myWEX

WORK EXPERIENCE SIMPLIFIED

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.

Contents

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).

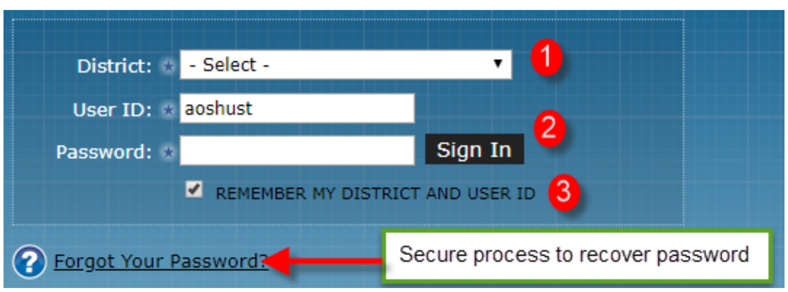
2.0 System Requirements

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).



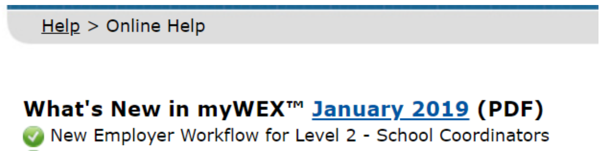
<u>Notes:</u>

- 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

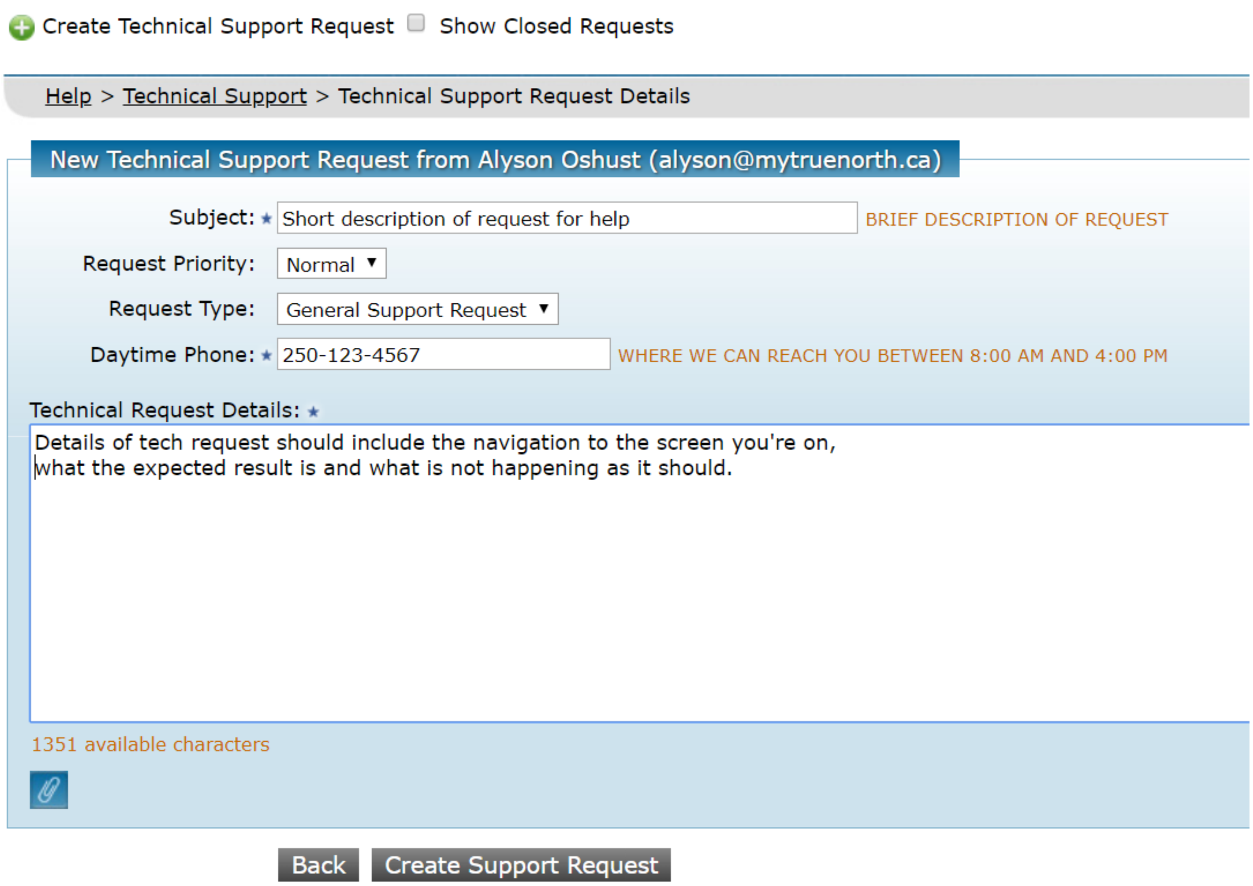
The online help menu item is where this reference guide is found! As well, the Online Help menu contains ***important information about updates and enhancements*** to myWEX in the ***What's New in myWEX*** bulletins.



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.



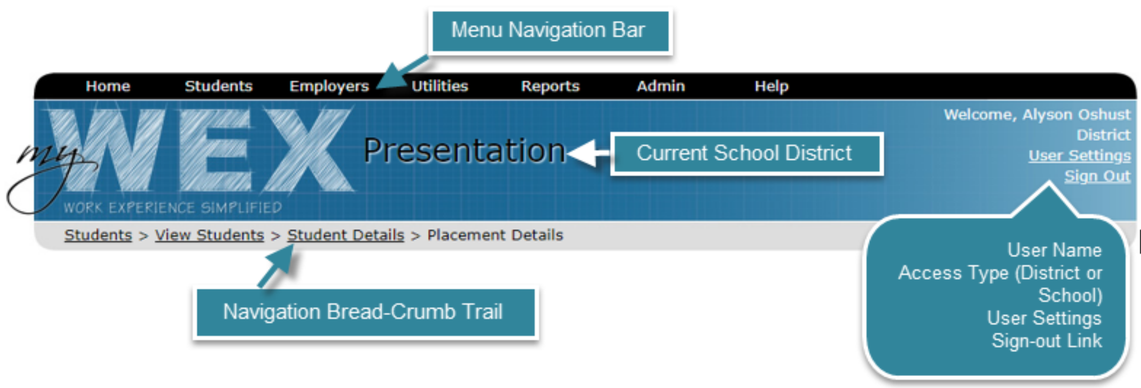
About myWEX

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

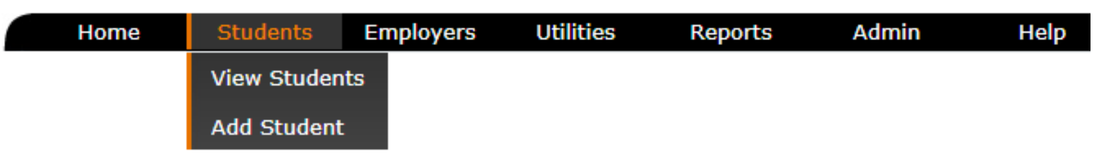
5.0 User Interface Overview

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

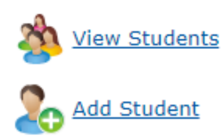
Banner Elements



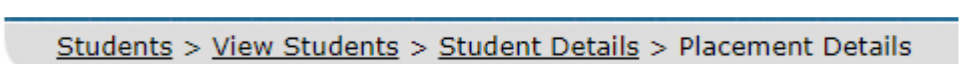
Navigation Menu



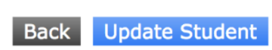
For convenience, each menu can also be displayed with standard icons and web links. For example, clicking on the "Students" menu item will display the following:



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.



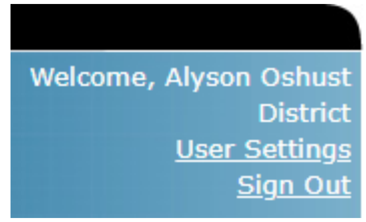
A final way to navigate within myWEX is via the buttons at the bottom of each page:



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.

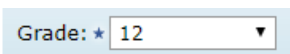
The **Sign Out link** is the recommended way to end a myWEX session. This should be done before closing the web browser window.



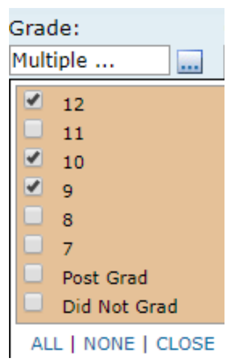
Multi-Select Tools

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)

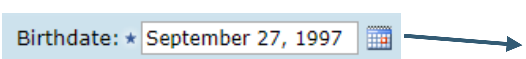


Multi-Select Dropdown Element
(allows selection of multiple items)



Calendar Control

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



See tips below for quick calendar date entry.

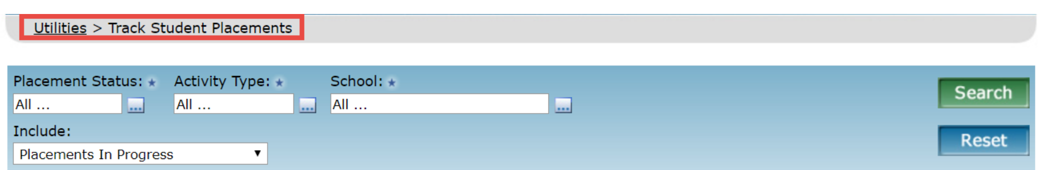
Dates can be entered much more quickly via direct keyboard entry. Examples are listed below.

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 form today (assuming today was September 1). Use any negative integer.
t	"today's date"	Assigns current date.

