



Reference Guide

APRIL 20, 2022

VERSION 3.0

Updates to this Guide

Release	Section	Updates
April, 2022	7.0 Admin > Manage Genders	Added instruction for creating district-defined genders.
April, 2022	9.0 Student Mass Actions	Added instruction for new Mass Update Student Placement functionality.

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1.0 Introduction

myWEX™ is a secure, web-based application designed to manage the student information requirements for school districts with students enrolled in work experience programs. Key features in myWEX include:

- Information tracking on students, schools, employers, activities and hours in a fully relational database.
- Integration (student import) with MyEducation BC student information system.
- Security models to control access and modification of data at district and school level roles.
- Secure Socket Layer encryption.
- Support for all for modern web browsers with no requirements for external plug-ins.
- Full compliance with FIOPPA. Data is securely hosted on Canadian servers with automatic daily offsite backups (also located in Canada).

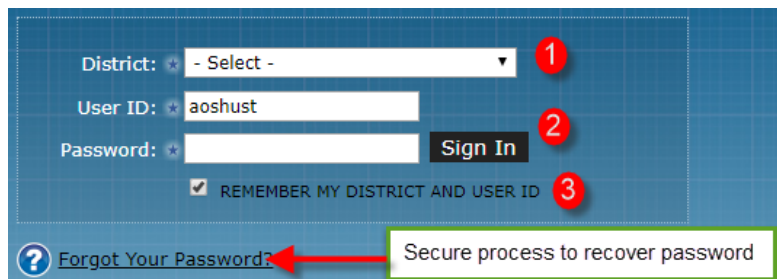
2.0 System Requirements

myWEX is designed for any modern web browser. myWEX uses XHTML 1.0 Strict and CSS 2.1 as specified by <http://www.w3c.org>. No external browser plug-ins are required.

3.0 Connecting to myWEX

To connect to myWEX, navigate to <https://mywex.ca/> and sign in with the User ID and password provided.

1. Use the drop-down menu to select the district.
2. Enter User ID and Password provided.
3. Select “REMEMBER MY DISTRICT AND USER ID” checkbox (optional).



Notes:

- The creation, management, and support for user IDs and passwords is the responsibility of district personnel.
- The “Forgot Your Password” process provides a secure option for end users to regain access when district help is not available. Note that access to the user’s email address is required to securely complete the process.
- For security purposes, three consecutive failed sign-in attempts will temporarily lock the user account for up to 15 minutes.

4.0 The Help Menu

Online Help

The online help menu item is where this reference guide is found! As well, the Online Help menu contains **important information about updates and enhancements** to myWEX in the **What's New in myWEX** bulletins.

[Help > Online Help](#)

What's New in myWEX™ January 2019 (PDF)

✔ New Employer Workflow for Level 2 - School Coordinators

Technical Support

The Technical Support menu item is used to submit tech support tickets for requesting help, enhancements or reporting bugs. All open or unresolved requests will display on the screen. Tech support requests that have been resolved and closed can be viewed by checking the "Show Closed Requests" box.

- Use the paperclip icon below the Technical Request Details field to attach screenshots or documents that are relevant to the tech support request.

 Create Technical Support Request ☐ Show Closed Requests

[Help > Technical Support > Technical Support Request Details](#)

New Technical Support Request from Alyson Oshust (alyson@mytruenorth.ca)

Subject: ★ BRIEF DESCRIPTION OF REQUEST

Request Priority:

Request Type:

Daytime Phone: ★ WHERE WE CAN REACH YOU BETWEEN 8:00 AM AND 4:00 PM

Technical Request Details: ★

Details of tech request should include the navigation to the screen you're on, what the expected result is and what is not happening as it should.

1351 available characters



[Back](#) [Create Support Request](#)

About myWEX

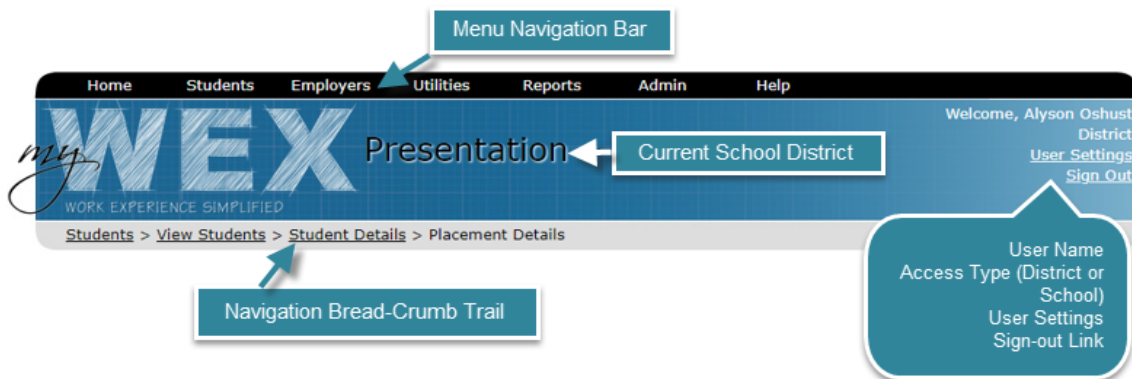
The About myWEX menu option displays the organization it is licensed to and the contract renewal date.



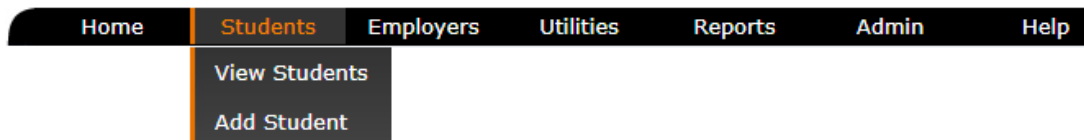
5.0 User Interface Overview

This section provides an overview of the important and unique user interface elements utilized in myWEX.

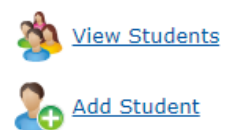
Banner Elements



Navigation Menu



For convenience, each menu can also be displayed with standard icons and web links. For example, clicking on the “Students” menu item will display the following:



The Navigation Bread Crumb Trail displays the current page as well as the link path from previous pages. This is a useful mechanism for back tracking.

[Students](#) > [View Students](#) > [Student Details](#) > Placement Details

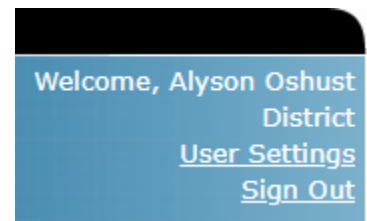
A final way to navigate within myWEX is via the buttons at the bottom of each page:



Important! myWEX is a web application that relies on its own navigation system. For this reason, do not use the browser “back” and “forward” buttons to navigate.

The **User Settings** link provides access to settings specific to the end user, such as changing the password.

The **Sign Out** link is the recommended way to end a myWEX session. This should be done before closing the web browser window.



Multi-Select Tools

myWEX provides a unique multi-select dropdown element. This allows selection of multiple items to provide a powerful record search tool.

Traditional Dropdown Element
(allows selection of one value)

Grade: ★ 12 ▼

Multi-Select Dropdown Element
(allows selection of multiple items)

Grade:
Multiple ...

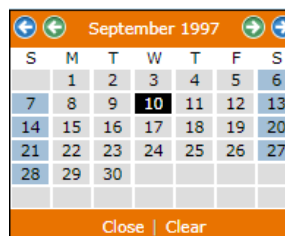
- ☒ 12
- ☐ 11
- ☒ 10
- ☒ 9
- ☐ 8
- ☐ 7
- ☐ Post Grad
- ☐ Did Not Grad

ALL | NONE | CLOSE

Calendar Control

All calendar controls in myWEX include an icon to display a visual calendar selector with month/year navigation:

Birthdate: ★ September 27, 1997 



S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Close | Clear

See tips below for quick calendar date entry.

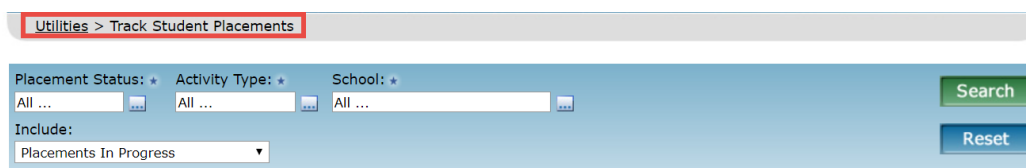
Dates can be entered much more quickly via direct keyboard entry. Examples are listed below.

Keyboard Entry (followed by TAB key)	Displayed Date	Notes
sep 1	September 1, 2016	only three digits of month required and calendar day, the current year is implied.
sep 1 16	September 1, 2016	three digits of month, calendar day and two (or four) digits of month (no commas required).
sep 1 2016	September 1, 2016	Same as above but using four digits for year.
+30	October 1, 2016	Assigns the date exactly 30 days forward from today (assuming today was September 1). Use any positive integer.
-30	August 1, 2016	Assigns the date exactly 30 days backward from today (assuming today was September 1). Use any negative integer.
t	"today's date"	Assigns current date.

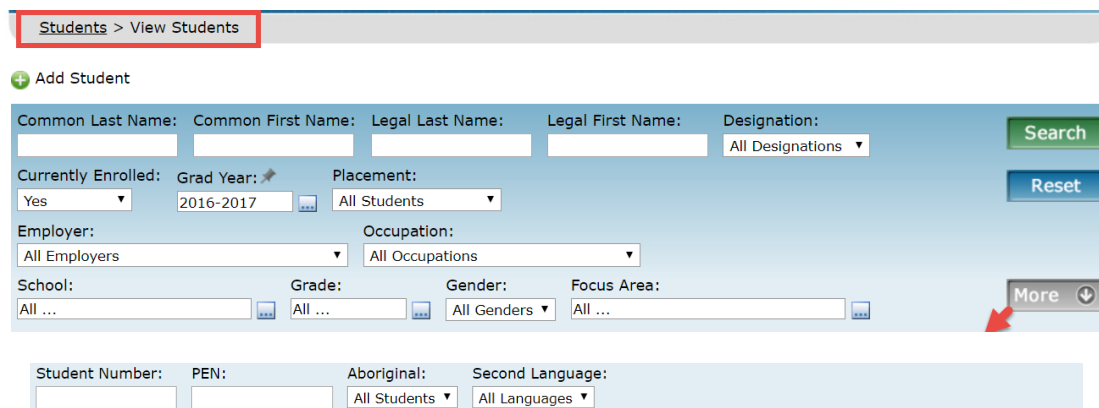
Filter Box

On pages that allow searching, myWEX displays a self-contained blue filter box with all the searchable criteria. Searching should always be thought of as "filtering". The fewer filters selected, the broader the range of data returned. Filter elements are generally a combination of multi-select options, dropdowns, and free-form text search boxes.

- Filter boxes can be very simple, with only a few filter criteria.



- Filter boxes can also be more sophisticated. In some filter areas, a "More" button is presented which will open additional fields for filtering.



- **Searching:** Once all filter criteria have been selected, the search can be initiated in one of two ways:
 - By clicking the **Search** button.
 - By pressing the ENTER key from any text box.
- **Resetting:** It is certainly possible to generate zero results if the blue filter box is too specific. The filter box can be set back to its original state by clicking the **Reset** button.
- **Sticky Selections:** myWEX contains a some elements within the blue filter boxes that are considered “sticky”. Choices made in these multi-select fields are remembered during subsequent logins from the same computer as search criteria. Furthermore, these sticky selections will be carried through to other screens in the application. For example, if working with the 2018-2019 and 2019-2020 Grad Years concurrently in the View Students filter box, myWEX will remember this selection when viewing statistics in the Home screen.

[Students](#) > View Students

+ Add Student

Common Last Name:	Common First Name:	Legal Fir
Currently Enrolled:	Grad Year:	Placement:
Yes	2016-2017	All Students

Push pin indicates a "sticky" field.

6.0 The Home Menu

Alerts

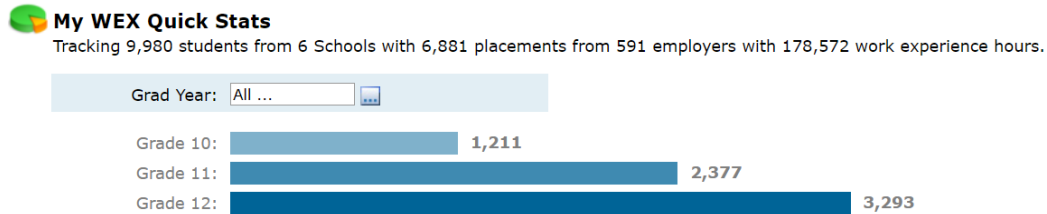
Alerts may display if they have been recorded on student or employer memos for follow-up. See *Managing the Student Record* and *Managing the Employer Record* sections of this guide for information on adding memos with alerts.

Alerts

STUDENT MEMO - Anne Abbott (December 13, 2019) - [Must complete WHMIS](#)

MyWEX Quick Stats

Quick stats provide the user with an overview of work experience program participation. Stats can be refined by using the multi-select option to choose one or multiple years in the Grad Year field.



Date Sensitive Information

This section of the home screen displays a quick view of new and updated information, including action items such as employer workflows.

 **Date Sensitive Information**

- [Current Placements:](#) 2 students are currently on a job placement.
- [Upcoming Placements:](#) 0 students are scheduled to start a job placement in the next 7 days.
- [Employer Workflow:](#) 1 submitted in the past 7 days.
- [New Employers:](#) 0 active employers added in the past 7 days.

School Level User Notice

These may appear on the Home screen for users with Level 2 access if setup in *Admin > System Settings*.

School Level User Notice

This message is set up in Admin > System Settings > Message for School Level Users and will appear for users with a Level 2 security role.

7.0 Setting Up myWEX

Admin > Manage Activity Types

Activity types can be added to reflect the needs of the work experience program. For example, job shadow, campus tour, etc. Activity types are added to employers.

+ Add Activity Type	
Type Description	Short description of the activity type.
Default Type	Set to Yes if this activity should automatically populate the activity type field when a new activity is added. The activity type can be changed if this default is not the appropriate one.

Screen fields to consider are in the numbered order below.

Admin > Manage Activity Types > Activity Type Details **1**

New Activity Type Details

Type Description: * Job Shadow **2** ALPHANUMERIC VALUES AND SPACE ONLY

Default Type: No **3** AUTOMATICALLY SELECTED WHEN ADDING NEW ACTIVITY

Back Create Activity Type **4**

Admin > Manage Designations

Designations can be added according to the business practice of the work experience program. For example, to create categories that can be assigned to students.

+ Add Designation ☐ Show Inactive	
Code	Short code for the designation
Description	Description of the designation

Screen fields to consider are in the numbered order below.

Admin > Manage Designations > Designation Details **1**

New Designation Details

Code: * Bus-Off Mgmt **2**

Description: Business - Office Management **3**

Back Create Designation **4**

Admin > Manage Focus Areas

In addition to the out-of-the-box focus areas, work experience programs can add custom focus areas that are relevant to organizing students by focus area.

Check **Show Inactive** before adding a new focus area to ensure there is not a pre-existing record that can be set to Active.

+ Add Focus Area ☐ Show Inactive	
Code	Short code for the focus area
Title	Title of the focus area
Description (optional)	Short description of the focus area.

Screen fields to consider are in the numbered order below.

Admin > Manage Focus Areas > Focus Area Details 1

New Focus Area Details

Code: * HS 2

Title: * Health Services 3

Description: Health Services 4

Back Create Focus Area 5

Admin > Manage Languages

Languages can be assigned to employers as part of their requirement for taking a student placement. Organizations can create additional languages to the out-of-the-box list, as required.

