding when a person may be exited.

ASSET ORGANIZATION

2-3 ____ORGANIZATION OF PROGRAM INFORMATION____

Other program-specific information is captured at this level. For example, certain data elements that must be permanently held (e.g. Age at Registration) as well as modifiable information like the name of the primary case manager are program-level attributes.

Program Area Level

The third level of the data structure is **Program Area**. At this time, only the WIA Title 1B Program has Program Areas. They are **Adult, Dislocated Worker, TAA** and **Youth**.

Each has specific eligibility and information requirements that are relevant only to that Program Area and data captured only at this level within a Program Area are stored historically at this level. To distinguish this level, new terminology is being introduced to describe the start and completion of participation in a Program Area. Each Program Area will have a **Begin Date** and **End Date** associated with it that indicate the period of time a customer is being case managed by that Program Area.

Details Level

The Detail level is lowest level of the data structure. The primary types of details are **Services** and **Follow-Ups**. For a Service to be properly reported, it must have a start date that is either planned or actual. It also must have a completion date, either planned or actual. ASSET uses the terminology **Planned Open**, **Actual Open**, **Planned Close** and **Actual Close** to document these important dates.

Here is a chart that shows the relationship of the above-described levels. The terminology used for the dates relating to that level is shown in italics.

Users' Guide

ASSET ORGANIZATION

2-3 ____ORGANIZATION OF PROGRAM INFORMATION____

Level 1: Customer Record

Customer
(System Create / System Inactivation)

Level 2: Program

Wagner-Peyser **TAA** **WIA Title 1B**
(Registration Date / Exit Date)

Level 3: Program Area

Adult **Dislocated Worker** **Youth**
(Begin Date / End Date)

Level 4: Details

Services and Follow-ups
(Open Date / Close Date)

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