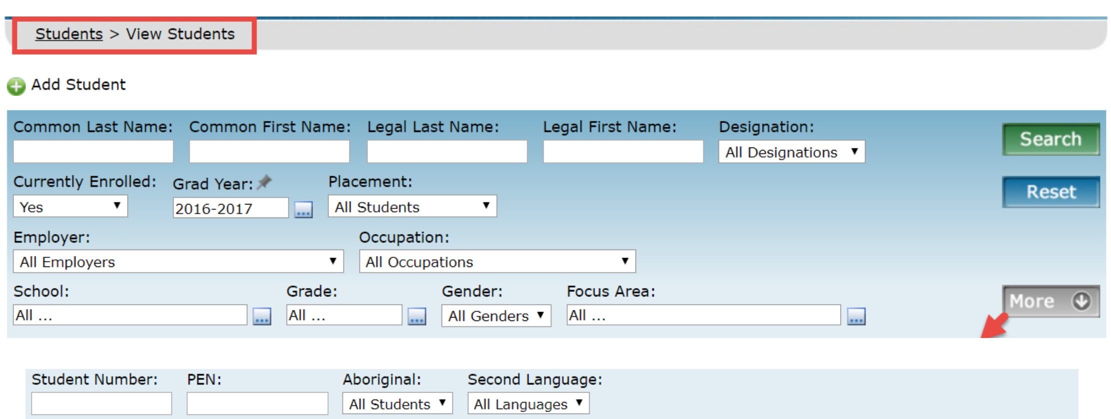
Filter Box

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.



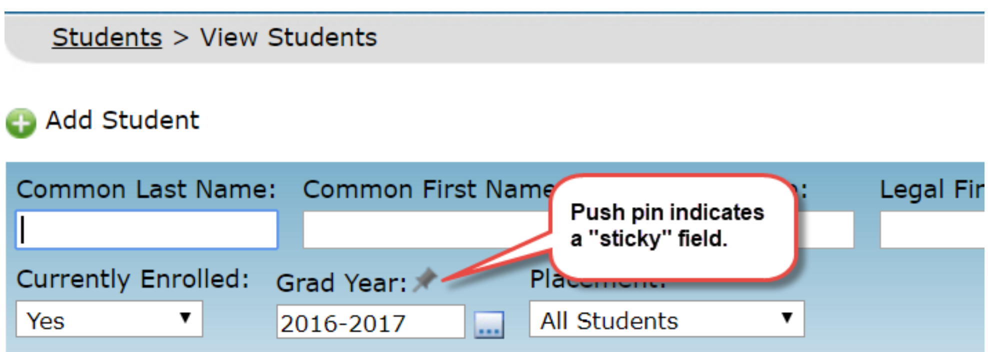
- Filter boxes can also be more sophisticated. In some filter areas, a "More" button is presented which will open additional fields for filtering.



- **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.

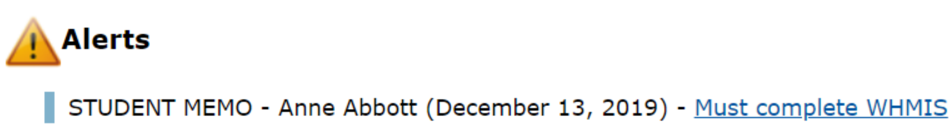
- **Sticky Selections:** myWEX contains a some elements within the blue filter boxes that are considered "sticky". Choices made in these multi-select fields are remembered during subsequent logins from the same computer as search criteria. Furthermore, these sticky selections will be carried through 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.



6.0 The Home Menu

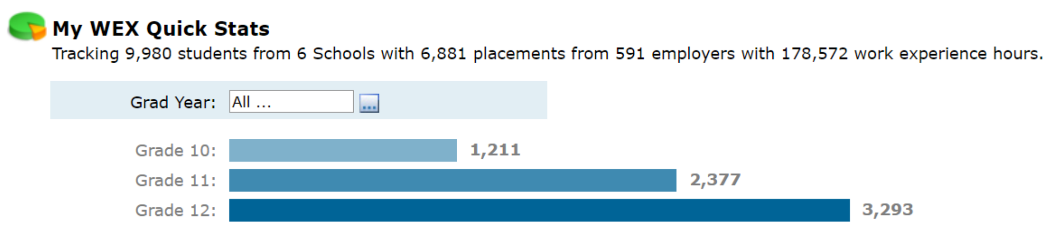
Alerts

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.



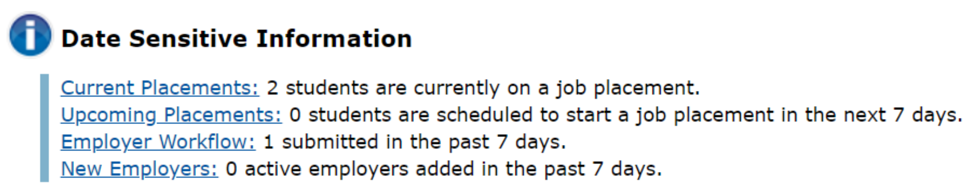
MyWEX Quick Stats

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.



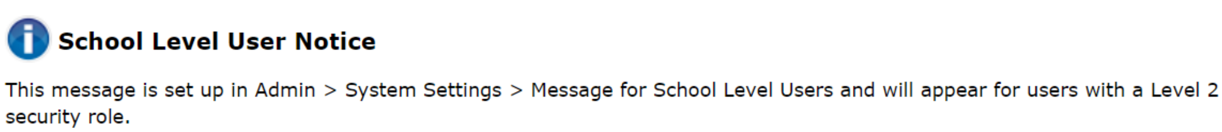
Date Sensitive Information

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



School Level User Notice

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



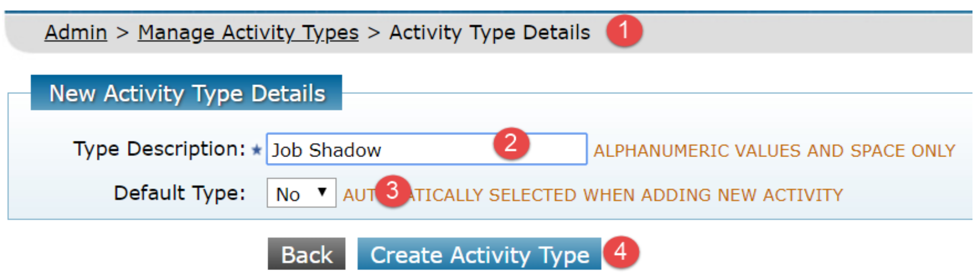
7.0 Setting Up myWEX

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.

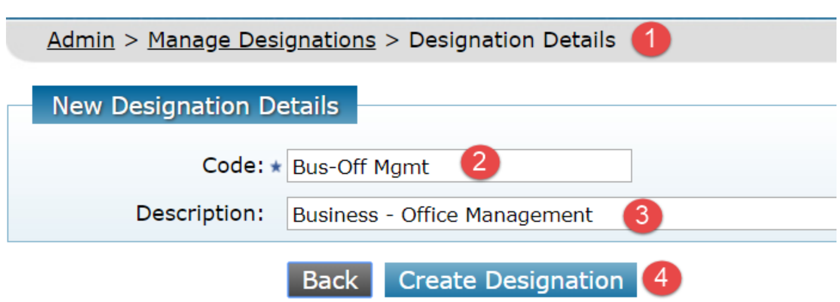


Admin > Manage Designations

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.



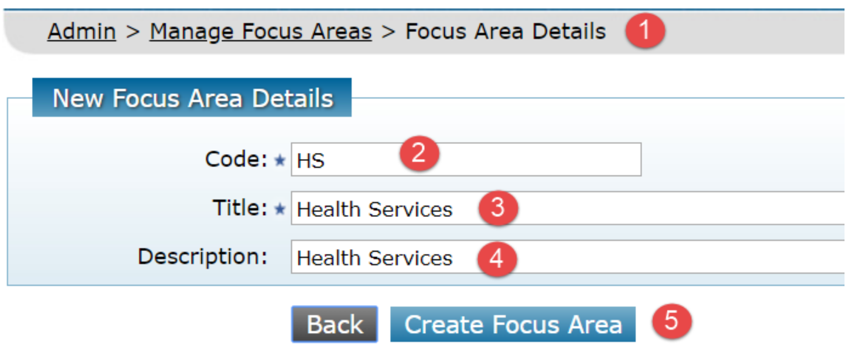
Admin > Manage Focus Areas

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.

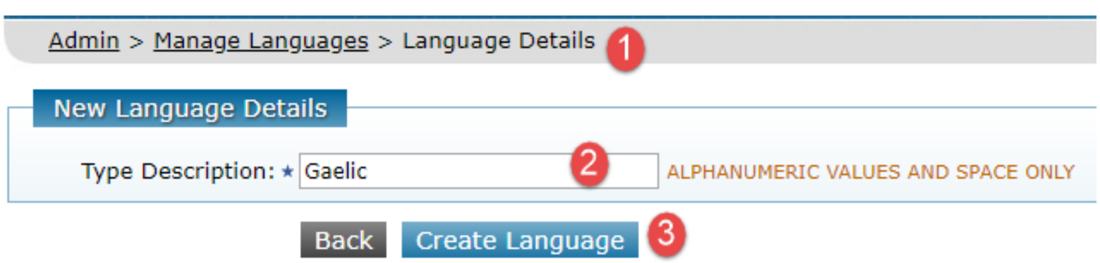


Admin > Manage Languages

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.

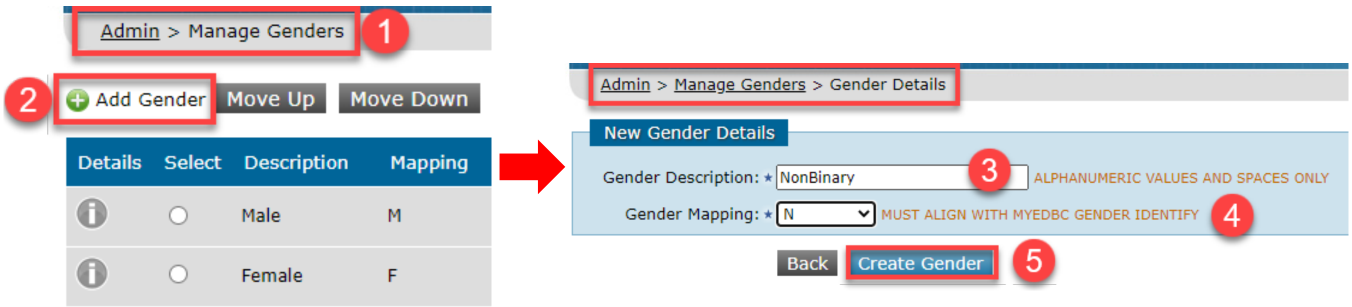
Add Language	
Language Description	Name of the language being added

Screen fields to consider are in the numbered order below.