+ Add Language	
Language Description	Name of the language being added

Screen fields to consider are in the numbered order below.

Admin > Manage Languages > Language Details 1

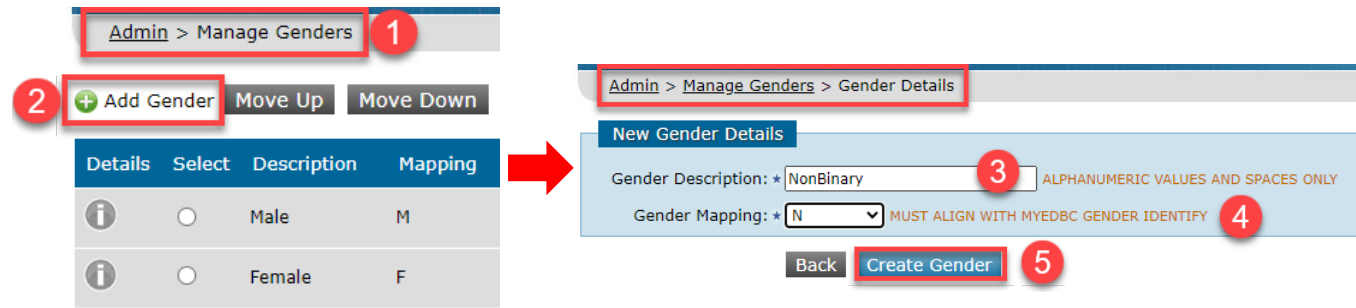
New Language Details

Type Description: * Gaelic 2 ALPHANUMERIC VALUES AND SPACE ONLY

Back Create Language 3

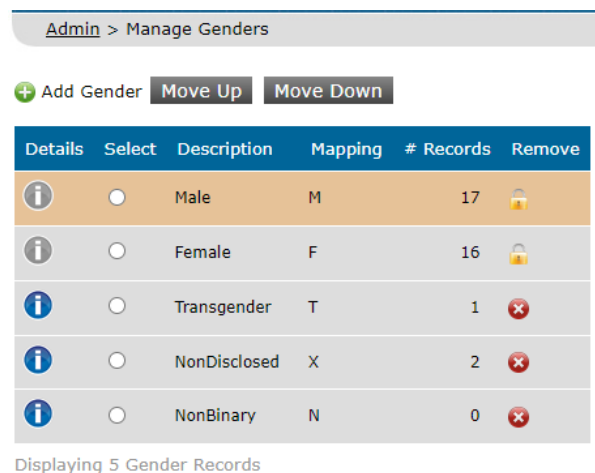
Admin > Manage Genders

Manage Genders allows school boards to define their own gender list in myWEX. These genders must be aligned with the *Gender Identity* table in MyEducation BC so values will import properly to myWEX.



The screenshot shows the 'Admin > Manage Genders' page. On the left, there is a table with columns: Details, Select, Description, and Mapping. It lists 'Male' (M) and 'Female' (F). A red box highlights the '+ Add Gender' button, labeled with a red circle '2'. A red arrow points from this button to the 'New Gender Details' form on the right. The form has a breadcrumb 'Admin > Manage Genders > Gender Details' (labeled with a red circle '1'). It contains two fields: 'Gender Description: *' with the value 'NonBinary' (labeled with a red circle '3') and 'Gender Mapping: *' with a dropdown set to 'N' (labeled with a red circle '4'). Below these fields are 'Back' and 'Create Gender' buttons (labeled with a red circle '5').

When complete, the gender table will display all genders for use in myWEX.



The screenshot shows the 'Admin > Manage Genders' page with a table displaying 5 gender records. The table has columns: Details, Select, Description, Mapping, # Records, and Remove. The records are: Male (M, 17 records), Female (F, 16 records), Transgender (T, 1 record), NonDisclosed (X, 2 records), and NonBinary (N, 0 records). Below the table, it says 'Displaying 5 Gender Records'.

Details	Select	Description	Mapping	# Records	Remove
	☐	Male	M	17	
	☐	Female	F	16	
	☐	Transgender	T	1	
	☐	NonDisclosed	X	2	
	☐	NonBinary	N	0	

If a gender exists in the MyEducation BC *Gender Identity* table that is not in myWEX, myWEX will still import the student, but will not be able to set the gender properly. This can be corrected by:

- Adding the unrecognized gender to Admin > Manage Genders in myWEX.
- Run the Admin > Import Students function again to update the record.

Some Preferred Genders Were Not Recognized

The "Preferred Gender" values below were not recognized since there was no associated gender mapping in ADMIN > MANAGE GENDERS. the genders have been correctly aligned.

Preferred Gender Value	Details
S	not recognized in myWEX

Admin > Manage Letters

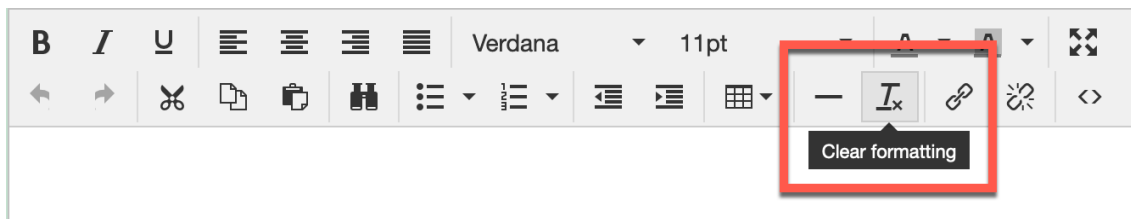
Manage Letters provides the ability to create a library of custom letters, work experience agreements, employer inspection forms, etc.

Manage Letters allows international programs to create an unlimited library of form letters and labels that can be targeted to student, placement or employer. Manage Letters functionality provides the ability to:

- Set a target to run the letter or label from the Student menu, Placement details, or Employer menu.
- Customize letters and labels with merge tags that insert personalized information.
- Efficiently generate letters or labels with personalized information for multiple targets at once.
- Easily copy letters for multiple versions.

Important notes when using the letter editor

- When copying text from an existing Microsoft Word document, it is strongly recommended to cleanse the text of formatting before pasting into the myWEX letter editor. To do this:
 - a. Highlight and copy text from Microsoft Word.
 - b. Paste the text into the letter editor and use the Clear formatting icon in the letter editor tool bar.
 - c. Format text as desired *within the myWEX letter editor*.



IMPORTANT: Do not copy paste tables from Microsoft Word or PDFs and paste into myWEX. Tables must be created from scratch via the myWEX letter editor in order to function correctly.

- Merge tags that are inserted into the body of the letter do not always inherit the current font and style of the surrounding text. Ensure the correct font and size is applied to the entire document by highlighting all text and applying the font and size *after* merge tags are inserted.
- Standard keyboard shortcuts are available within the myWEX letter editor.

Operation	Windows Keyboard Shortcut	Mac Keyboard Shortcut
Select All	CTRL + A	Command + A
Copy	CTRL + C	Command + C
Paste	CTRL + V	Command + V
Cut	CTRL + X	Command + X
Undo	CTRL + Z	Command + Z

Merge Tag Categories

Category	What Type of Fields are in the Category?	Where does the data come?
Emergency Contact	Emergency contact details, including name, address, contact information.	Students > View Students > Student Details > Contacts tab > Contact Details where the contact has a Relation of Emergency
Employer	Employer details, such as name, address, phone number, primary contact.	Employer > View Employers > Employer Details > Basic tab >
Miscellaneous	Various useful fields such as current date, new page tag, Admin signatures to display on letters.	Signatures are loaded in Admin > System Settings > Upload Admin Signature and Upload Admin Signature #2 fields.
Placement	Placement details from student placement records.	Students > View Students > Student Details > Placements tab.
Primary Parent	Parent contact details, including name, address, and contact information.	Students > View Students > Student Details > Contacts tab > Contact Details where the Parent Contact field is Yes and the Primary Parent flag is Yes .
School	School name, address, contact information.	Admin > Manage Schools > School Details
Secondary Contact	Contact details, including name, address, and contact information.	Students > View Students > Student Details > Contacts tab > Contact Details where the Parent Contact field is Yes and the Primary Parent flag is No .
Student	Student demographics, including pronoun options. Also includes Both Parent Names option	Students > View Students > Student Details > various tabs in the student record.

Admin > Manage Letters > Letter Details 1

New Letter Details

Letter Name: * Placement Letter 2

Target: * Student 3

Top Margin: System Settings Banner First Page 4

Orientation: Portrait 5

B I U [align icons] Verdana 11pt [font color icon] [background color icon] [link icon] [unlink icon] [code icon]
 [undo icon] [redo icon] [cut icon] [copy icon] [paste icon] [list icon] [table icon] [table border icon] [table border style icon] [table border width icon] [table border height icon] [table border color icon] [table border style icon] [table border width icon] [table border height icon] [table border color icon]

Congratulations, you have a work experience placement at [employername] beginning on [placementstartdate].] 6

p Words: 12

MERGE TAGS: Placement - Select Tag -

Back Create Letter 7

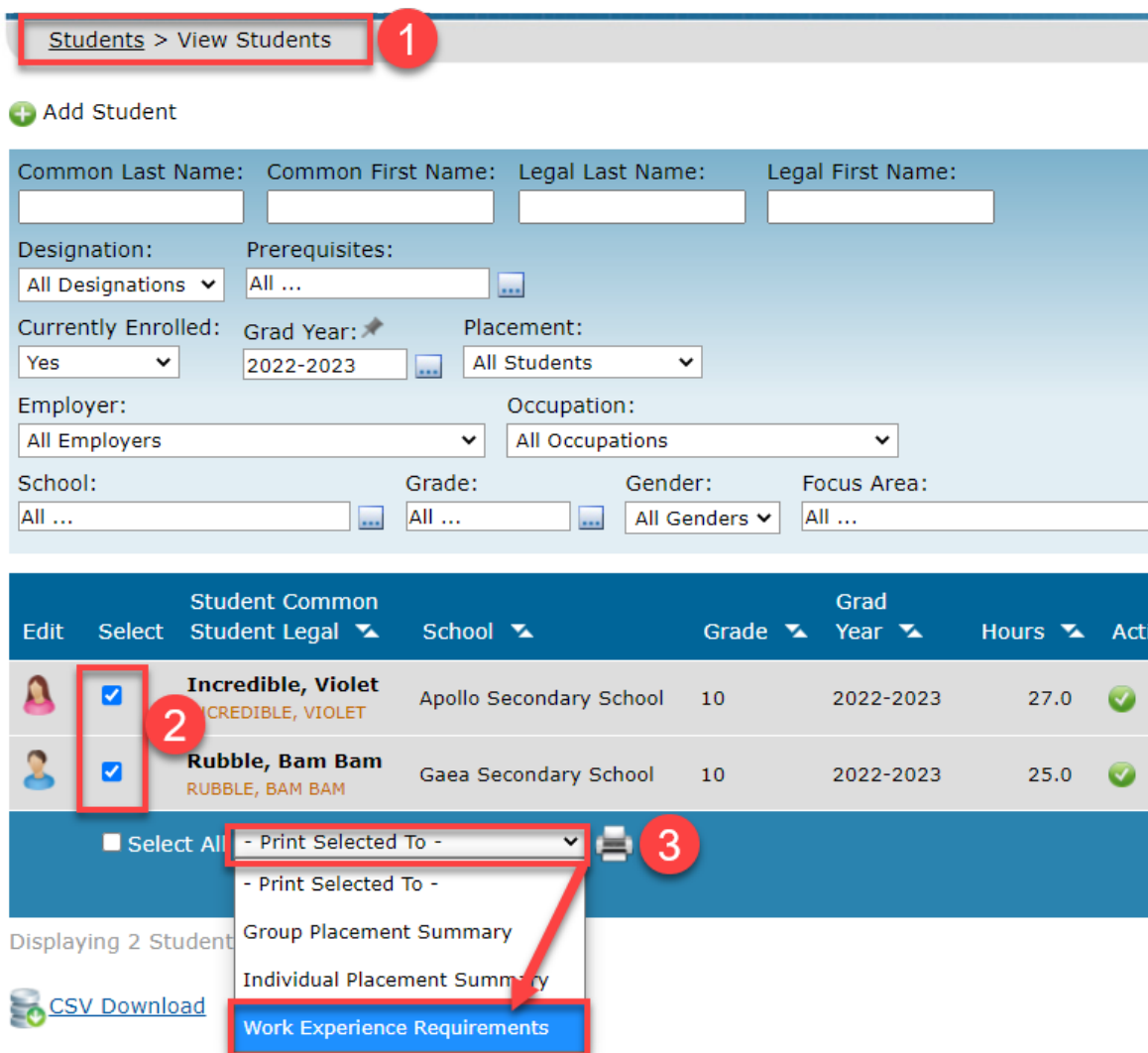
+ Add Letter	
Letter Name	Short descriptive name for this letter
Target	Select the target audience for this letter: • Employer: runs from Employers > View Employers • Placement: runs from Placement details • Student: runs from Students > View Students
Top Margin	• System Settings Banner: Use the program banner loaded into Using Tables in Letters: > System Settings > Current Banner field. Letterhead paper is not required. • System Settings Top Margin: Use the margin spacing set in Using Tables in Letters: > System Settings > Top Print Margin field so this letter prints appropriately on pre-printed letterhead.
Orientation	• Portrait: Letter will generate in portrait mode. • Landscape: Letter will generate in landscape mode.
Text box	Enter letter content. Note that merge tag categories can be used to draw information from data fields, so the letter is personalized.
Active: Once a record is created, this selection appears so a letter can be set to Inactive at a future date if no longer needed.	

Generating Letters

Letters can be generated from the following locations:

- **Students > View Students:** where the letter has a target of Student.
- **Students > View Students > Student Details > Placements** tab: where the letter has a target of Placement.
- **Employers > View Employers:** where the letter has a target of Employer.

1. Navigate to the relevant menu.
2. Select the records for which to generate the letter.
3. In the Print Selected To dropdown, select the letter to be generated. A new web browser window will open. Use print commands to save to PDF or send to printer.



1 Students > View Students

+ Add Student

Common Last Name: Common First Name: Legal Last Name: Legal First Name:

Designation: All Designations ▾ Prerequisites: All ...

Currently Enrolled: Yes ▾ Grad Year: 2022-2023 Placement: All Students ▾

Employer: All Employers ▾ Occupation: All Occupations ▾

School: All ... Grade: All ... Gender: All Genders ▾ Focus Area: All ...

Edit	Select	Student Common	Student Legal	School	Grade	Grad Year	Hours	Act
	☒	Incredible, Violet	INCREDIBLE, VIOLET	Apollo Secondary School	10	2022-2023	27.0	
	☒	Rubble, Bam Bam	RUBBLE, BAM BAM	Gaea Secondary School	10	2022-2023	25.0	

■ Select All

Displaying 2 Student

CSV Download

- Print Selected To -

- Print Selected To -

Group Placement Summary

Individual Placement Summary

Work Experience Requirements

2

3

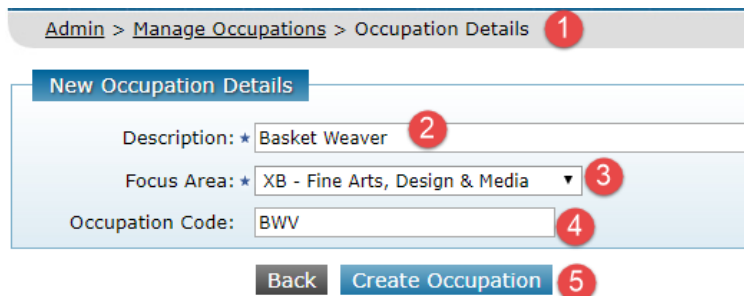
Admin > Manage Occupations

These represent National Occupation Codes (NOC).