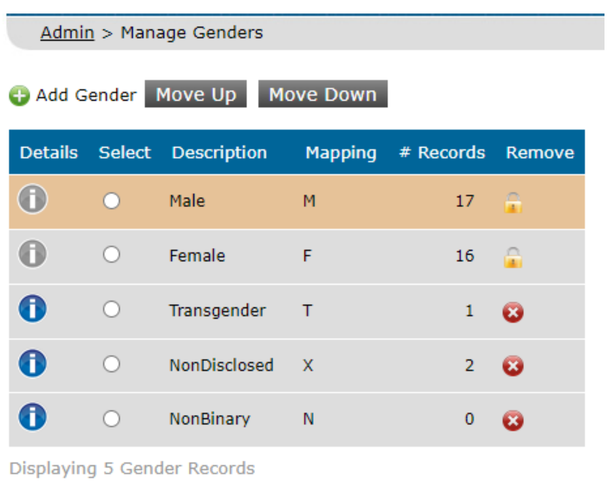


Admin > Manage Genders

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.



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



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.

Admin > Manage Letters

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

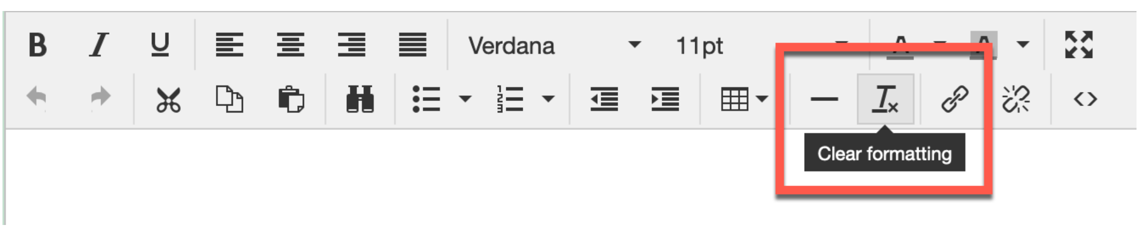
Manage Letters allows international programs to create an unlimited library of form letters and labels that can be targeted to student, placement or employer. Manage Letters functionality provides the ability to:

- 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

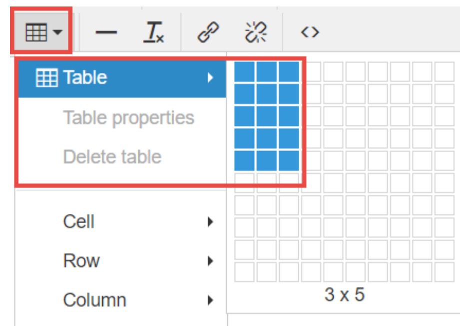
Merge Tag Categories

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.

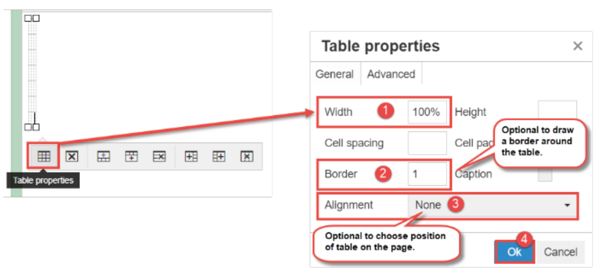
Using Tables in Letters

When creating tables in myWEX, always use % to size table cells and rows. *Do not drag the outside borders of the table to re-size*.

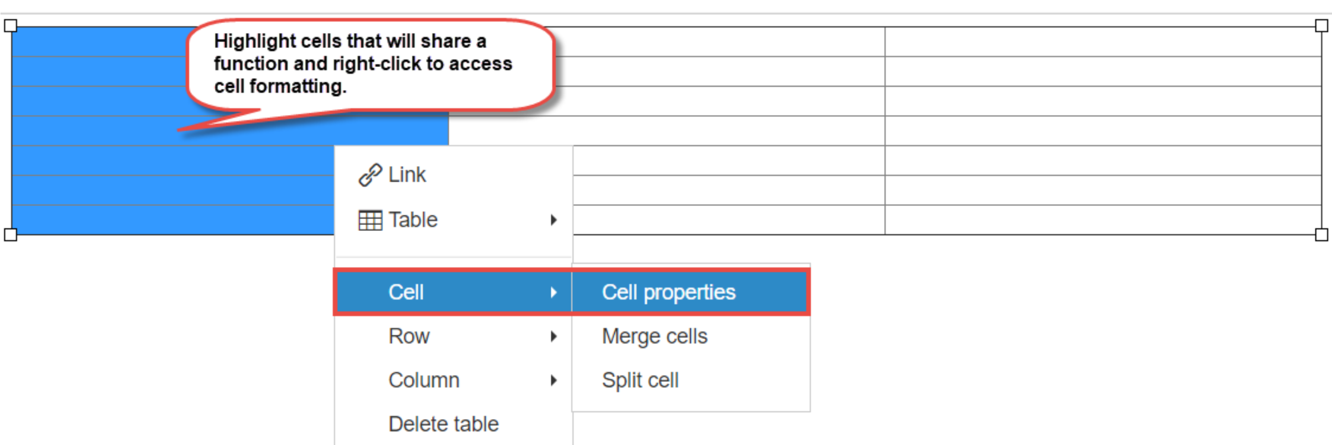
When choosing the table function, select the number of rows and columns needed, then click on the table that is created.



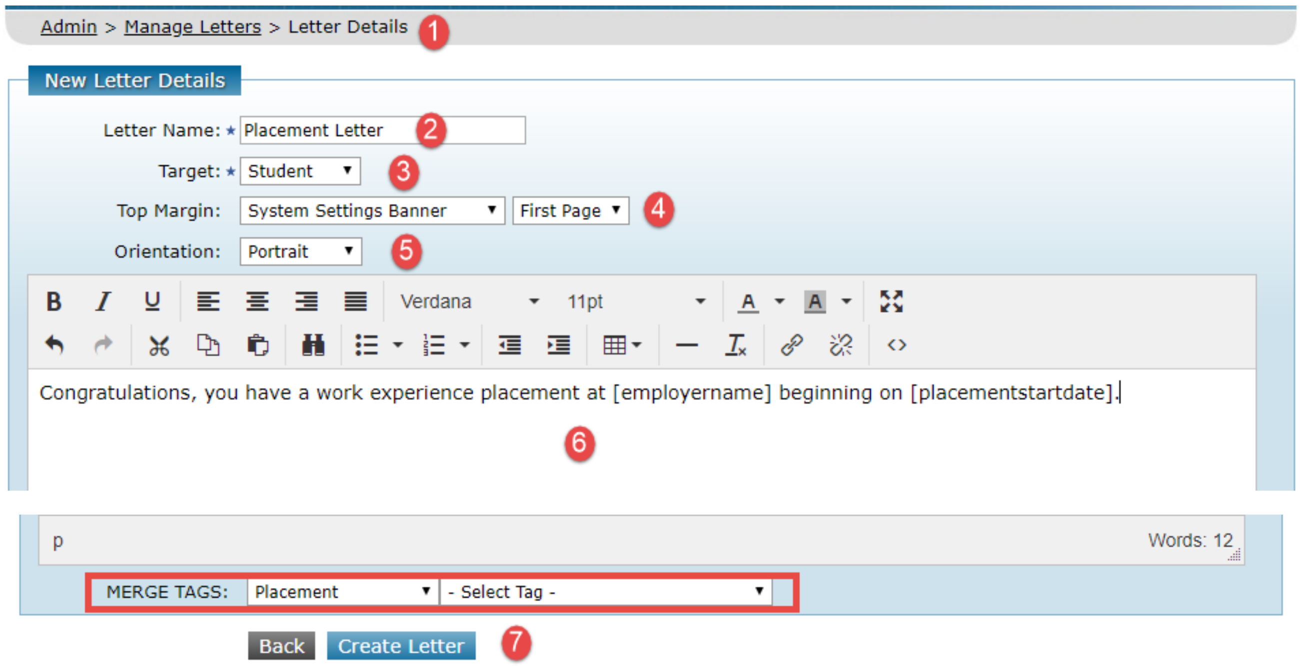
Click the **Table Properties** icon and in the pop-up window, set the Width to 100%. This will expand and snap the table to the margins of the page.



1. Cells and rows may be formatted by highlighting the cell or row that needs to be adjusted and using right-click to open options to format cells or rows.



2. Add rows or columns by using right-click > Row (or Column) and select Add Rows (Columns).



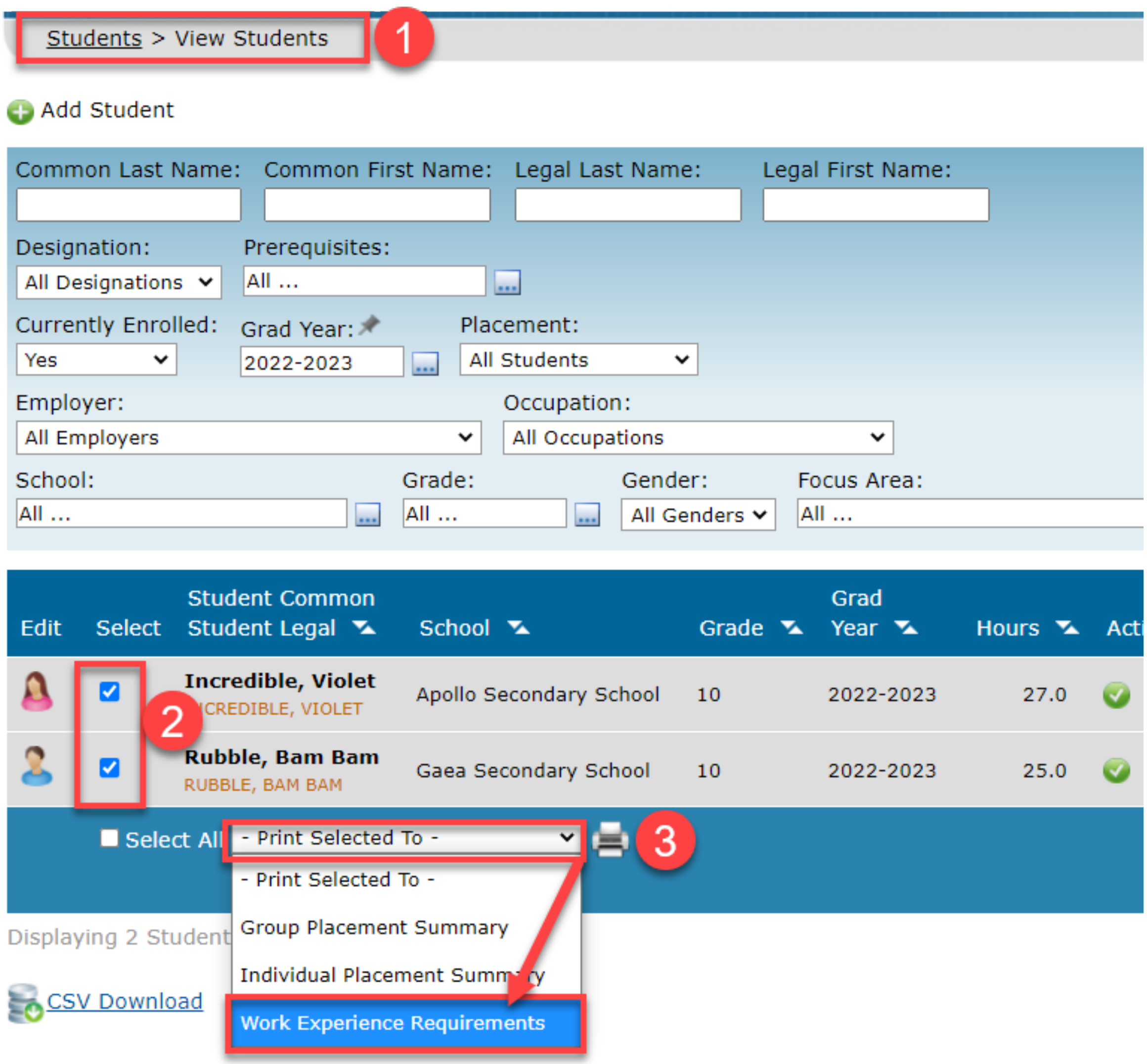
Add Letter	
Letter Name	Short descriptive name for this letter
Target	Select the target audience for this letter: • Employer: runs from Employers > View Employers • Placement: runs from Placement details • Student: runs from Students > View Students
Top Margin	• **System Settings Banner**: Use the program 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.



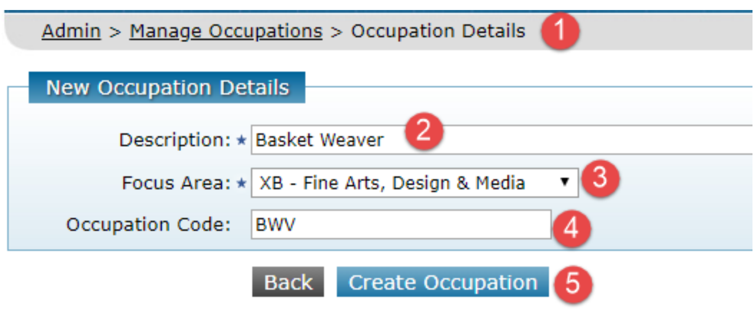
Admin > Manage Occupations

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.

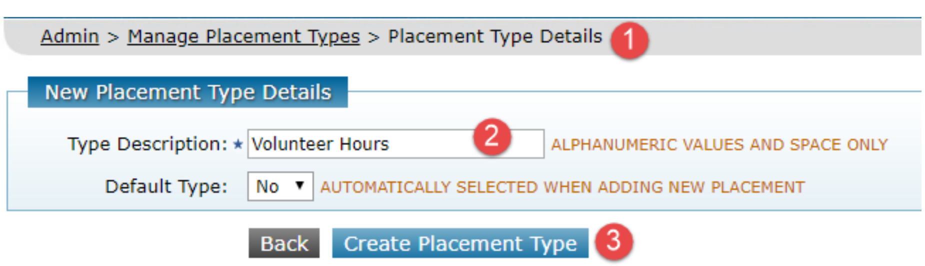


Admin > Manage Placement Types

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.



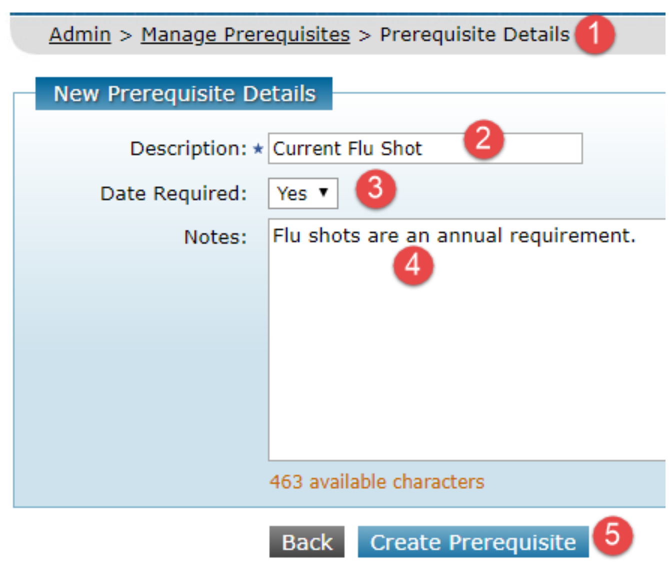
Admin > Manage Prerequisites

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 data 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 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.

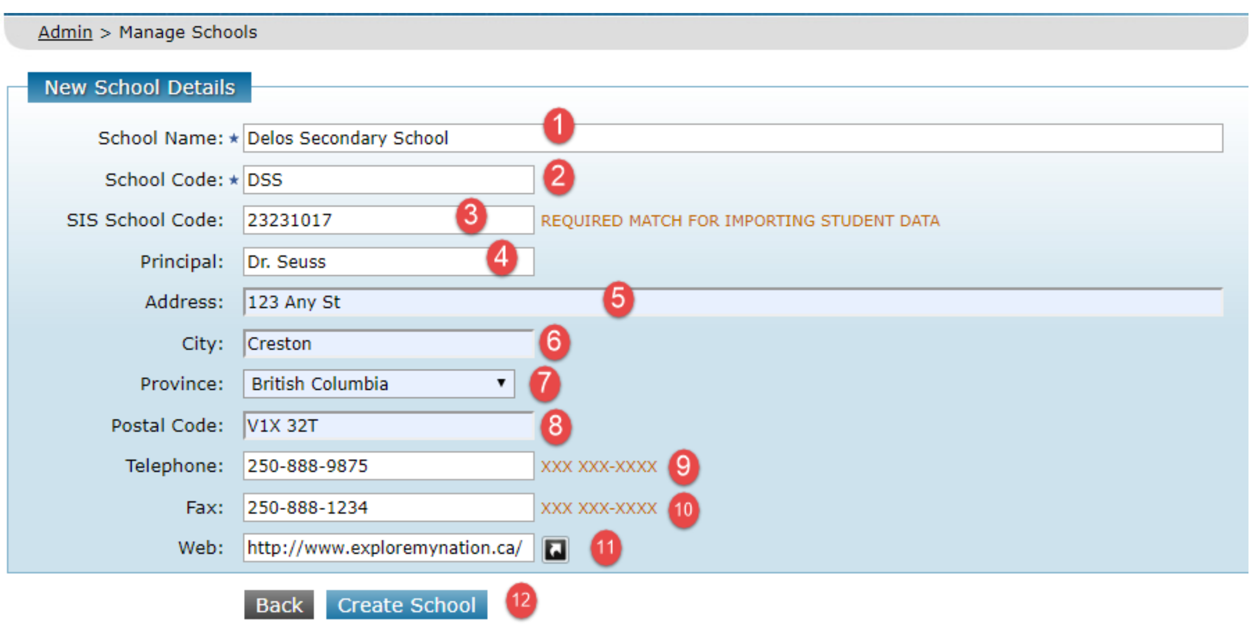
Check **Show Inactive** before adding a school to ensure there is not a pre-existing record that can be set to Active.

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.



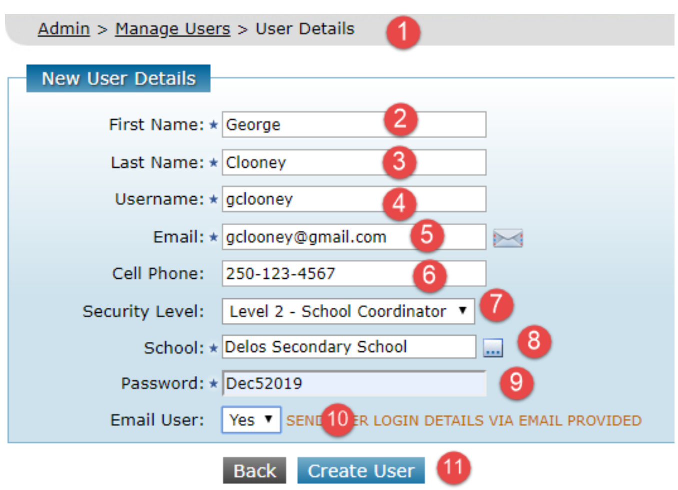
Admin > Manage Users

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.