Check **Show Inactive** before adding a new occupation code to ensure there is not a pre-existing record that can be set to Active.

+ Add Occupation ☐ Show Inactive	
Description	Enter a description of the new occupation code.
Focus Area	Enter the focus area that applies to this occupation.
Occupation Code	The preloaded list is a National Occupation Codes list. Local codes may be added as needed.
Active: Once a record is created, this selection appears so a record can be set to Inactive at a future date if no longer needed.	

Screen fields to consider are in the numbered order below.



Admin > Manage Occupations > Occupation Details **1**

New Occupation Details

Description: * Basket Weaver **2**

Focus Area: * XB - Fine Arts, Design & Media **3**

Occupation Code: BWV **4**

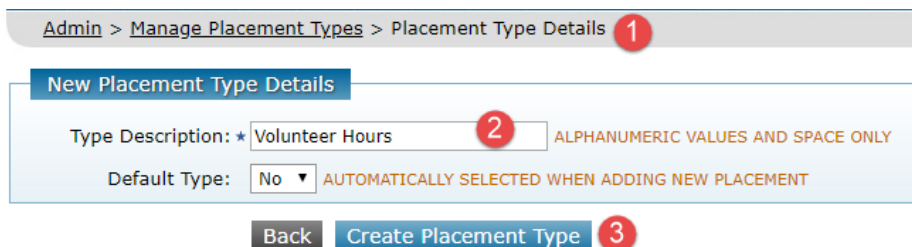
Back Create Occupation **5**

Admin > Manage Placement Types

Placement types can be customized to reflect the unique needs of the work experience program.

+ Add Placement Type	
Type Description	Enter a description of the placement type.

Screen fields to consider are in the numbered order below.



Admin > Manage Placement Types > Placement Type Details **1**

New Placement Type Details

Type Description: * Volunteer Hours **2** ALPHANUMERIC VALUES AND SPACE ONLY

Default Type: No **3** AUTOMATICALLY SELECTED WHEN ADDING NEW PLACEMENT

Back Create Placement Type **3**

Admin > Manage Prerequisites

Prerequisites created here can be assigned to employers as requirements of placement. Prerequisites are also added to students as they are completed. Example: An employer may require a WHMIS prerequisite, so this would be added to the employer record. It would also be added to a student record when the student has completed WHMIS training.

Check **Show Inactive** before adding a pre-requisite to ensure there is not a pre-existing record that can be set to Active.

+ Add Prerequisite ☐ Show Inactive	
Description	Enter a description of the pre-requisite
Date Required:	Select Yes if a date on which the pre-requisite is achieved is required. For example, the flu shot needs to be renewed each year, so a date of when the student got their flu shot would be entered.
Active	Set to Active if this pre-requisite is currently used for employers and/or students.
Notes (optional)	The Notes field can be used to record additional information about the prerequisite.
Active: Once a record is created, this selection appears so a record can be set to Inactive at a future date if no longer needed.	

Screen fields to consider are in the numbered order indicated in the screenshot.

Admin > Manage Prerequisites > Prerequisite Details **1**

New Prerequisite Details

Description: * **2**

Date Required: **3**

Notes: **4**

463 available characters

[Back](#) [Create Prerequisite](#) **5**

Admin > Manage Schools

Schools managing work experience programs can be added to this list. Once the school record is created, a school coordinator may be assigned, if the staff member exists in Admin > Manage Users.

Check **Show Inactive** before adding a school to ensure there is not a pre-existing record that can be set to Active.

+ Add School ☐ Show Inactive	
School Name	Enter full school name.
School Code	Enter the school's short code or acronym.
SIS School Code	Must match the BC Ministry of education school ID for the student import utility to work.
Principal	Enter name of the school principal.
Address, City, Province, Postal Code	Enter school's address information.
Telephone, Fax	Enter school's telephone and fax (if applicable).
Web (optional)	Enter school's website address

Note: Once "Create School" has been clicked, returning to the school details will display two additional fields:

- **Coordinator:** A school coordinator can be selected from the list if there are users assigned to the school in Admin > Manage Users.
- **Active:** Once a record is created, this selection appears so a record can be set to Inactive at a future date if no longer needed.

See screenshot below.

Admin > Manage Schools

New School Details

School Name: * Delos Secondary School 1

School Code: * DSS 2

SIS School Code: 23231017 3 REQUIRED MATCH FOR IMPORTING STUDENT DATA

Principal: Dr. Seuss 4

Address: 123 Any St 5

City: Creston 6

Province: British Columbia 7

Postal Code: V1X 32T 8

Telephone: 250-888-9875 XXX XXX-XXXX 9

Fax: 250-888-1234 XXX XXX-XXXX 10

Web: http://www.exploremynation.ca/ 11

Back Create School 12

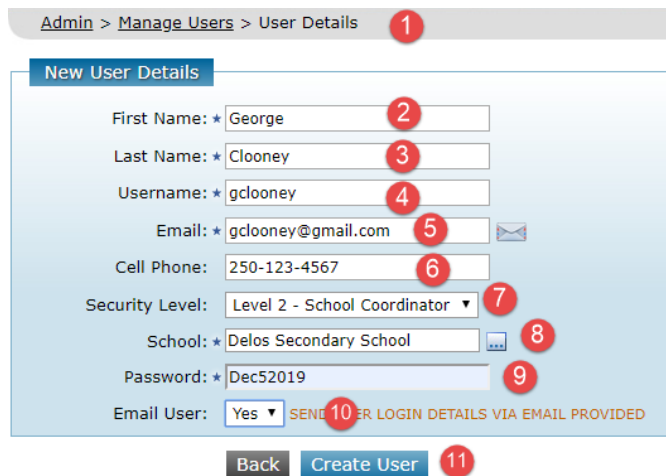
Admin > Manage Users

Manage Users creates accounts and assigns security roles as appropriate for a staff role in the work experience program. Additional privileges can be assigned to users with **Level 2 – School Coordinator** Admin > Systems settings > Security. It should be noted that these additional privileges apply to *all* users with the role of Level 2 – School Coordinator, not individual users.

Check **Show Inactive** before adding a new school to ensure there is not a pre-existing record that can be set to Active.

+ Add User	
First Name & Last Name fields	First and last name of user.
Username	Enter a username for the new user.
Email and Cell Phone fields	Enter a valid email address in the email field and a valid phone number in the Cell Phone field, if needed.
Security Level:	Assign a security level to the new user, based on their role. - Lookup roles can view information, but not edit information. - Coordinator roles can view and change information at the level assigned to them (school or district).
School	Assign one or multiple schools to the user, as appropriate to their role.
Password	Enter an initial password for the user. Upon logging in, the new user should go to “User Settings” in the upper banner and change their password.
Email User	On initial account creation, setting this field to Yes will automatically generate an email to the user with their username and password.
Last Login:	This field will appear after the user is created to show when they last logged into myWEX.

Screen fields to consider are in the numbered order below.



The screenshot shows the 'New User Details' form within the 'Admin > Manage Users > User Details' navigation path. The form fields are numbered 1 through 11 as follows:

1. Admin > Manage Users > User Details (breadcrumb)
2. First Name: * George
3. Last Name: * Clooney
4. Username: * gclooney
5. Email: * gclooney@gmail.com
6. Cell Phone: 250-123-4567
7. Security Level: Level 2 - School Coordinator
8. School: * Delos Secondary School
9. Password: * Dec52019
10. Email User: Yes (with a link: SEND USER LOGIN DETAILS VIA EMAIL PROVIDED)
11. Create User button

Additional elements include a 'Back' button and a 'SEND USER LOGIN DETAILS VIA EMAIL PROVIDED' link.

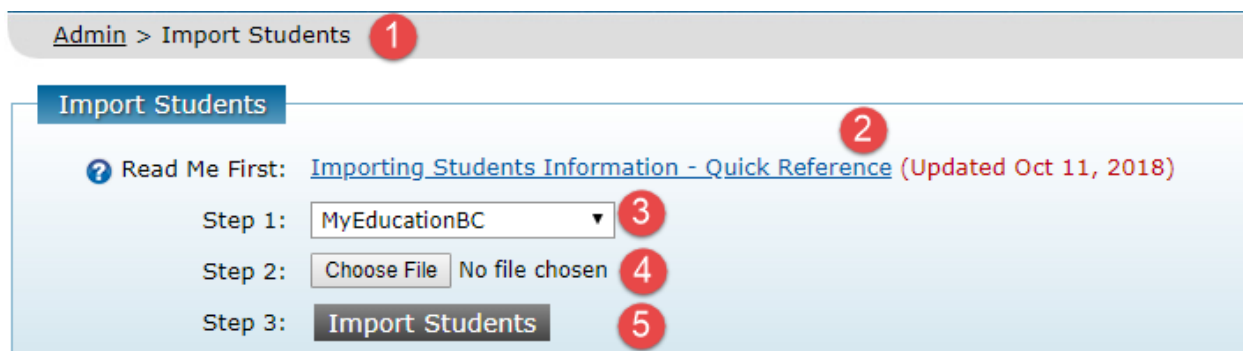
Import Students

Students can be imported from student information systems as per the instructions in the *Importing Students Information – Quick Reference* guide in the Read Me First section of the screen.

Note: The import is non-destructive. This means if a field on a student record in myWEX has been manually populated and that same field in MyEd BC is blank, the manually populated value will not be overwritten by the MyEd BC import.

Read Me First	Click on the blue hyperlink for the <i>Importing Students Information – Quick Reference</i> to learn the setup required in MyEducation BC for exporting the student data. Once the data has been extracted to the appropriate file type, continue to the next steps.
Step 1	Select MyEducation BC.
Step 2	Click the Choose File button to browse to the location of the extract to be uploaded.
Step 3	Click the Import Students button to complete the import.

Screen fields to use are in the numbered order below.



The screenshot shows the 'Import Students' interface. At the top, a breadcrumb trail reads 'Admin > Import Students' with a red circle containing the number 1 next to 'Import Students'. Below this is a blue header bar with the text 'Import Students'. To the right of the header bar is a red circle containing the number 2. Below the header bar, there is a section titled 'Read Me First:' followed by a blue hyperlink 'Importing Students Information - Quick Reference' and the text '(Updated Oct 11, 2018)'. Below this, there are three steps: 'Step 1:' followed by a dropdown menu showing 'MyEducationBC' with a red circle containing the number 3 next to it; 'Step 2:' followed by a 'Choose File' button and the text 'No file chosen' with a red circle containing the number 4 next to it; and 'Step 3:' followed by an 'Import Students' button with a red circle containing the number 5 next to it.

System Settings

System Settings is where myWEX program banners and administrator signatures can be added to automatically appear at the top of letters and forms.

Print Settings: Current Banner	Click Choose File to upload a banner to be used as letterhead for letters and forms.
Print Settings: Current Admin Signature Upload Admin Signature #2	Click Choose File to upload an admin signature to be used as letterhead for letters and forms. Current Admin Signature: corresponds with the merge tag Admin Signature Upload Admin Signature #2: corresponds with the merge tag Admin Signature #2
Top Print Margin	If not using a system banner, this field can be set to leave space at the top of a letter for letterhead. This would eliminate the need to leave several blank rows at the top of the letter when designing it.
Notices: Message for School Level Users	This will display a message on the Home screen for all users with a Level 2 user access.
Security	These fields can be used to give additional access to Level 2 users.
See screenshots below	

Admin > System Settings

Print Settings

Current Banner: [printbanner.jpg](#) ☐ Remove
 Upload Banner: No file chosen HIGH RESOLUTION RECOMMENDED, MUST BE IN JPG FORMAT

Current Admin Signature: [adminsinsignature.jpg](#) ☐ Remove
 Upload Admin Signature: No file chosen HIGH RESOLUTION RECOMMENDED, MUST BE IN JPG FORMAT

Upload Admin Signature #2: No file chosen HIGH RESOLUTION RECOMMENDED, MUST BE IN JPG FORMAT

Top Print Margin: FOR PRE-PRINTED LETTERHEAD (IN INCHES)

Notices

Message for School Level Users:

B I U

tests

Words: 1

Security

L2 Add Student: ALLOW LEVEL 2 USERS TO ADD STUDENTS
L2 Submit Employer: ALLOW LEVEL 2 USERS TO CREATE AND SUBMIT NEW EMPLOYERS (DISTRICT APPROVAL WORKFLOW)
L2 Edit Exclusive Employers: ALLOW LEVEL 2 USERS TO EDIT EMPLOYERS MARKED AS EXCLUSIVE TO THEIR SCHOOL
L2 Edit All Employers: ALLOW LEVEL 2 USERS TO EDIT ALL EMPLOYERS (CANNOT ADD, NAME AND STATUS LOCKED)
L2 Edit Activity Job Duties and Hours: ALLOW LEVEL 2 USERS TO EDIT DEFAULT ACTIVITY JOB DUTIES AND WORK HOURS
L2 Edit Activity Notes: ALLOW LEVEL 2 USERS TO EDIT ACTIVITY NOTES
L2 Edit Activity Certificates: ALLOW LEVEL 2 USERS TO EDIT ACTIVITY CERTIFICATES

Back Update System Settings

8.0 The Student Menu

View Students

The *View Students* screen provides a filter box so the user can search for one or more students based on selected criteria.

As explained in the *Filter Box* section of this guide, the *View Students* filter box contains a combination of:

- free-form entry search fields
- dropdowns and multi-select fields for isolating student records
- A  button that presents additional fields for more refined filtering

Remember: “Reset” can be used to clear selections if too many filters have been applied and the expected results are not returned. However, “sticky” fields (such as Grad Year with the push pin icon), are not reset.

The sample search in the screenshot below will return all students currently enrolled in the district, with a grad year of 2020-2021, an association to Zeus Secondary School, and a work placement.

Students > View Students

+ Add Student

Common Last Name: Common First Name: Legal Last Name: Legal First Name: Search
Designation: All Designations Prerequisites: All ... Reset
Currently Enrolled: Yes Grad Year: 2020-2021 Placement: With Placements Display All Placements: No
Employer: All Employers Occupation: All Occupations
School: Poseidon Secondary School Grade: All ... Gender: All Genders Focus Area: All ... More

Below the list of students, the user can select some, or all, of the students in the list and generate forms, perform actions, or download details for the selected records. Details on these functions are provided in the *Student Mass Actions* section of this guide.

Add Student - The Student Record

Normally, students are added to myWEX using the **Admin > Import Students** function, which exports data from the student admin system and imports it into myWEX. See the *Import Students* section of this guide for instructions. Using this function eliminates errors that may result from double-entering data in both systems.

If a student needs to be added manually, use the  **Add Student** button or the **Student > Add Student** menu option to generate a *New Student Details* screen.

Student Details

The data fields displayed in this screen are described in the table below.

Note: The student details at the top of the screen will display regardless of the information tab selected.