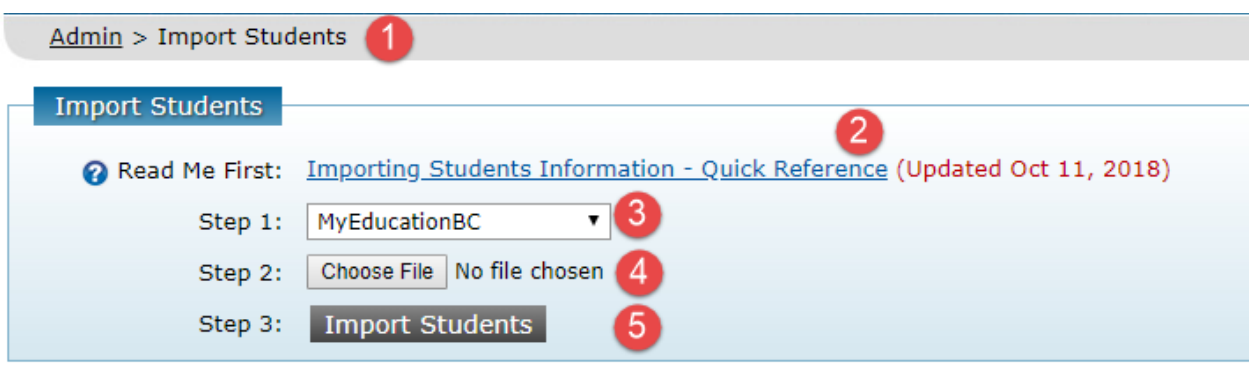
Import Students

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 *Importing Students Information – Quick Reference* 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.

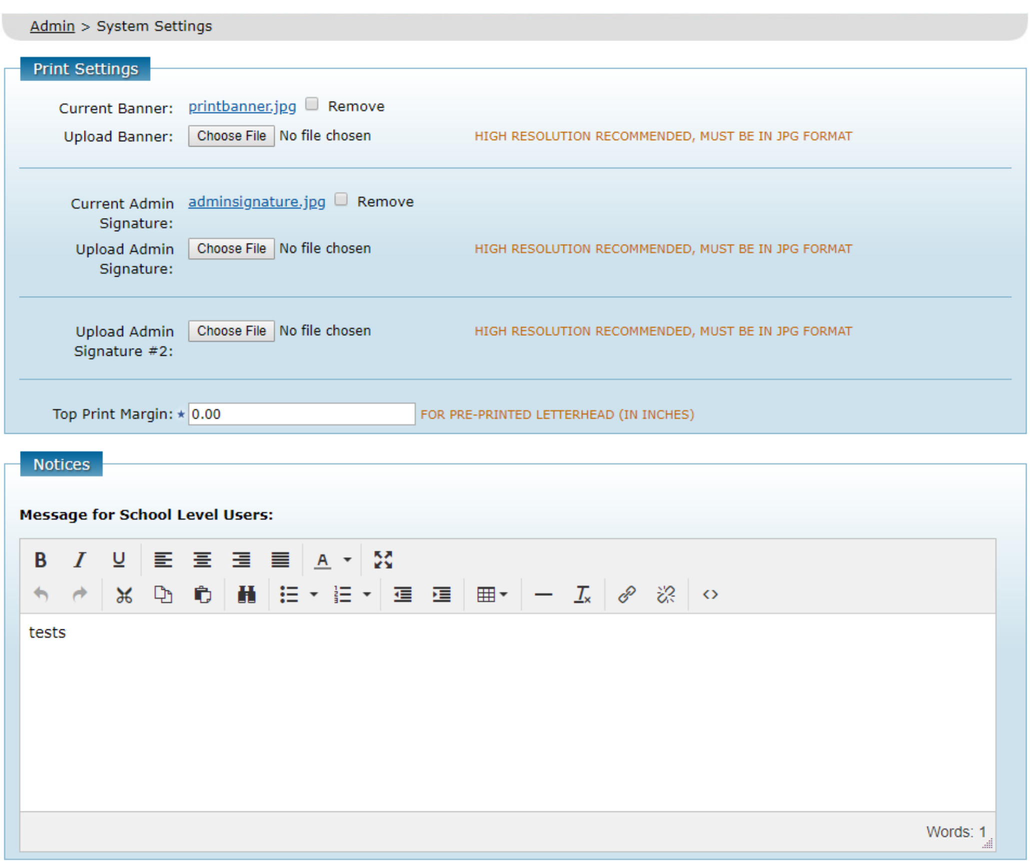
Screen fields to use are in the numbered order below.

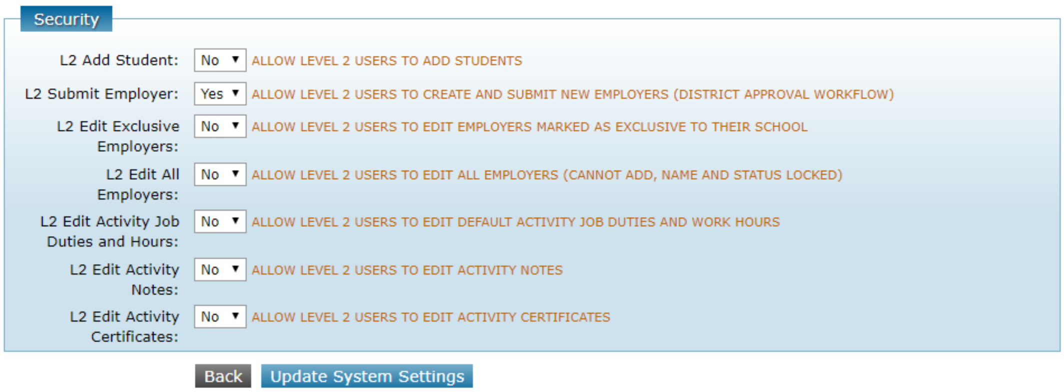


System Settings

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	





8.0 The Student Menu

View Students

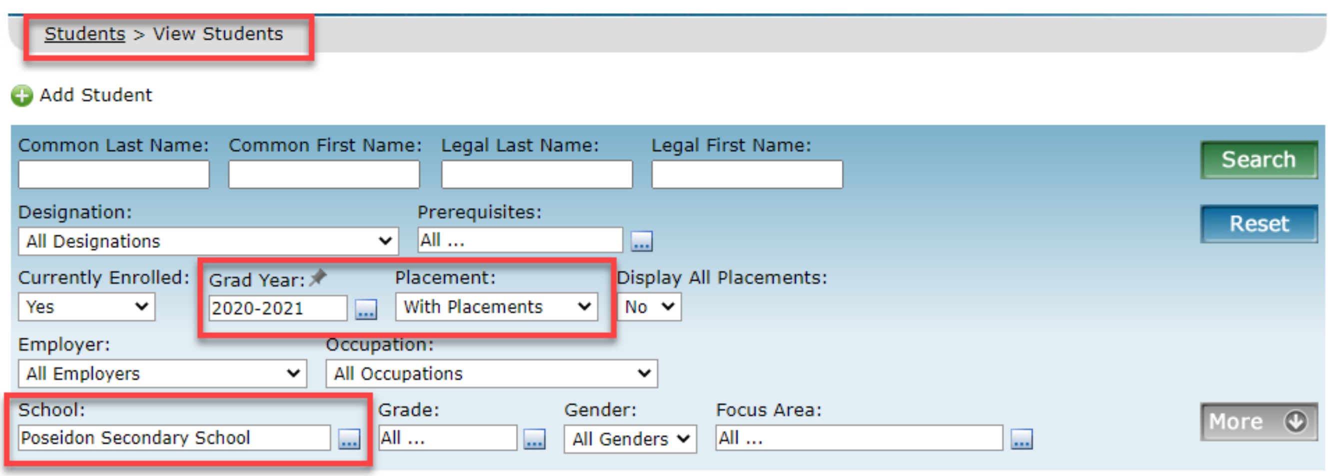
The *View Students* screen provides a filter box so the user can search for one or more students based on selected criteria.

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 More 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.



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.

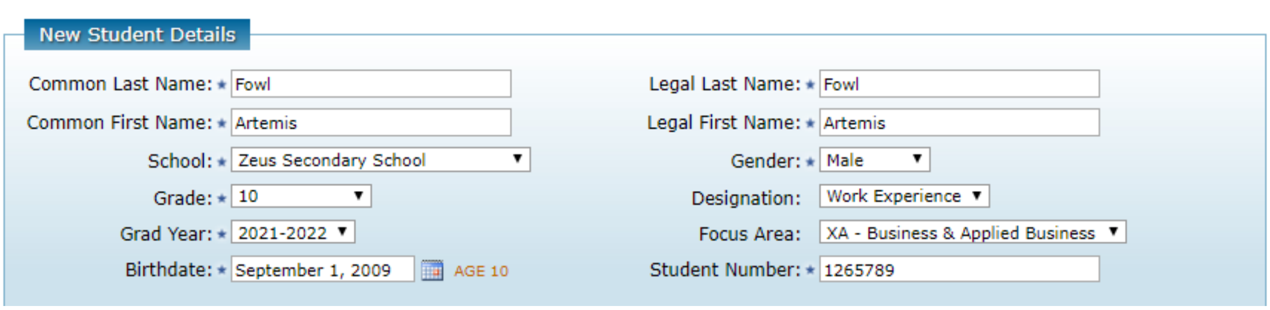
If a student needs to be added manually, use the Add Student button or the Student > Add Student menu option to generate a *New Student Details* screen.

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.

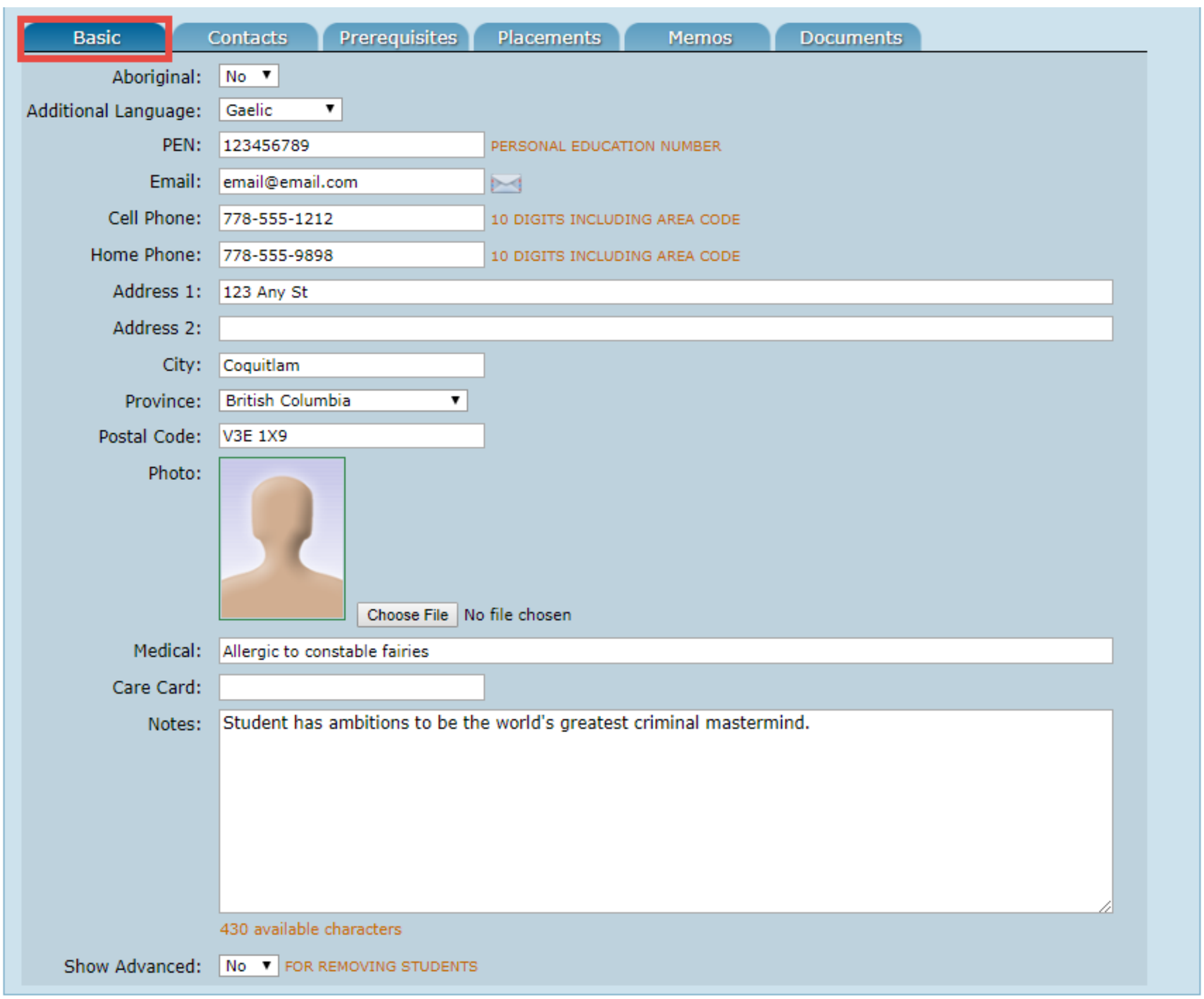
Student Details will display at the top regardless of the tab selected.	
Name fields	When Common Last and Common First Name values are entered, the Legal Last and Legal First Names will auto-populate for convenience. The fields can be changed, if different.
School, Grade, Grad Year	Select the student's 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.	



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.***



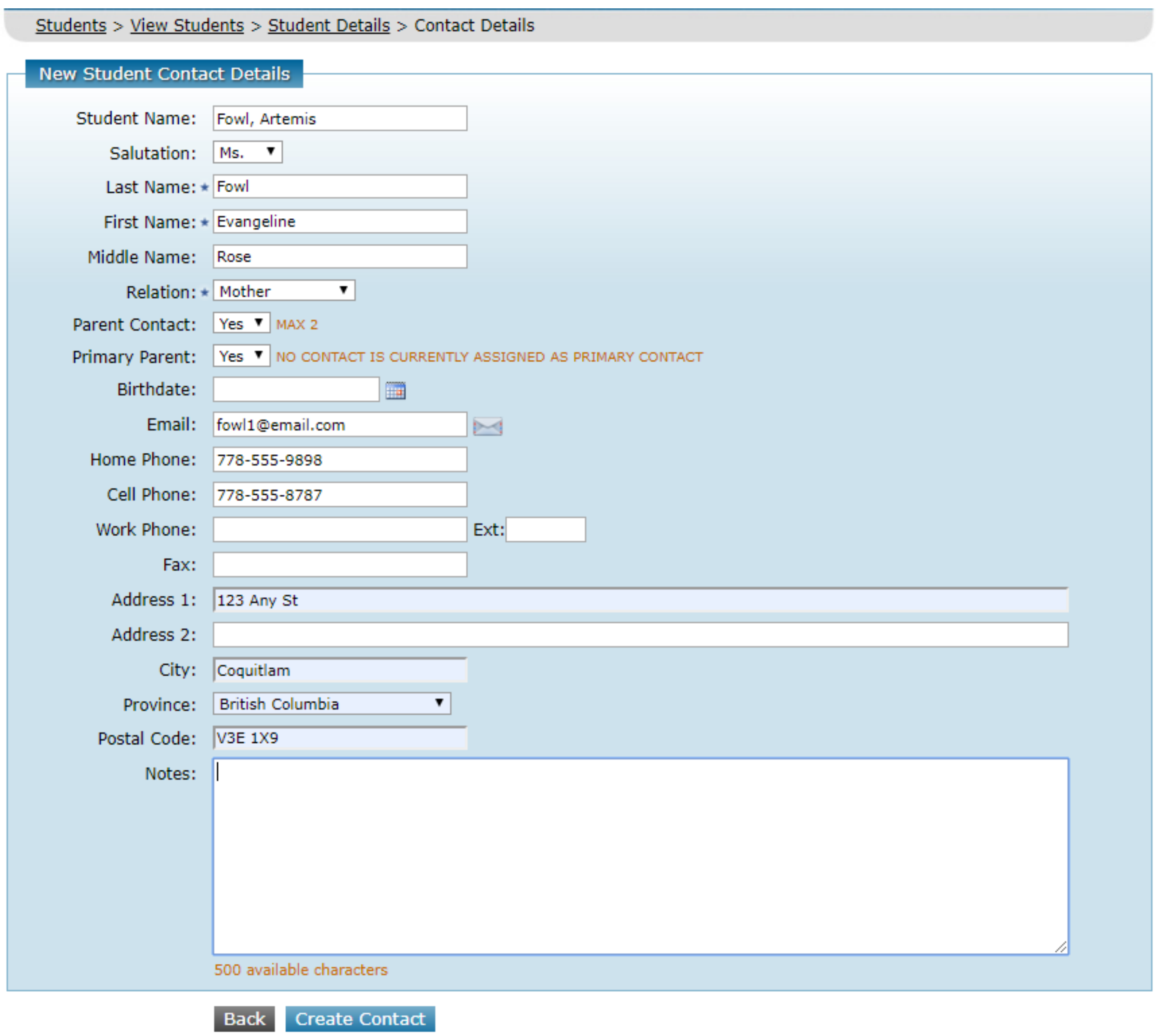
Contacts Tab

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.

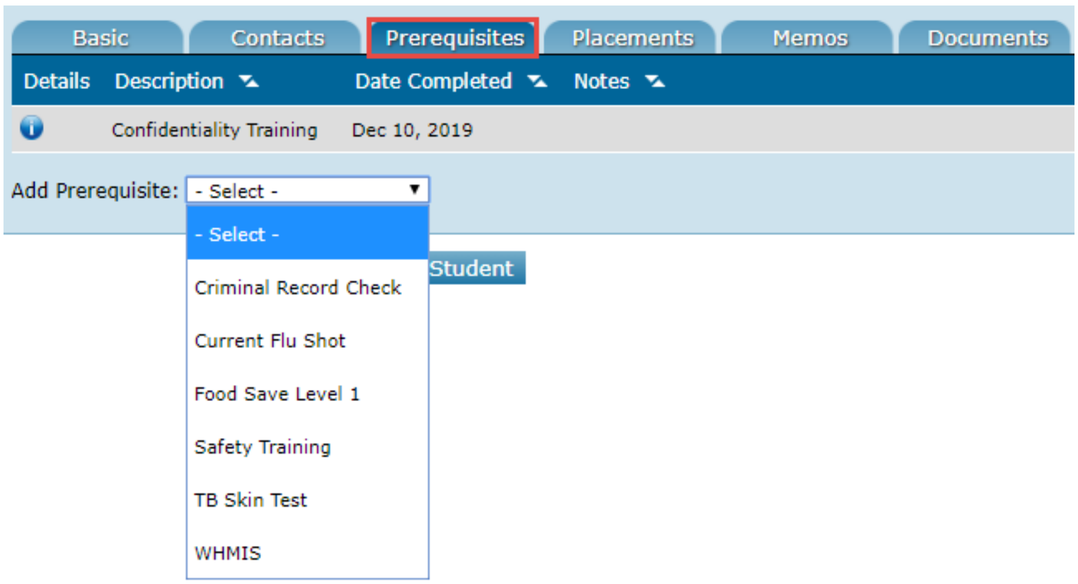
- **Notes:** Notes recorded for contacts are internal. Notes on contact records do not extract using the CSV Download function.



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.