Student Details will display at the top regardless of the tab selected.	
Name fields	When Common Last and Common First Name values are entered, the Legal Last and Legal First Names will auto-populate for convenience. The fields can be changed, if different.
School, Grade, Grad Year	Select the student's current school, grade and year they are expected to graduate.
Gender and Birthdate	Populate the student's birthdate and select the appropriate gender. Note: Gender "X" or "Other" is not yet available in myWEX as the student information systems that populate myWEX have not been updated with these values for import.
Designation	This field can be used to categorize types of experiences students are participating in. The out-of-the-box values are: Job Training and Work Experience. Additional values can be added to Admin > Manage Designations.
Student Number	Populate the student's pupil number from the district student information system.
Click Add Student to create the record. This button becomes Update Student once the record has been created.	

New Student Details

Common Last Name: * Fowl

Common First Name: * Artemis

School: * Zeus Secondary School ▼

Grade: * 10 ▼

Grad Year: * 2021-2022 ▼

Birthdate: * September 1, 2009  AGE 10

Legal Last Name: * Fowl

Legal First Name: * Artemis

Gender: * Male ▼

Designation: Work Experience ▼

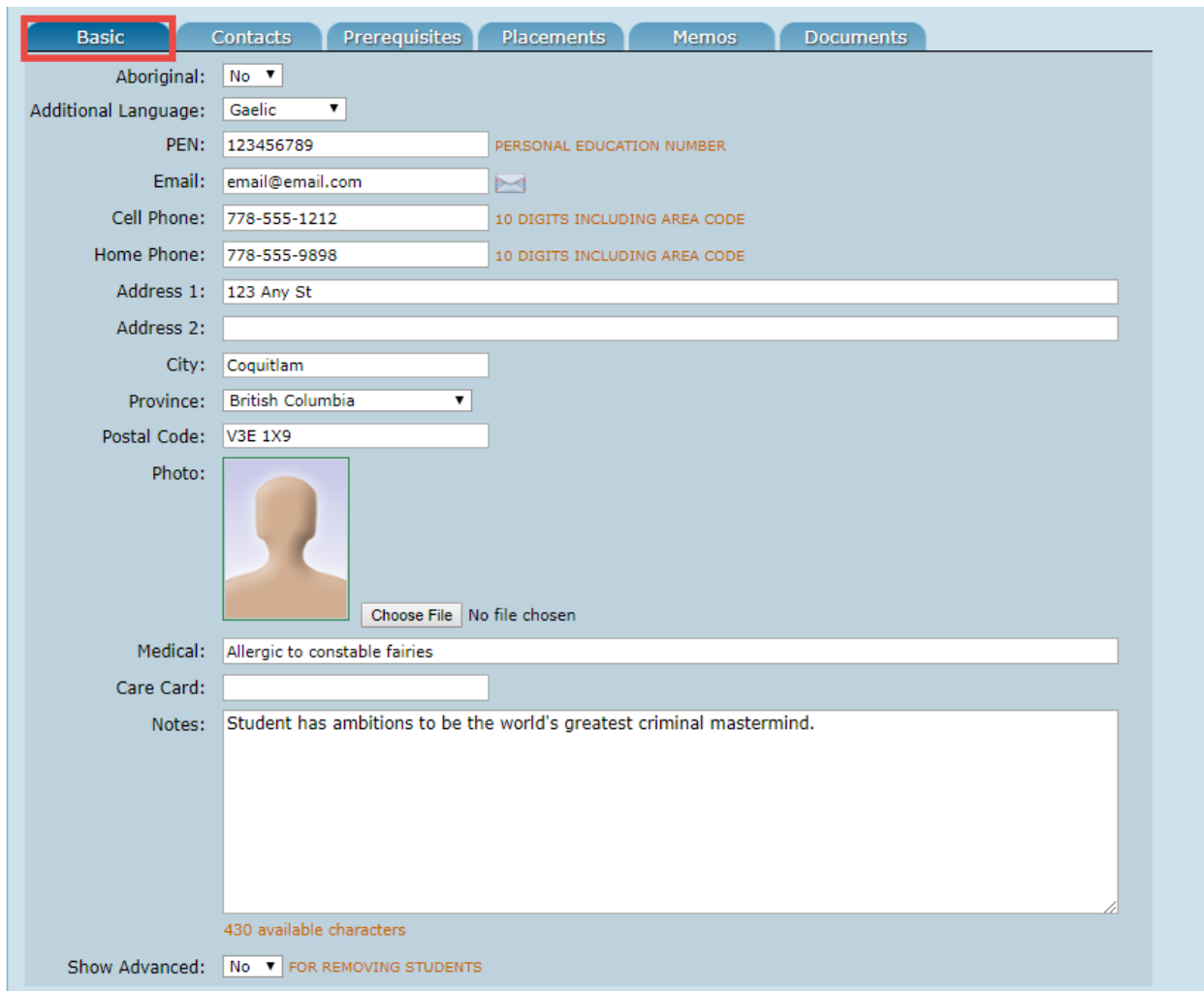
Focus Area: XA - Business & Applied Business ▼

Student Number: * 1265789

Basic Tab

The basic tab contains additional demographic fields relevant to the student. Most fields on this screen are self-explanatory, but some deserve special mention. All fields are extracted in the CSV download, except for the student photo and the *Notes* field.

- **Additional Language:** If the employer record indicates that a specific language is required for the placement at their work site and the student speaks that language, it can be added to the student. When a placement is made to the employer, the *Additional Language* indicator will show the student has the required additional language.
- **Medical:** This field can indicate if the student has any serious medical conditions.
- **Notes:** This field can be used to record any notes that may be relevant to placing a student for a work or volunteer opportunity.
- **Show Advanced:** This provides the ability to remove a student and all information related to their demographics and work placements. ***It is not recommended that this function be used without submitting a tech support request first.***



The screenshot shows the 'Basic' tab selected in the WEX interface. The form contains the following fields and values:

- Aboriginal:** No
- Additional Language:** Gaelic
- PEN:** 123456789 (PERSONAL EDUCATION NUMBER)
- Email:** email@email.com
- Cell Phone:** 778-555-1212 (10 DIGITS INCLUDING AREA CODE)
- Home Phone:** 778-555-9898 (10 DIGITS INCLUDING AREA CODE)
- Address 1:** 123 Any St
- Address 2:** (empty)
- City:** Coquitlam
- Province:** British Columbia
- Postal Code:** V3E 1X9
- Photo:** (Placeholder image with 'Choose File' button and 'No file chosen' text)
- Medical:** Allergic to constable fairies
- Care Card:** (empty)
- Notes:** Student has ambitions to be the world's greatest criminal mastermind. (430 available characters)
- Show Advanced:** No (FOR REMOVING STUDENTS)

Contacts Tab

The Contacts tab is used to record parent/guardian or emergency contacts for the student. As with basic student demographics, this information will be imported when the Admin > Import Students function is used.

If a record needs to be manually added the [+ Add Student Contact](#) button will generate a *New Student Contact Details* screen. Most fields on this screen are self-explanatory, with two exceptions:

- **Parent Contact:** Set to yes if the contact is a parent. When set to yes, an additional field will appear to indicate if this is the Primary Parent. Only one parent can be indicated as the primary and should be the parent that is most likely to be available for contact.
- **Notes:** Notes recorded for contacts are internal. Notes on contact records do not extract using the CSV Download function.

[Students](#) > [View Students](#) > [Student Details](#) > [Contact Details](#)

New Student Contact Details

Student Name:

Salutation: ▼

Last Name: *

First Name: *

Middle Name:

Relation: * ▼

Parent Contact: ▼ MAX 2

Primary Parent: ▼ NO CONTACT IS CURRENTLY ASSIGNED AS PRIMARY CONTACT

Birthdate: 

Email: 

Home Phone:

Cell Phone:

Work Phone: Ext:

Fax:

Address 1:

Address 2:

City:

Province: ▼

Postal Code:

Notes:

500 available characters

[Back](#) [Create Contact](#)

Prerequisites Tab

The prerequisites tab is used to record any training or certification the student has achieved. This is matched up to prerequisites required by an employer when a student is placed. If the student does not have the necessary pre-requisites, a red will appear beside the prerequisite when creating a placement for a student.

The prerequisites available in the dropdown list are created in Admin > Manage Prerequisites.

The screenshot shows the 'Prerequisites' tab selected in the top navigation bar. Below the tab, there is a section for 'Add Prerequisite' with a dropdown menu. The dropdown menu is open, showing a list of prerequisites: Criminal Record Check, Current Flu Shot, Food Save Level 1, Safety Training, TB Skin Test, and WHMIS. The 'Student' field is also visible next to the dropdown menu.

Placements Tab

The Placements tab is used to assign students to employers for placements. Clicking [+ Add Placement](#) will generate a *Student Placement Details* screen. Confirm the correct student is selected at the top.

1. In the **Employer Name** field, enter a portion of the employer's name that the student will be place with and click the [Search](#) button to display a list of employers that match the criteria.
2. Check the box beside the employer the student will be placed with to begin the placement process.

The screenshot shows the 'Student Placement Details' screen. The breadcrumb trail at the top reads: [Students](#) > [View Students](#) > [Student Details](#) > [Placement Details](#). The 'Student' field shows 'Abbott, Bonnie' from 'Athena Senior Secondary School, Grade 12' with a graduation date of 'GRADUATING 2014-2015'. The 'Employer' field has 'acme' entered, and the 'Search' button is highlighted with a red circle and the number 1. Below the search field, a table lists employers with a 'Select' checkbox. The first row shows 'aAcme' with a checked checkbox, highlighted with a red circle and the number 2. A 'Back' button is at the bottom.

Select	Employer Name	City	Address
☒	aAcme	Cityville	123 Maple Street

- A new screen will appear to display the general employer details that apply to this placement. Select the **Activity Type** and **Activity** for the student's placement with this employer.

Students > View Students > Student Details > Placement Details

Placement Details

Student: **Abbott, Bonnie**
Athena Senior Secondary School, Grade 12
GRADUATING 2014-2015

Employer: * aAcme Clear

Employer Address:
123 Maple Street
Cityville, British Columbia

Additional Language: French ⚠

Constraints:

Prerequisites:
⚠ Criminal Record Check
⚠ Current Flu Shot
⚠ Safety training

Activity Type: Work Placement ▼

Activity: - Select -
- Select -
Acme Another Activity - 123 Maple Street

3

- Additional information for the placement will be displayed. Populate the placement details as appropriate for this student/employer experience. Once completed, click the **Create Placement** button to create the record.

Basic **4**

Start Date: *

End Date: *

Teacher Contact: - Select - ▼

Teacher Email:

Teacher Cell Phone:

Teacher Monitor:

Occupation: Accounting (AN)

Job Duties:

Status: Active ▼

Placement Type: * WEX 12a ▼

Hours: 0.0

Working Days: 0

Placed By: Sys Admin

500 available characters

Work Hours
Arrangement:

500 available characters

Work Location:
 ☒ Same as Activity Address

Public Notes
 MAY BE INCLUDED IN WORK EDUCATION AGREEMENT

500 available characters

Private Notes
 OFFICE/INTERNAL USE ONLY

500 available characters

Back

Create Placement

Printing WEX Agreements

Once the placement has been created, clicking into the details of the placement will display a print option. This provides an opportunity to print placement details for individual students. Forms are set up in *Admin > Manage Letters > Target = Placements* for individual students.

Placement Details

Print:

- Select Print Option -



Start Date: *

- Select Print Option -

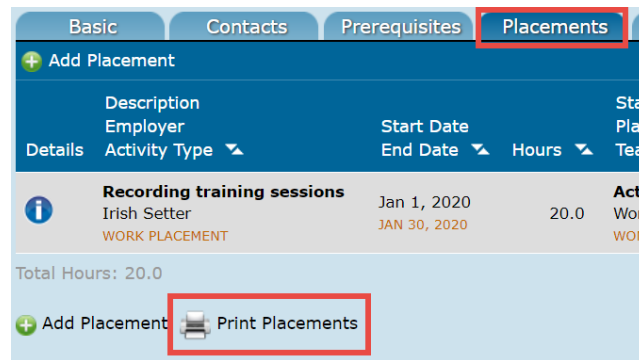
Active

End Date: *

Abbotsford Work Experience Agreement

* Work Experience

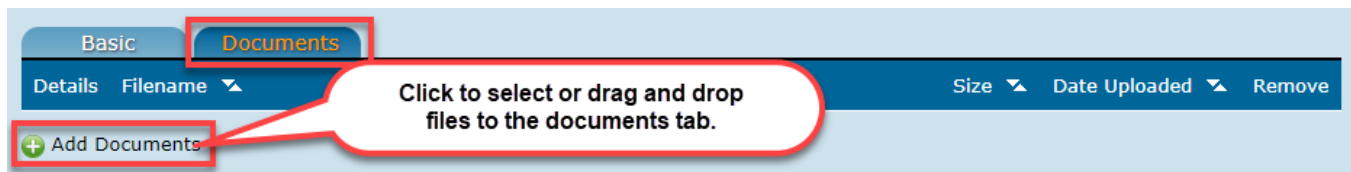
In the Placements tab, there is also a Print Placements button can be used to generate a placement summary for the student.



Adding Documents to a Placement

Once the placement has been created, a **Documents** tab will appear where the user can load documents relevant to the placement.

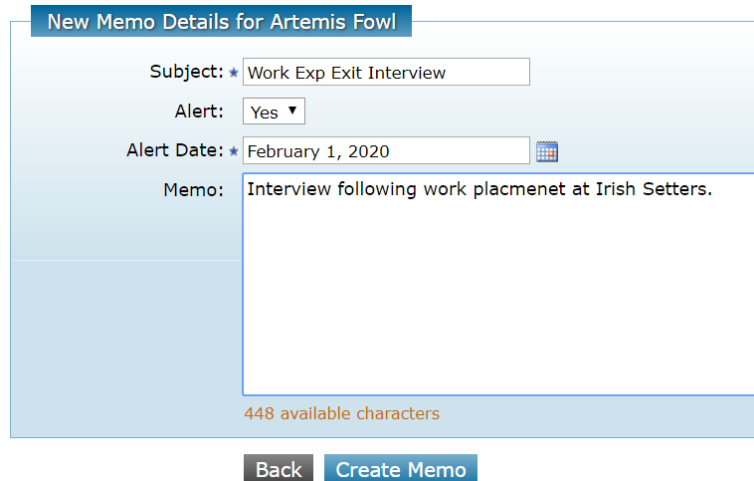
- **Add Document:** Provides the ability to load one document, chosen from a location on the user's computer.
- **Enhanced Add Documents:** Provides "drag-and-drop" ability for multiple files to the **Documents** tab.



Memos Tab

Memos can be created to track information on a student or their placements. Memos can also be set as an alert to appear on the home screen where follow-up on a student is required.

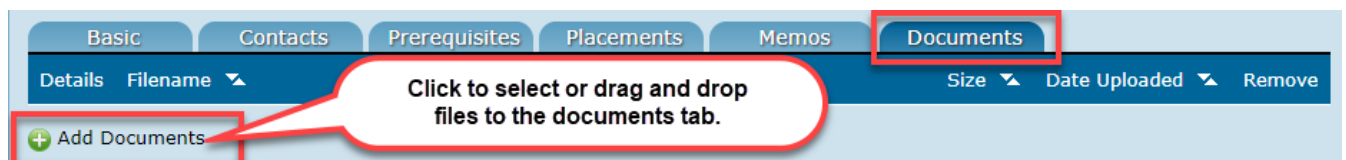
1. Use the **+ Add Memo** button to generate the *New Memo Details* screen.
2. Enter a brief subject area for the memo.
3. If the memo requires follow-up, set the Alert field to Yes. When the date field appears, select a date by which the memo by which the action should be taken.
4. Notes to provide additional detail may be entered here.
5. Click Create Memo to create the record.



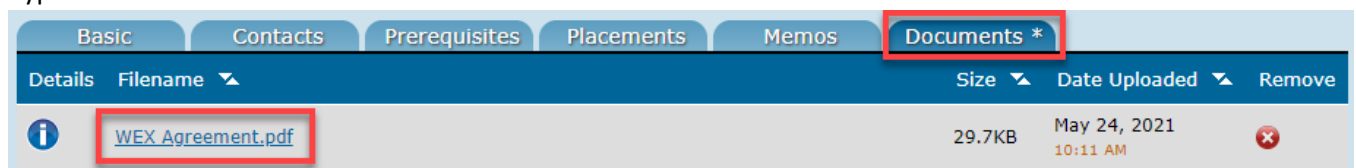
Documents Tab

The documents tab can be used to keep an electronic record of work experience agreements, volunteer hour logs, or any other information relevant to the student's work experience record. Maximum document size is 5 MB per document.

1. Use the **Add Document** or **Enhanced Add Documents** button to generate the *New Document Details* screen.
 - a. **Add Document:** click the **Choose File** button to browse the computer and select the file to upload. Click **Create Document** to add the finalize the upload.
 - b. **Enhanced Add Documents:** click to generate a drag-and-drop screen for one or multiple files. Click **Done** to finalize the upload.



2. The document(s) will now appear in the list in the Documents tab and may be viewed by clicking its blue hyperlink.



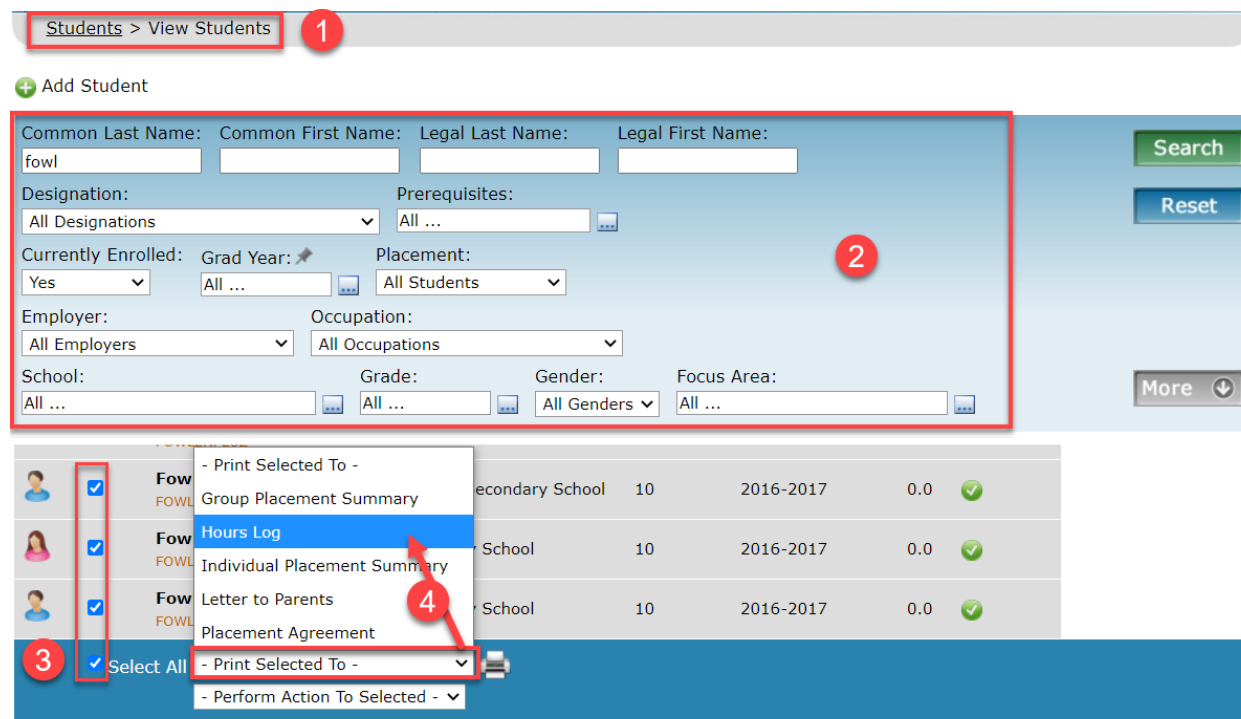
9.0 Student Mass Actions

Print Selected To

When filtering for students in **Students > View Students**, the user has the ability to generate placement summary reports or custom-designed letters for multiple students at once.

- **Group Placement Summary:** generates a single list of placement details for all selected students.
- **Individual Placement Summary:** generates a page per student of placement details.
- **Letters/Agreements:** generates letters for selected students set up in *Admin > Manage Letters > Category = Student*.

1. Go to **Students > View Students**.
2. Filter for the students requiring the same letter or to appear on the summary.
3. Select individual students in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Print Selected to** dropdown menu, select the report or letter to run.



Students > View Students

+ Add Student

Common Last Name: fowl Common First Name: Legal Last Name: Legal First Name:

Designation: All Designations Prerequisites: All ...

Currently Enrolled: Yes Grad Year: All ... Placement: All Students

Employer: All Employers Occupation: All Occupations

School: All ... Grade: All ... Gender: All Genders Focus Area: All ...

Search Reset More

Student	Common Last Name	Common First Name	Legal Last Name	Legal First Name	Designation	Prerequisites	Currently Enrolled	Grad Year	Placement	Employer	Occupation	School	Grade	Gender	Focus Area
☒	Fowl	FOWL	Secondary School	10	2016-2017	0.0	✓								
☒	Fowl	FOWL	School	10	2016-2017	0.0	✓								
☒	Fowl	FOWL	School	10	2016-2017	0.0	✓								

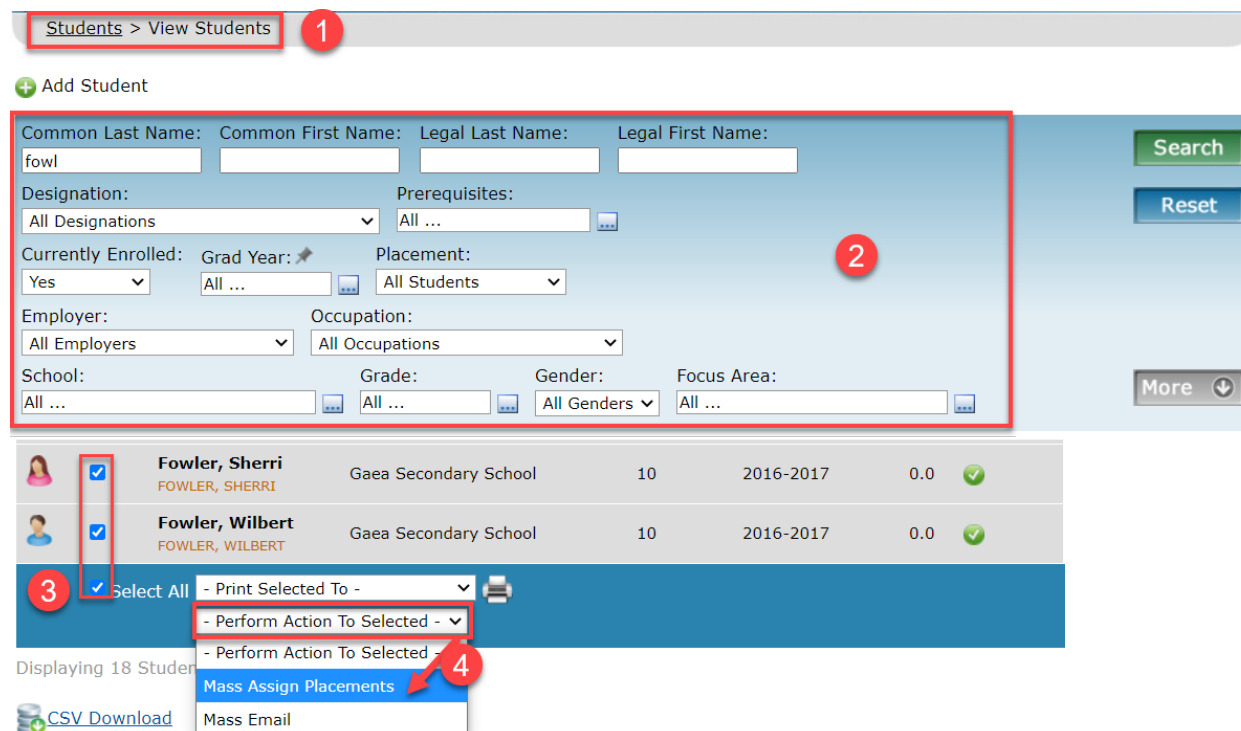
Displaying 18 Student Records

Perform Action to Selected

When filtering for students in **Students > View Students**, the user has the ability to mass assign placements or mass email students.

Mass Assign Placements

1. Go to **Students > View Students**.
2. Filter for the students requiring the same placement.
3. Select individual students in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Perform Action to Selected** dropdown menu, select **Mass Assign Placements**.
5. Enter the employer's name in the **Employer** field and click **Search**. A list of employers matching the search criteria will display.
6. Check the box beside the employer to receive these student placements.
7. Select the **Activity Type** and **Activity**.
8. Populate the details of the activity. Note that the details must be the same for all students selected to participate in this activity or individual exceptions must be manually adjusted after the Mass Placement action is completed.
9. Click Create Placement to assign the placement to all selected students.



The screenshot shows the 'Students > View Students' page. A red box labeled '1' highlights the breadcrumb navigation. Below it, a red box labeled '2' highlights the filter section, which includes fields for Common Last Name, Common First Name, Legal Last Name, Legal First Name, Designation, Prerequisites, Currently Enrolled, Grad Year, Placement, Employer, Occupation, School, Grade, Gender, and Focus Area. To the right of the filters are 'Search', 'Reset', and 'More' buttons. Below the filters is a table of students. A red box labeled '3' highlights the 'Select All' checkbox in the table. A red box labeled '4' highlights the 'Perform Action to Selected' dropdown menu, which is open and shows options: '- Print Selected To -', '- Perform Action To Selected -', 'Mass Assign Placements', and 'Mass Email'. The 'Mass Assign Placements' option is highlighted with a blue arrow. The table shows two students: 'Fowler, Sherri' and 'Fowler, Wilbert', both from 'Gaea Secondary School'.

Student	School	Grade	Year	Score	Status
Fowler, Sherri FOWLER, SHERRI	Gaea Secondary School	10	2016-2017	0.0	✓
Fowler, Wilbert FOWLER, WILBERT	Gaea Secondary School	10	2016-2017	0.0	✓

[Students](#) > [View Students](#) > Placement Details

Student Placement Details for:

Student	School ▼	Grade ▼	Grad Year ▼
Fowler, Sherri	Gaea Secondary School	10	2016-2017
Fowler, Wilbert	Gaea Secondary School	10	2016-2017

Placement Details

Employer: * 5

Select	Employer Name	City	Address
☐ 6	aAcme	Cityville	123 Maple Street

Placement Details

Employer: *

Employer Address:
123 Maple Street
Cityville, British Columbia

Constraints:

Activity Type: 7
Activity:

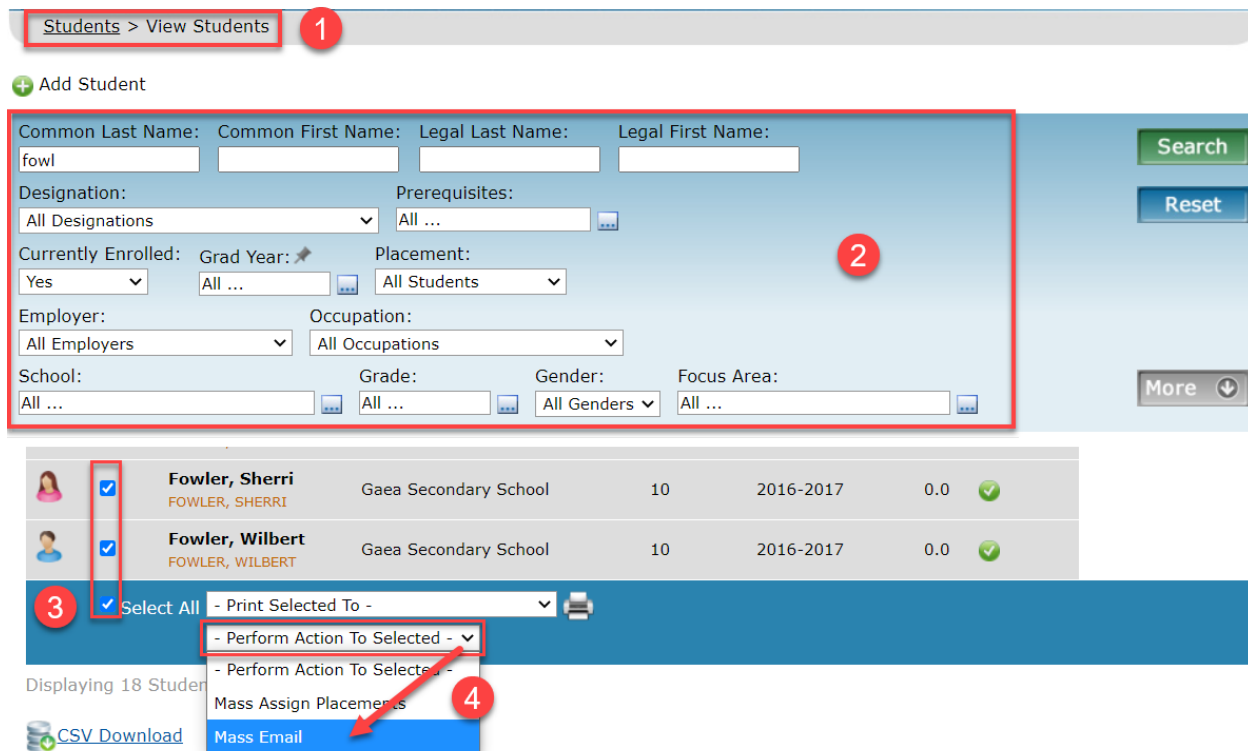
Basic 8

Start Date: * Calendar	Status: Active
End Date: * Calendar	Placement Type: * WEX 12a
Teacher Contact: - Select -	Hours: 0.0
Teacher Email:	Working Days: 0
Teacher Cell Phone:	Placed By: Sys Admin
Teacher Monitor:	
Occupation: Accounting (AN)	
Job Duties:	

9

Mass Email

1. Go to **Students > View Students**.
2. Filter for the students requiring the same email.
3. Select individual students in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Perform Action to Selected** dropdown menu, select **Mass Email**.
5. In the *Email Details* screen:
 - a. The *Details* link in the **To:** field can be used to confirm who the recipients are.
 - b. The **Carbon Copy** field can be used to cc the sender and anyone else who needs the content.
 - c. **Merge Tags** below the text box can be used to personalize the content of the message for the recipients.
 - d. The  icon can be used to attach documents to the email.
Remember that multiple recipients may be receiving this email, so attached documents should not contain personal information.
6. Enter a **Subject** for this email content.
7. Populate the message content in the text field. A variety of rich text tools are available to customize content as needed.
8. Click **Send Email** to deliver the message to recipients.