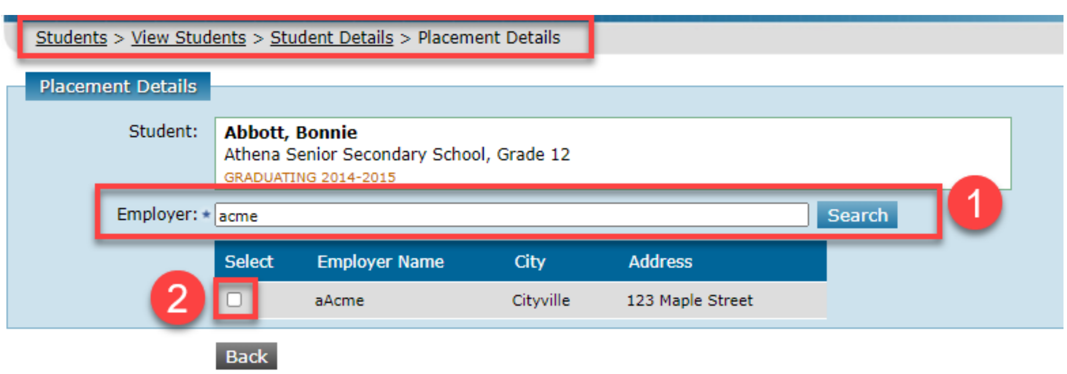


Placements Tab

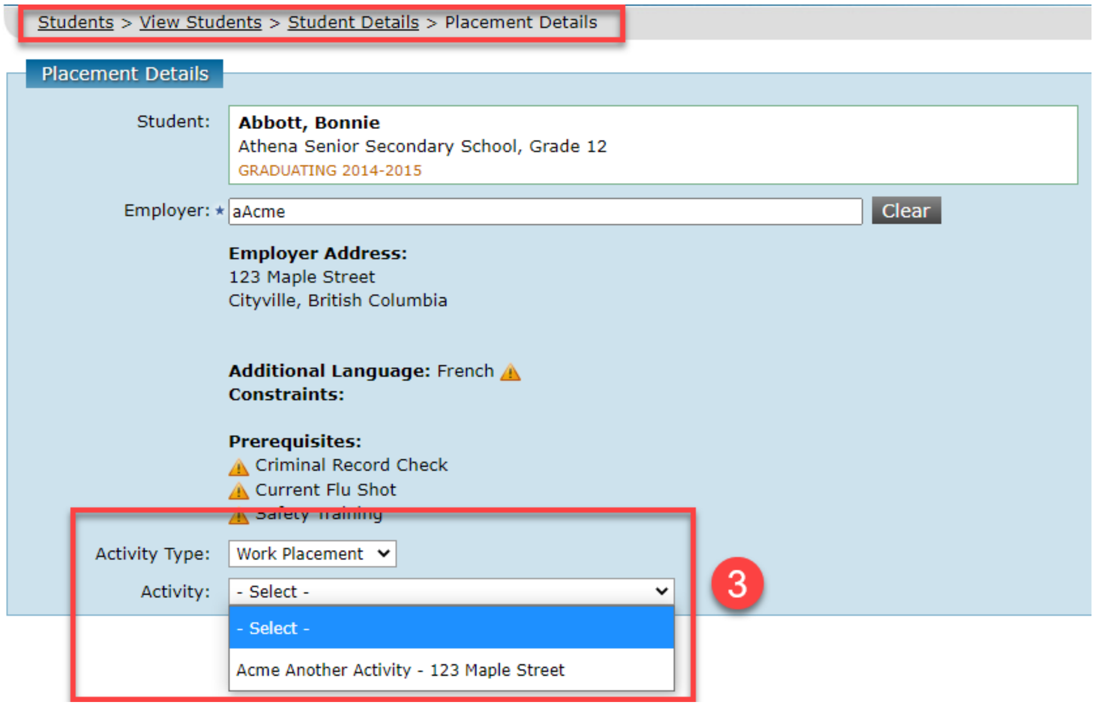
The Placements tab is used to assign students to employers for placements. Clicking Add Placement will generate a *Student Placement Details* screen. Confirm the correct student is selected at the top.

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.

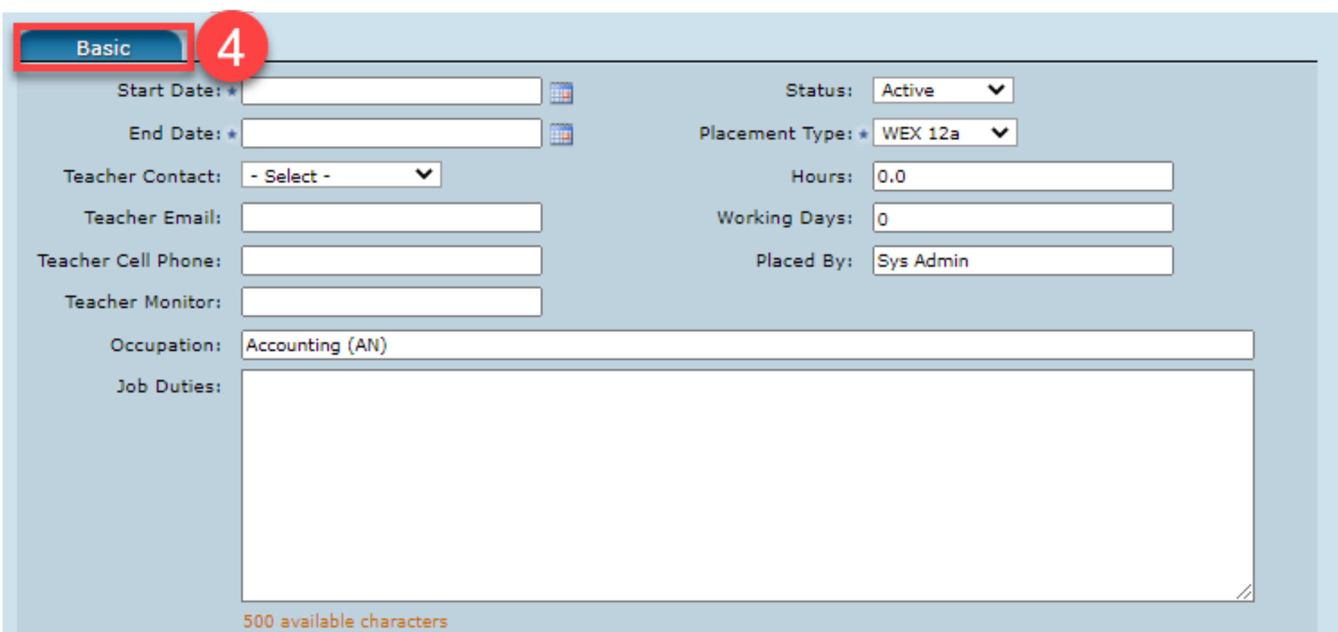
2. Check the box beside the employer the student will be placed with to begin the placement process.

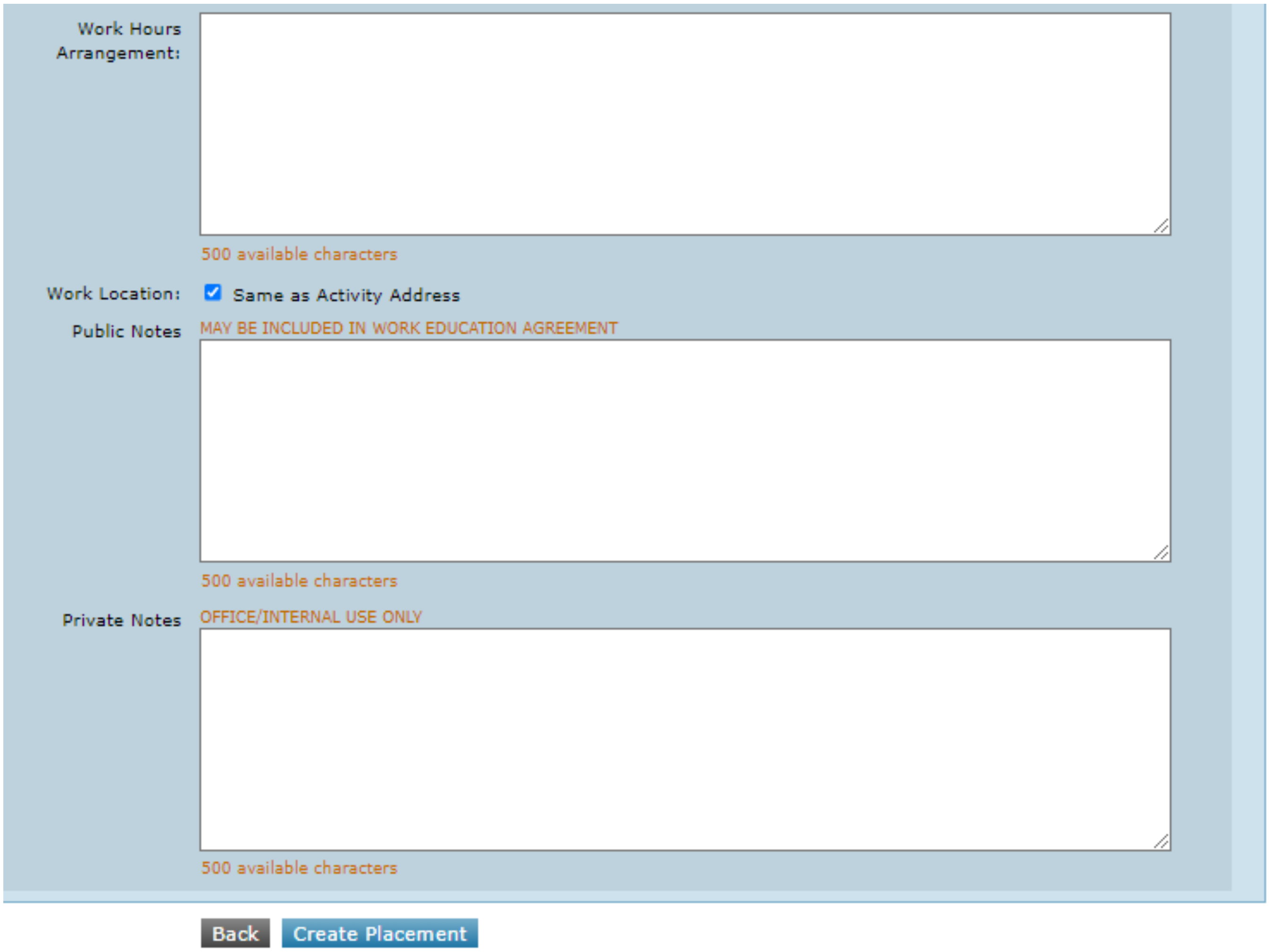


3. A new screen will appear to display the general employer details that apply to this placement. Select the **Activity Type** and **Activity** for the student's placement with this employer.