1 Students > View Students

+ Add Student

Common Last Name: fowl Common First Name: Legal Last Name: Legal First Name: Search

Designation: All Designations Prerequisites: All ... Reset

Currently Enrolled: Yes Grad Year: All ... Placement: All Students

Employer: All Employers Occupation: All Occupations

School: All ... Grade: All ... Gender: All Genders Focus Area: All ... More

2

	☒	Fowler, Sherri FOWLER, SHERRI	Gaea Secondary School	10	2016-2017	0.0	
	☒	Fowler, Wilbert FOWLER, WILBERT	Gaea Secondary School	10	2016-2017	0.0	

3 Select All

- Print Selected To -

- Perform Action To Selected -

- Perform Action To Selected -

Mass Assign Placements

4 Mass Email

Displaying 18 Students

CSV Download

Students > View Students > Email Details 5

New Email Details

To: 2 Recipients [\[DETAILS\]](#) a Click Details to view who the recipients' email addresses.

Subject: * WEX Requirements Meeting 6

From Name: * Sys Admin

From Email: * info@mywex.ca

b Carbon Copy: WILL RECEIVE A SUMMARY EMAIL

B I U Verdana 11pt **A** **A**

Dear [studentcommonfirstname],

You are required to attend a meeting at 12:30 p.m. on June 1st to learn about the work experience requirements for graduation. Please download the attached document to familiarize yourself with work experience expectations.

This meeting will be in Room 102 beside the counselling centre. See you there!

7

Career Counsellor

c Use student merge tags to personalize the content.

MERGE TAGS: Student - Select Tag -

Choose File WEX Agreement.pdf

d Use paper clip icon attach documents, if needed.

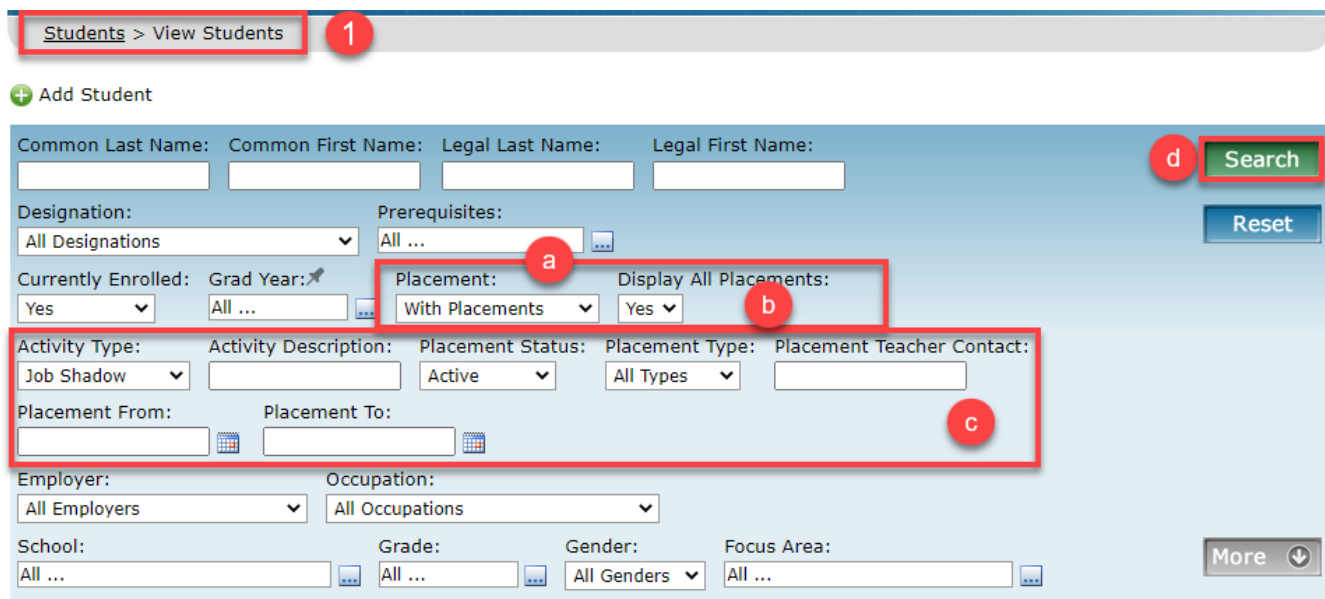
8

Back Send Email

Mass Update Placement Status

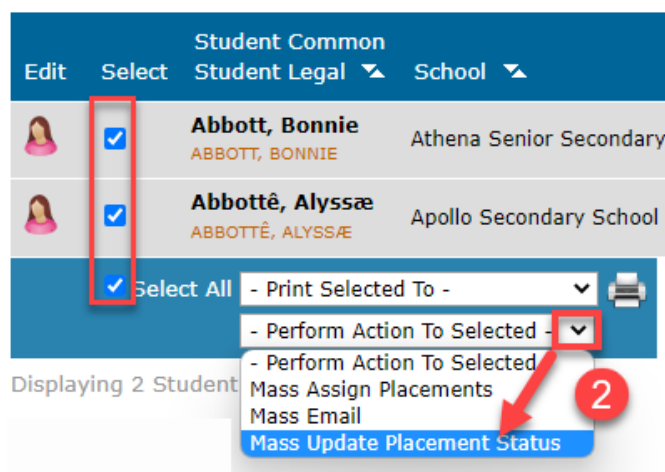
This new functionality allows myWEX users to mass update placement status when students have completed a placement!

1. In **Students > View Students**, use the filter box to search for students with placements.
 - a. Set the **Placement** filter to **With Placements**.
 - b. Set the **Display All Placements** filter to **Yes**.
 - c. Use the additional Activity and Placement filters to refine the list of students to those that need updating. Other filters can also be applied as needed.
 - d. Click **Search** to display the student placement records.



The screenshot shows the 'Students > View Students' filter box. A red box labeled '1' highlights the breadcrumb 'Students > View Students'. A red box labeled 'a' highlights the 'Placement' dropdown menu set to 'With Placements'. A red box labeled 'b' highlights the 'Display All Placements' dropdown menu set to 'Yes'. A red box labeled 'c' highlights the 'Activity Type' dropdown menu set to 'Job Shadow' and the 'Placement Status' dropdown menu set to 'Active'. A red box labeled 'd' highlights the 'Search' button.

2. Check the box beside the students to be updated. In the **Perform Action to Selected** options at the bottom of the list and choose **Mass Update Placement Status**.



The screenshot shows a list of students. A red box highlights the 'Select' column, where the checkboxes for 'Abbott, Bonnie' and 'Abbott, Alyssæ' are checked. A red box labeled '2' highlights the 'Perform Action to Selected' dropdown menu, which is open and shows the option 'Mass Update Placement Status' selected.

3. In the *Mass Update Placement Status* screen, use the **Change All Statuses To** dropdown to select the new status for all records in the list. When selected, all records in the list will display the new value.
4. Click **Update Status** to complete the action.

[Students](#) > [View Students](#) > Mass Update Placement Status

Update the placement statuses below:

Edit	Student Common Student Legal	Activity Description	Current Status	New Status	Activity Type	Start Date End Date
	Abbott, Bonnie ABBOTT, BONNIE	Zoo Helper	Active ▶	Active ▼	Job Shadow	Apr 30, 2021 APR 30, 2021
	Abbott, Alyssae ABBOTT, ALYSSAE	tester	Active ▶	Active ▼	Job Shadow	Apr 1, 2019 APR 4, 2019

Change All Statuses To - Select - ▼ 3

Back 4 **Update Status**

- Select -
- Select -
- Active
- Complete**
- Incomplete
- Cancelled
- Waitlist

CSV Download

The **CSV Download** allows the user to extract student details and placement information to a csv (comma separated values) file. Filter for the records to be included in the download and click the CSV Download link.

☐ Select All
 - Print Selected To - ▼
 

 - Perform Action To Selected - ▼

Displaying 18 Student Records


[CSV Download](#)
←

10.0 The Employer Menu

View Employers

The *View Employers* screen provides a filter box so the user can search for one or more employers based on selected criteria.

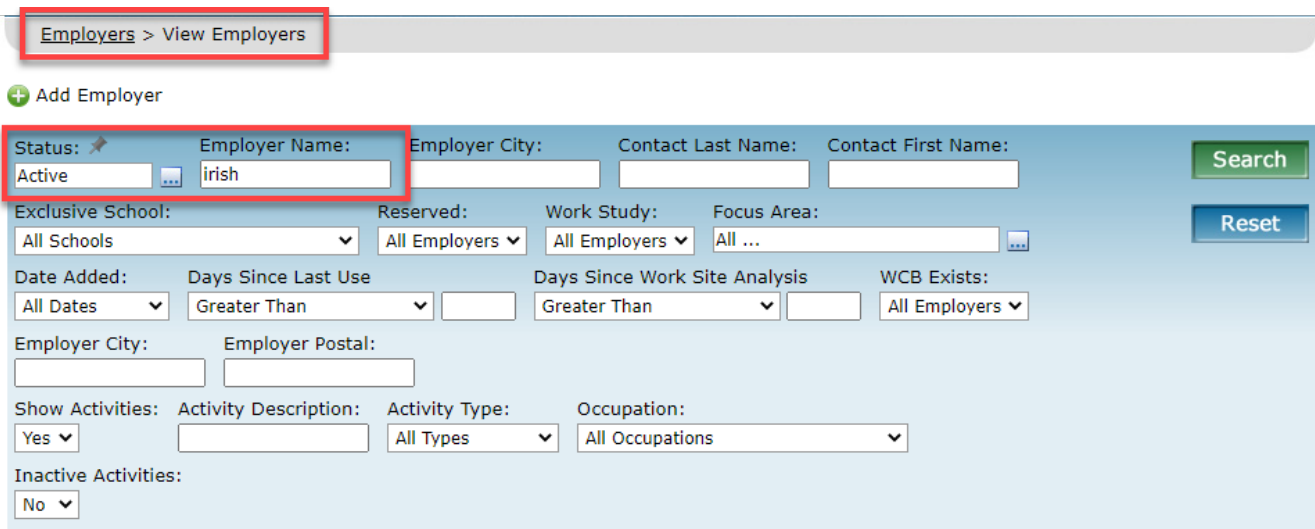
As explained in the *Filter Box* section of this guide, the View Employers filter box contains a combination of:

- free-form entry search fields
- dropdowns and multi-select fields for isolating student records

Remember: “Reset” can be used to clear selections if too many filters have been applied and the expected results are not returned. However, “sticky” fields (such as the “Status” field with the push pin icon), are not reset.

The sample search in the screenshot below will return all active employers with “Irish” in the employer name

Once Search is clicked, a list of employees meeting the criteria is presented. The details beside each record will vary depending on the search criteria selected.



Employers > View Employers

+ Add Employer

Status: Active Employer Name: Irish Employer City: Contact Last Name: Contact First Name: Search

Exclusive School: All Schools Reserved: All Employers Work Study: All Employers Focus Area: All ... Reset

Date Added: All Dates Days Since Last Use: Greater Than Days Since Work Site Analysis: Greater Than WCB Exists: All Employers

Employer City: Employer Postal:

Show Activities: Yes Activity Description: Activity Type: All Types Occupation: All Occupations

Inactive Activities: No

View Columns functionality allows the user to select what information will appear in the list.

Displaying 2 Activities • Additional View Columns: Multiple ...

Employer Details	Activity Details	Select	Employer Name	Days Since Last Use	Days Since Work Site Analysis	Address 1	Address 2	City	Province	Postal Code	Website	Contact Name and Number	Activity Type	Active Activity	Contact Name	Contact Number	WCB	Work Site Analysis Date
		☐	Irish Setter 686 BUBINGA STREET	☒	☐										Matthews, Gerard	250 860-1547 X123		
		☐	Irish WolfHound 803 LIME STREET	☐	☐										Nash, Evelyn	250 860-1548 X123		

Select All - Print Selected

Note that below the list of employers, the user can select some, or all, of the employers in the list and generate letters, perform mass actions, or download details for the selected records. Details on these functions are provided in the *Employer Mass Actions* section of this guide.

Add Employer - The Employer Record

Clicking the  Add Employer button will generate the *New Employer Details* screen.

Employer Details will display at the top regardless of the tab selected.	
Employer Name	Enter the name of the business.
Status	• Prospective: For employers that are being reviewed for work experience placements. • Active: For employers that are ready to accept work experience placements. • Temp Inactive: For employers that are not currently accepting placements but will do so again in the future. • Inactive: For employers no longer being used for work experience placements.
Address Fields	Populate the physical address of the business.
Website Phone & Fax fields	Website: enter the URL for the business website, if applicable. Phone: Business phone number. Fax: Business fax number, if applicable.
Primary Contact Details: Job Title	Populate the student's pupil number from the district student information system.
Primary Contact Details: Name fields	Enter the Last Name and First Name of the primary contact person at this business.
Primary Contact Details: Email, Phone & Cell fields	Enter the email and phone contact information for the primary contact person at this business.
Click Add Employer to create the record. This button becomes Update Employer once the record has been created.	

Employers > View Employers > Employer Details 

New Employer Details

Employer Name: * The Family Business
 Status: Active
 Address 1: 666 Destruction St
 Address 2:
 City: Coquitlam
 Website: http://www.thefamilybusiness.cor
 Province: British Columbia
 Fax:
 Postal Code: V1X 9B4

Primary Contact Details

Job Title: Mob Boss
 Email: mobboss@email.com
 Last Name: * Landry
 Phone: 778-666-7890 Ext:
 First Name: * Joe
 Cell:

Basic Tab

The Basic tab contains additional details relevant to the employer.

Reserved	If this field is set to Yes, an alert will be displayed when assigning the employer as a placement, warning the user that this is only to be assigned by district users. A Yes setting will also cause the employer name to appear in red in the employer search list. Note: The flag will not prevent the assignment – only warn the user that it is restricted.  RESERVED FOR DISTRICT USE ONLY
Exclusive School	If a school is selected in this field, an alert will be displayed when assigning the employer as a placement, warning the user that this is reserved by the school indicated.  FOR EXCLUSIVE USE WITH ZEUS SECONDARY SCHOOL
Work Study	If this field is set to Yes, an alert will be displayed when assigning the employer as a placement, warning the user that this is reserved for work study placements.  RESERVED FOR WORK STUDY STUDENTS
Additional Language	If the employer requires or prefers that an additional language is spoken for a work placement, it may be selected from the dropdown list. Languages can be added to this list in Admin > Manage Languages.
Minimum Grade	A minimum grade may be selected if the employer requires a student to be at least a certain grade before accepting the placement.
WCB	The business WorkSafeBC number.
Work Site Analysis Date	Enter the email and phone contact information for the primary contact person at this business.
One Time Use	Set to Yes if this employer does not accept regular placements.
Notes	Anecdotal notes may be added to employer records as well.
Click Add Employer to create the record. This button becomes Update Employer once the record has been created.	

Basic

Reserved: No DISTRICT USE ONLY

Exclusive School: Zeus Secondary School

Work Study: No RESERVED FOR WORK STUDY PLACEMENTS

Additional Language: Gaelic

Minimum Grade: 10

WCB: 98765432

Work Site Analysis Date: December 1, 2019

One Time Use: No

Notes: Students get lots of hands-on experience with money laundering.

437 available characters

Back

Create Employer

Activities Tab

An employer must have an activity created in order to be assigned as a student placement. More than one activity can be created for an employer, but only one activity can be assigned per placement to a student. If a student participates in more than one activity with an employer, they require more than one placement with that employer.

+ Add Activity	
Activity Description	Brief description of the activity.
Activity Type	Select appropriate activity type. Additional activity types can be added in Admin > Manage Activity Types.
Occupation Code	Select an occupation code relevant to the activity type.
Activity Position	Enter a job title, if appropriate.
Use Primary Contact (from employer details)	Yes: The primary contact from the <i>Employer Details</i> screen are pre-populated. No: Fields are set to blank for ad hoc entry.
Use Employer (from employer address fields)	Yes: The address details from the <i>Employer Details</i> screen are pre-populated. No: Fields are set to blank for ad hoc entry.

When a new activity is added, four additional tabs appear within the activity:

- **Basic:** Provides fields to record additional information about the placement, such as: Dress code, safety equipment, job duties, work hours and notes about the employer.
- **Memos:** Enables the user to record memos about the employer. Memos can be set as Alerts to generate a notification on the Home screen for follow-up.
- **Placements:** Displays all students with a placement to this employer and activity. Use the Add Placement button to select a school and student to assign to this activity. Details will appear as they do in the Student Details > Placement screen.
- **Certificates:** Use Add Certificate to upload relevant certificates for this activity.

[Employers](#) > [View Employers](#) > [Employer Details](#) > Activity Details

Activity Details

Activity Description: ★ Cleaning Currency	
Activity Type: ★ Work Placement	
Occupation Code: ★ Business Education	
Activity Position: Dryer	

Use Primary Contact: Yes	LINK DETAILS FROM EMPLOYER PRIMARY CONTACT
Job Title: Mob Boss	Email: mobboss@email.com
Last Name: ★ Landry	Work Phone: 778-666-7890 Ext:
First Name: ★ Joe	Cell Phone:

Use Employer: Yes	LINK ADDRESS DETAILS FROM EMPLOYER
Address 1: 666 Destruction St	
Address 2:	
City: Coquitlam	Province: British Columbia
Postal Code: V1X 9B4	Active: Yes

Constraints Tab

Constraints on an employer's record can be used to limit the number of placements to the employer.

Max 30 days	Restrict the number of placements in a 30-day period.
Max 365 days	Restrict the number of placements to occur over 365 days.
Do Not Place Until	Use if an employer is not available to receive placements until the specified dates.
Constraint Notes	Enter additional constraint notes, if needed.
Click Update Employer to save changes.	

Basic

Activities

Constraints

Prerequisites

Max 30 days: 0 PLACEMENTS IN

Max 365 days: 0 PLACEMENTS IN

Do Not Place Until:

Constraint Notes:

Additional information on constraints.

462 available characters

Prerequisites Tab

Prerequisites can be checked on the employer record. When a student is placed, the prerequisites on the employer record are compared to those on the student record. Flags will appear to show if the student has the prerequisites required for the employer.

Basic

Activities

Constraint 1

Prerequisites

Required	Description
☒	Confidentiality Training
☐	Criminal Record Check
☐	Current Flu Shot
☐	Food Save Level 1
☒	Safety Training
☐	TB Skin Test
☒	WHMIS

Back

Update Employer

Memos Tab

Memos can be created to track information on an employer. Memos can also be set as an alert to appear on the home screen where follow-up is required.

1. Use the **+ Add Memo** button to generate the *New Memo Details* screen.
2. Enter a brief subject area for the memo.
3. If the memo requires follow-up, set the Alert field to Yes. When the date field appears, select a date by which the memo by which the action should be taken.
4. Notes to provide additional detail may be entered here.
5. Click Create Memo to create the record.

Memo Details for The Family Business

Subject: *

Alert:

Alert Date: * 

Memo:

Documents Tab

The documents tab can be used to keep an electronic record of employer contracts, agreements, or any other information relevant to the employer record. Maximum document size is 5 MB per document.

1. Click the **+ Add Document** button to generate the *New Document Details* screen.
2. Click the box to choose files or drag and drop to upload documents.
- 3.

Basic
Activities
Constraints
Prerequisites
Memos
Documents
Placements

Details
Filename ▾
Size ▾
Date Uploaded ▾
Remove

+ Add Documents

Click to select or drag and drop
files to the documents tab.

Placements Tab

Displays all students with a placement to this employer and activity. Use the Add Placement button to select a school and student to assign to this activity. Details will appear as they do in the Student Details > Placement screen. A placement can also be added from this screen.

Basic
Activities
Constraints
Prerequisites
Memos *
Documents *
Placements

+ Add Placement

Details	Student Common Student Legal ▾	Start Date End Date ▾	Grade Grad Year ▾	School ▾	Hours ▾	Contact Cancelled By ▾	Remove
	Fowl, Artemis FOWL, ARTEMIS	Feb 1, 2020 MAR 31, 2020	10 2021-2022	ZEU	32		

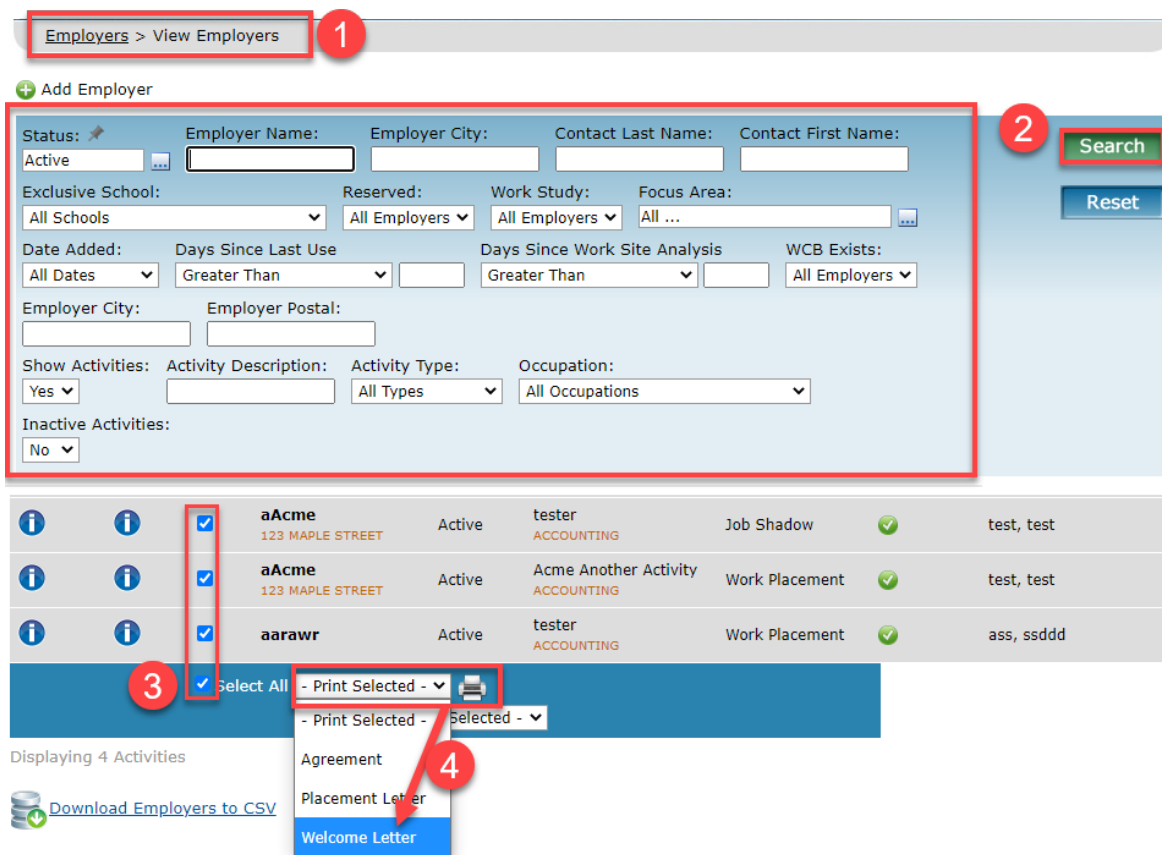
+ Add Placement

11.0 Employer Mass Actions

Print Selected To

When filtering for students in **Employers > View Employers**, the user has the ability to generate custom-designed letters for multiple students at once. These letters are created in *Admin > Manage Letters* with a target of Employer.

1. Go to **Employers > View Employers**.
2. Filter for the employers requiring the same letter.
3. Select individual Employers in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Print Selected to** dropdown menu, select the report or letter to run.



The screenshot shows the 'Employers > View Employers' page. A red box labeled '1' highlights the breadcrumb navigation. Another red box labeled '2' highlights the search and filter section on the right. A large red box labeled '3' encompasses the filter form and the employer list. Within the list, a red box labeled '4' highlights the 'Print Selected to' dropdown menu.

Filter Form:

- Status:
- Employer Name:
- Employer City:
- Contact Last Name:
- Contact First Name:
- Exclusive School:
- Reserved:
- Work Study:
- Focus Area:
- Date Added:
- Days Since Last Use:
- Days Since Work Site Analysis:
- WCB Exists:
- Employer City:
- Employer Postal:
- Show Activities:
- Activity Description:
- Activity Type:
- Occupation:
- Inactive Activities:

Employer List:

Info	Info	Selection	Employer Name	Address	Status	Activity	Placement	Notes
		☒	aAcme	123 MAPLE STREET	Active	tester ACCOUNTING	Job Shadow	test, test
		☒	aAcme	123 MAPLE STREET	Active	Acme Another Activity ACCOUNTING	Work Placement	test, test
		☒	aarawr		Active	tester ACCOUNTING	Work Placement	ass, ssddd

Actions:

- ☒ Select All
- Print Selected -
- Print Selected - Selected -
- Agreement
- Placement Letter
- Welcome Letter

Displaying 4 Activities

Download Employers to CSV

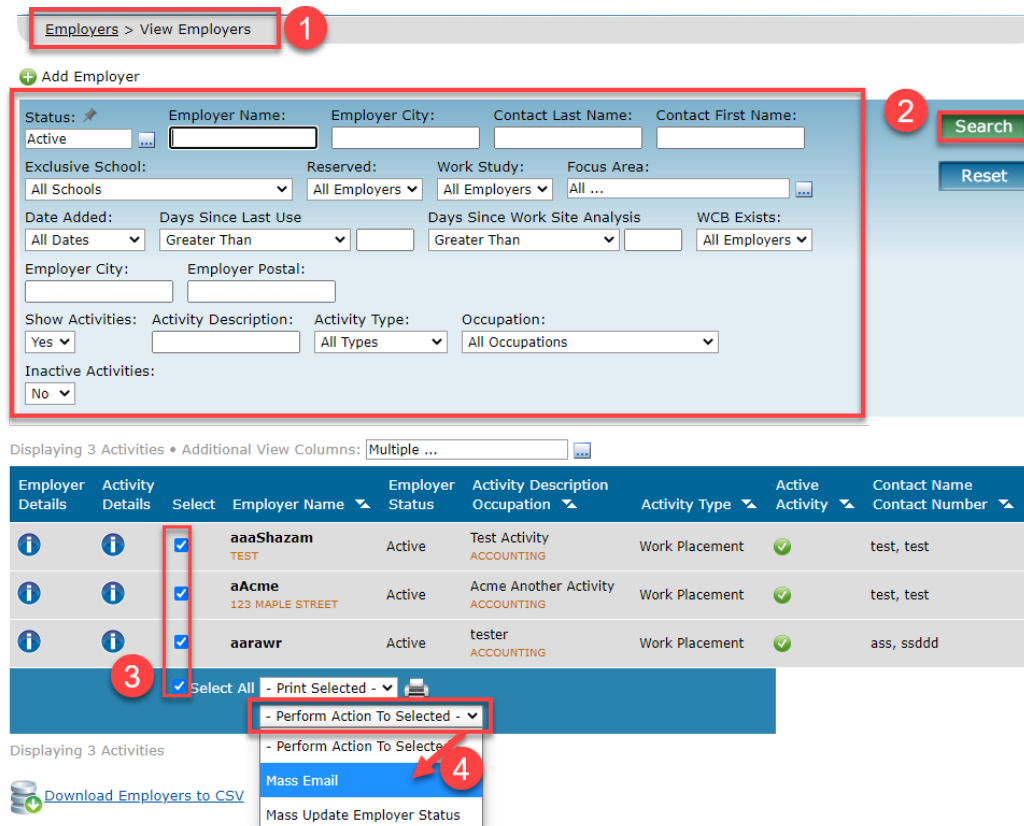
Perform Action to Selected

In **Employers > View Employers**, the user has the ability to mass email employers or mass update employer statuses.

Mass Email

1. Go to **Employers > View Employers**.
2. Filter for the employers requiring the same email.
3. Select individual employers in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Perform Action to Selected** dropdown menu, select **Mass Email**.
5. In the *Email Details* screen:
 - a. The *Details* link in the **To:** field can be used to confirm who the recipients are.
 - b. The **Carbon Copy** field can be used to cc the sender and anyone else who needs the content.
 - c. **Merge Tags** below the text box can be used to personalize the content of the message for the recipients.
 - d. The  icon can be used to attach documents to the email.

Remember that multiple recipients may be receiving this email, so attached documents should not contain personal information.
6. Enter a **Subject** for this email content.
7. Populate the message content in the text field. A variety of rich text tools are available to customize content as needed.
8. Click **Send Email** to deliver the message to recipients.



The screenshot shows the 'Employers > View Employers' page. A red box labeled '1' highlights the breadcrumb navigation. A red box labeled '2' highlights the search and filter section on the right. A red box labeled '3' highlights the 'Select' column in the employer list, where three employers are selected. A red box labeled '4' highlights the 'Perform Action to Selected' dropdown menu, which is open and shows the 'Mass Email' option selected.

Employers > View Employers

+ Add Employer

Status: Active
 Employer Name:
 Employer City:
 Contact Last Name:
 Contact First Name:
 Exclusive School: All Schools
 Reserved: All Employers
 Work Study: All Employers
 Focus Area: All ...
 Date Added: All Dates
 Days Since Last Use: Greater Than
 Days Since Work Site Analysis: Greater Than
 WCB Exists: All Employers
 Employer City:
 Employer Postal:
 Show Activities: Yes
 Activity Description:
 Activity Type: All Types
 Occupation: All Occupations
 Inactive Activities: No

Search
Reset

Displaying 3 Activities • Additional View Columns: Multiple ...

Employer Details	Activity Details	Select	Employer Name	Employer Status	Activity Description Occupation	Activity Type	Active Activity	Contact Name Contact Number
		☒	aaaShazam TEST	Active	Test Activity ACCOUNTING	Work Placement		test, test
		☒	aAcme 123 MAPLE STREET	Active	Acme Another Activity ACCOUNTING	Work Placement		test, test
		☒	aarawr	Active	tester ACCOUNTING	Work Placement		ass, ssddd

Select All - Print Selected -

- Perform Action To Selected -

- Perform Action To Selected -

Mass Email

Mass Update Employer Status

Displaying 3 Activities

Download Employers to CSV

Employers > View Employers > Email Details 5

New Email Details

To: 3 Recipients [\[DETAILS\]](#) a Use details link to view recipient details.

Subject: * Job Fair 6

From Name: * Sys Admin

From Email: * info@mywex.ca

b Carbon Copy: WILL RECEIVE A SUMMARY EMAIL

B *I* U [List Icons] Verdana 11pt [Text Icons]

Dear [employerprimarycontact],

This message is to invite [employername] to participate in our job fair happening May 31, 2021. This will introduce you to students seeking summer employment and allow our students to explore opportunities.

Sincerely,

Career Coordinator.

c Use employer merge tags to personalize the content.

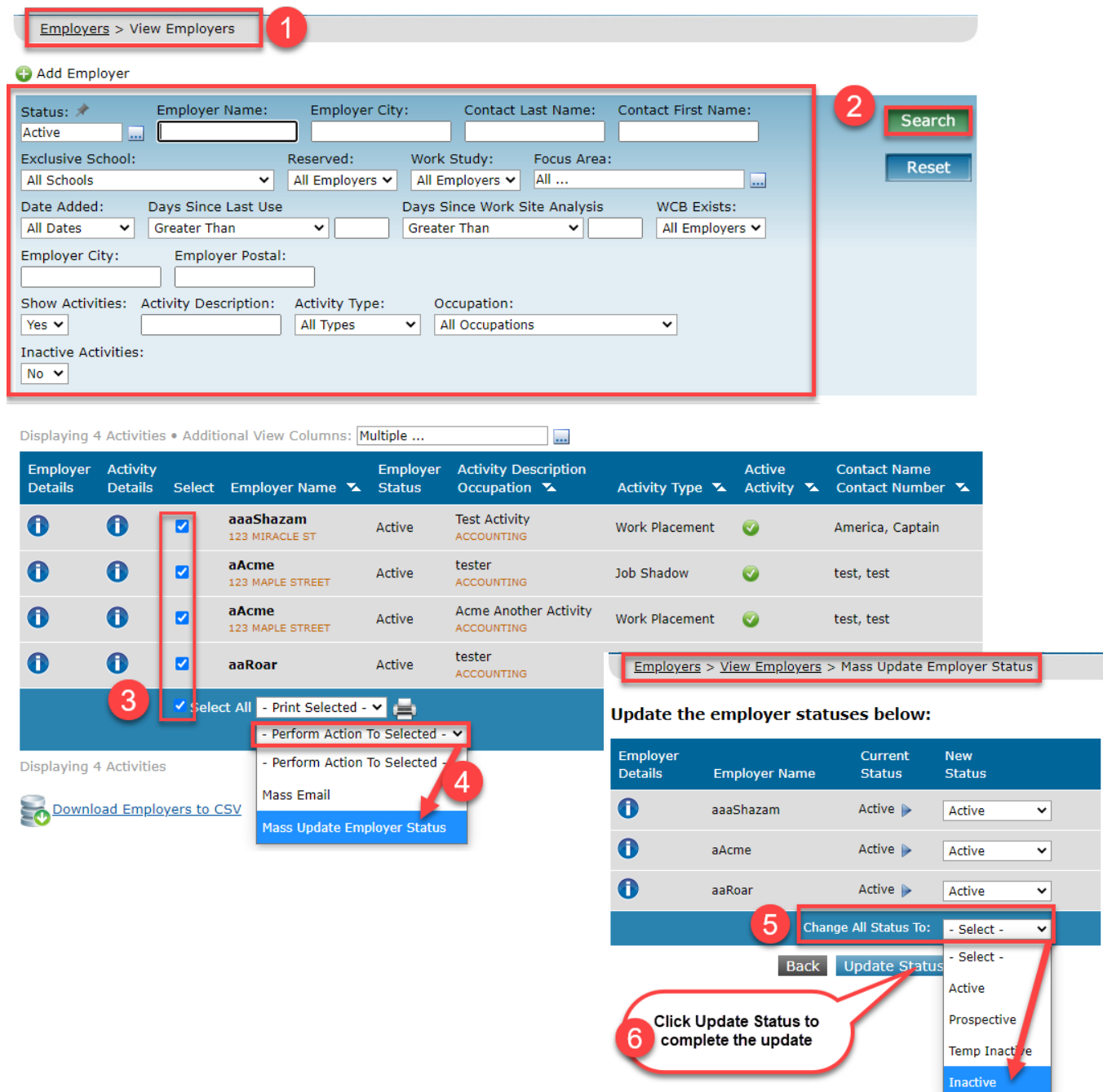
MERGE TAGS: Employer - Select Tag -

d Use to attach relevant documents to the message.

8 Back Send Email

Mass Update Employer Status

1. Go to **Employers > View Employers**.
2. Filter for the employers requiring the same status update.
3. Select individual employers in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Perform Action to Selected** dropdown menu, select **Mass Update Employer Status**.
5. Use the **Change All Status To:** dropdown to select the status to be applied to all employer records. Note that individual employers in the list can be set to something different if one has been included in error.
6. Click **Update Status** to complete the update for the records in the list.



Employers > View Employers

+ Add Employer

Status: Employer Name: Employer City: Contact Last Name: Contact First Name:

Exclusive School: Reserved: Work Study: Focus Area:

Date Added: Days Since Last Use: Days Since Work Site Analysis: WCB Exists:

Employer City: Employer Postal:

Show Activities: Activity Description: Activity Type: Occupation:

Inactive Activities:

Search **Reset**

Displaying 4 Activities • Additional View Columns:

Employer Details	Activity Details	Select	Employer Name	Employer Status	Activity Description	Occupation	Activity Type	Active Activity	Contact Name	Contact Number
		☒	aaaShazam 123 MIRACLE ST	Active	Test Activity ACCOUNTING		Work Placement		America, Captain	
		☒	aAcme 123 MAPLE STREET	Active	tester ACCOUNTING		Job Shadow		test, test	
		☒	aAcme 123 MAPLE STREET	Active	Acme Another Activity ACCOUNTING		Work Placement		test, test	
		☒	aaRoar	Active	tester ACCOUNTING					
		☒ Select All								

Displaying 4 Activities

[Download Employers to CSV](#)

Employers > View Employers > Mass Update Employer Status

Update the employer statuses below:

Employer Details	Employer Name	Current Status	New Status
	aaaShazam	Active ▶	Active
	aAcme	Active ▶	Active
	aaRoar	Active ▶	Active

Change All Status To:

Back **Update Status**

Click Update Status to complete the update

Update Status

Active

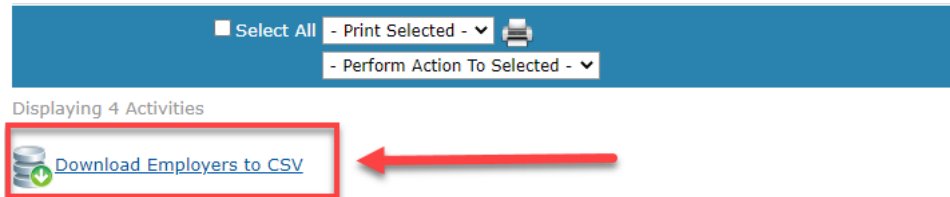
Prospective

Temp Inactive

Inactive

Download Employers to CSV

The **CSV Download** allows the user to extract student details and placement information to a csv (comma separated values) file. Filter for the records to be included in the download and click the CSV Download link.



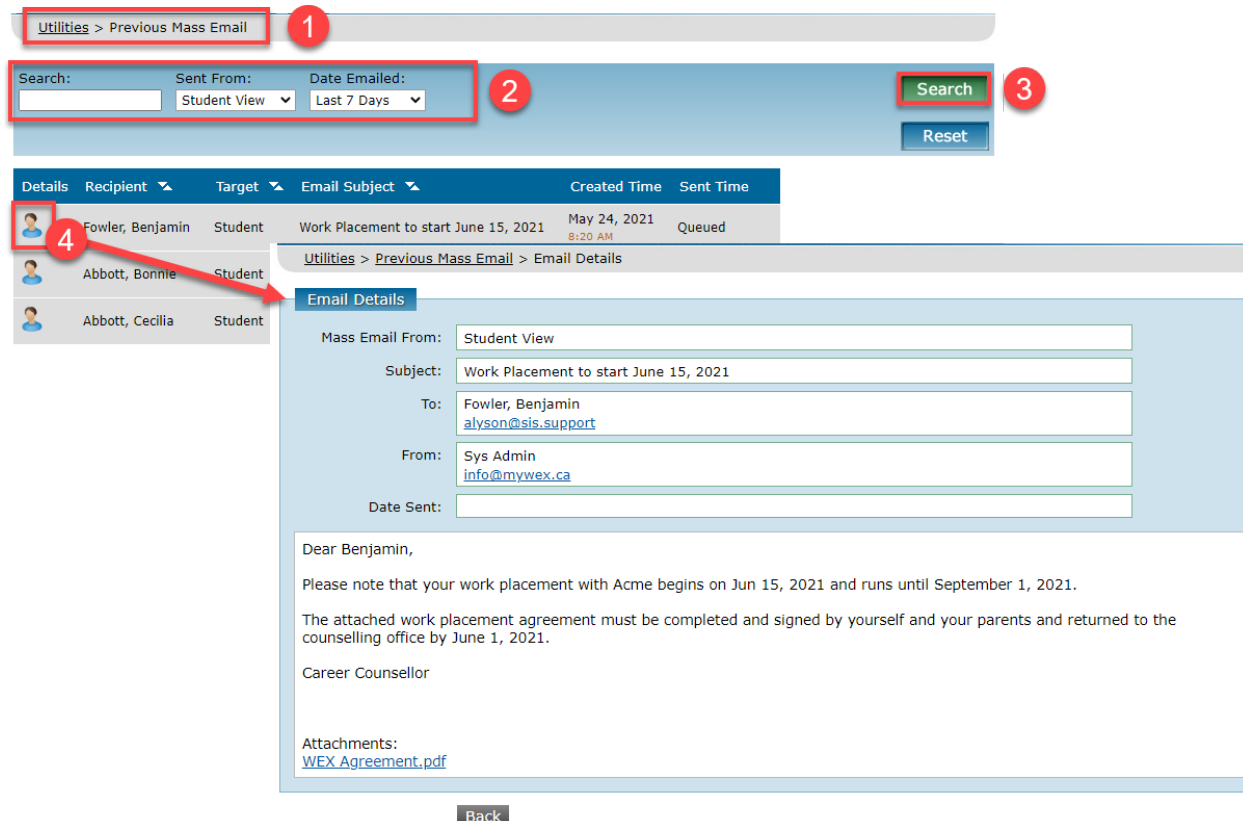
12.0 The Utilities Menu

Previous Mass Email

This utility allows the user to view emails sent using the Mass Email function in *Students > View Students* or *Employers > View Employers*.

- **Search** field: use to key-word search email content.
- **Sent From:** use to refine the search to emails sent from the Students menu or from the Employers menu.
- **Date Emailed:** use to refine the search to a date range.

Once the list of emails is retrieved, the **Details** icon can be used to display the email content.



Track Student Placements

This utility generates a list of students in placements based on the criteria in the filter box at the top.

These records may also be extracted to a spreadsheet using the CSV Download function.

Utilities > Track Student Placements

Placement Status: Activity Type: School:

Include:

Details	Student Common	Student Legal	School	Employer Contact	Description Activity Type	Placement Status	Placement Start
	Abbott, Alyssa ABBOTT, ALYSSA		Apollo Secondary School	Adelie Penguin Fire Rescue ENRIQUE HERRERA	Plasma Denturist WORK PLACEMENT	Active	December 3, 2019

Displaying 1 Placement Record

[CSV Download](#)

Employer Workflow

Level 2 users with the additional security setting of L2 Submit Employer in Admin > System Settings can create employers and submit them for district approval. The Employer Workflow displays these submissions. By clicking into the detail of a submission, the district user can review and approve the employer.

Utilities > Employer Workflow

Workflow Status: Last Updated: Employer Name:

Details	Employer Name	Review Status	Review Status Last Updated	Employer Status	Created By
	Acme Skydiving	Approved (visible by all, placements permitted)	Nov 25, 2019 03:09 PM	Prospective	Captain America
3	Wreck It Ralph	Submitted (under review)	Dec 9, 2019 08:45 PM	Prospective	Tracey Williams

SUBMITTED EMPLOYER RECORD

This employer record submitted by Tracey Williams may now be approved. Once approved, this employer record will be visible to all users.

Update Review Status to:

Employer Details for Wreck It Ralph

Employer Name:

Status:

Address 1:

13.0 The Reports Menu

Activities

The Activities menu produces a report based on the information set in the various filters.

- The filters allow records to be selected prior to running the report.
- Dropdown options determine which columns of information will display on the report. ‘

Click the **Print Report** button to generate a printable report.

[Reports](#) > Activities

Report Options

Report Title: ★ Activity Report

Employer Status: ★ Multiple ...

Focus Area: ★ All ...

Activity Type: ★ Work Placement

Activity Description: Yes ▼ INCLUDE ACTIVITY DESCRIPTION COLUMN IN REPORT

Activity Position: Yes ▼ INCLUDE ACTIVITY POSITION COLUMN IN REPORT

Job Duties: Yes ▼ INCLUDE JOB DUTIES COLUMN IN REPORT

Employer Name: Yes ▼ INCLUDE EMPLOYER NAME COLUMN IN REPORT

Occupation: No ▼ INCLUDE OCCUPATION COLUMN IN REPORT

Focus Area: No ▼ INCLUDE FOCUS AREA COLUMN IN REPORT

Back

Print Report

 [Download Activities to CSV](#)

14.0 Appendix A: Security Matrix

Legend: *asterisk beside a value indicates access is conditional on Admin > System Settings > L2 add

N: No Access **V:** View access **C:** Create access **M:** Modify access **D:** Delete access

Note: Level 1 and Level 2 Users are school users. Access can be restricted based on schools assigned.

Menu	Level 1	Level 2	Level 3	Level 4
Home > MyWEX Quick Stats	V	V	V	V
Home > Date Sensitive Info	V	V	V	V
Home > School Level User Notice • Applies to Level 1 and 2 users, if populated in Admin > System Settings > Message for School Level Users	V	V	N	N
Home > Memos (on students or employers)	N	N	V	V
Students > View Students	V	V	V	V/C/M/D
Students > Add Student	N	C*/M*/D*	N	V/C/M/D
Students > View Students > Print Selected	N	C	N	V/C/M/D
Students > View Students > Perform Action To Selected	N	C	N	V/C/M/D
Students > View Students > CSV Download	C	C	C	V/C/M/D
Student Details > Basic	V	C*/M*/D*	V	V/C/M/D
Student Details > Contacts	V	C*/M*/D*	V	V/C/M/D
Student Details > Prerequisites	V	C*/M*/D*	V	V/C/M/D
Student Details > Placements	V	C*/M*/D*	V	V/C/M/D
Student Details > Memos	V	C*/M*/D*	V	V/C/M/D
Student Details > Documents	V	C*/M*/D*	V	V/C/M/D
Employers > View Employers	V	V	V	V/C/M/D
Employers > Add Employers	N	V/C*/M*	V	V/C/M/D
Employers > Print Selected	N	N	N	V/C/M/D
Employers > Perform Action to Selected	N	N	N	V/C/M/D
Employers > Download Employers to CSV	C	C	C	V/C/M/D
Employers > Employer Details > Basic	V	V/C*/M*/D*	V/M	V/C/M/D
Employers > Employer Details > Activities	V	V/C*/M*/D*	V/M	V/C/M/D
Employers > Employer Details > Activity Details > Basic	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Activity Details > Memos	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Activity Details > Placements	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Activity Details > Certificates	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Constraints	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Prerequisites	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Memos	V	V/C*/M*/D*	V	V/C/M/D
Employers > Employer Details > Documents	V	V/C*/M*/D*	V/C/D	V/C/M/D
Employers > Employer Details > Placements	V	V/C*/M*/D*	V	V/C/M/D

Menu	Level 1	Level 2	Level 3	Level 4
Utilities > Previous Mass Email	V	V	N	V/C/M/D
Utilities > Track Student Placements	V	V/C/M/D	V	V/C/M/D
Utilities > Track Student Placements > CSV Download	C	C	C	V/C/M/D
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Reports > Activities	N	N	C	V/C/M/D
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Admin > Manage Placement Types	N	N	V	V/C/M/D
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