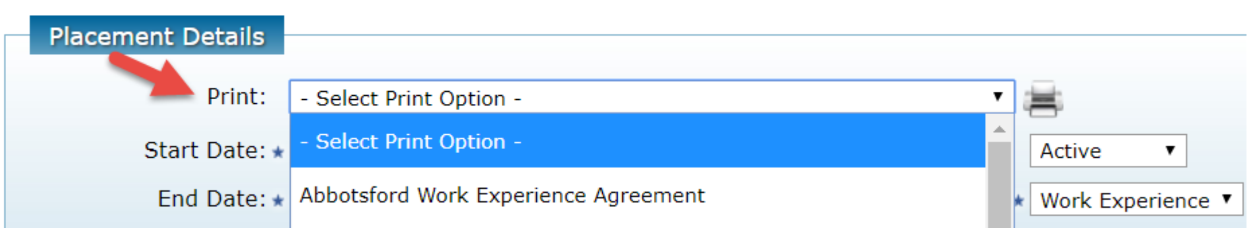
4. Additional information for the placement will be displayed. Populate the placement details as appropriate for this student/employer experience. Once completed, click the **Create Placement** button to create the record.



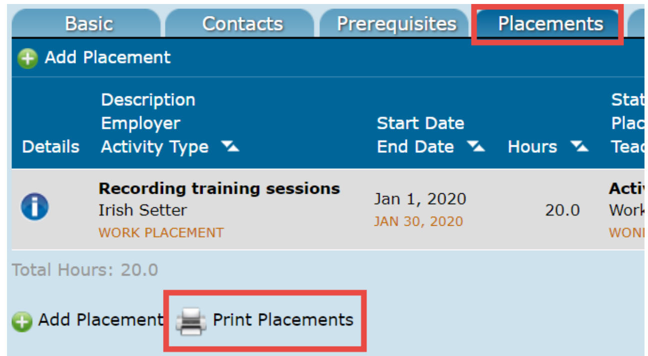


Printing WEX Agreements

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.



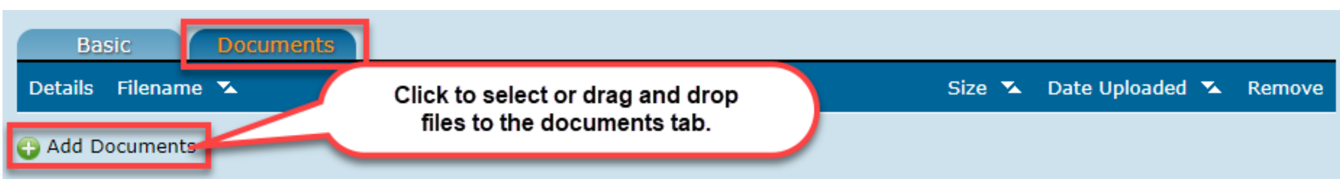
In the Placements tab, there is also a Print Placements button can be used to generate a placement summary for the student.



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.

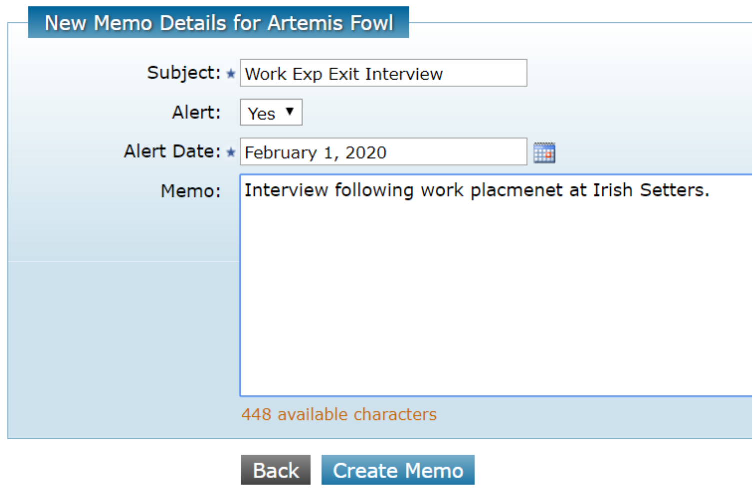
- **Add Document**: Provides the ability to load one document, chosen from a location on the user's computer.
- **Enhanced Add Documents**: Provides "drag-and-drop" ability for multiple files to the **Documents** tab.



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.

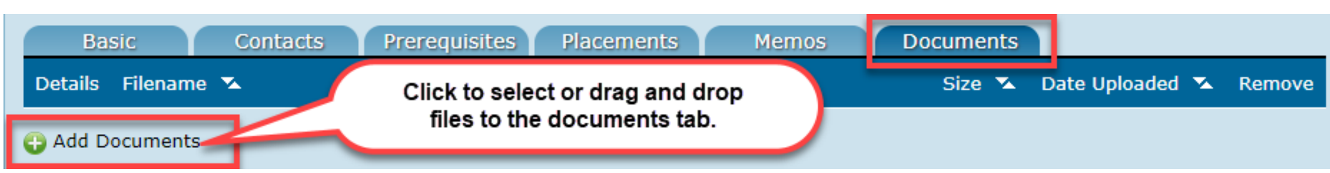
1. Use the Add Memo button to generate the *New Memo Details* screen.
2. Enter a brief subject area for the memo.
3. If the memo requires follow-up, set the Alert field to Yes. When the date field appears, select a date by which the memo by which the action should be taken.
4. Notes to provide additional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



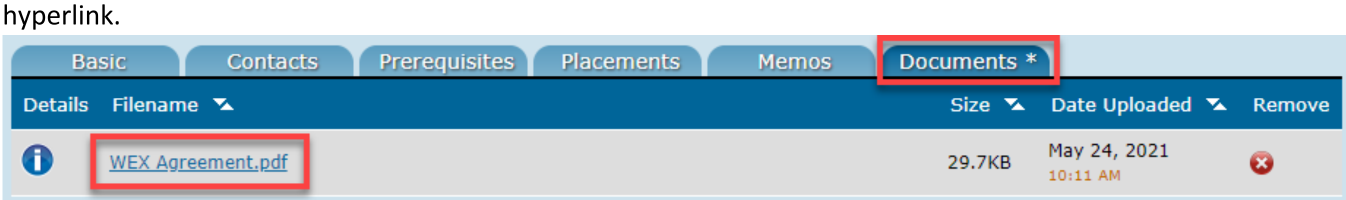
Documents Tab

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.



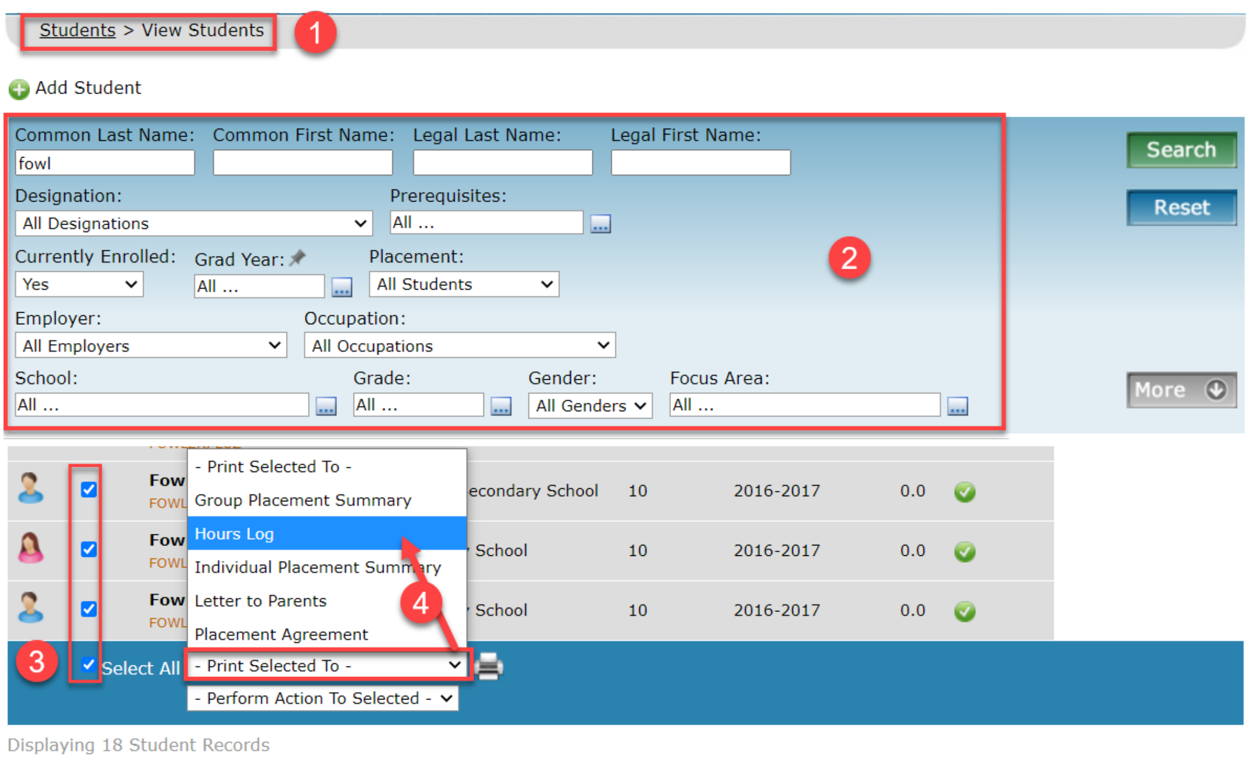
9.0 Student Mass Actions

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.

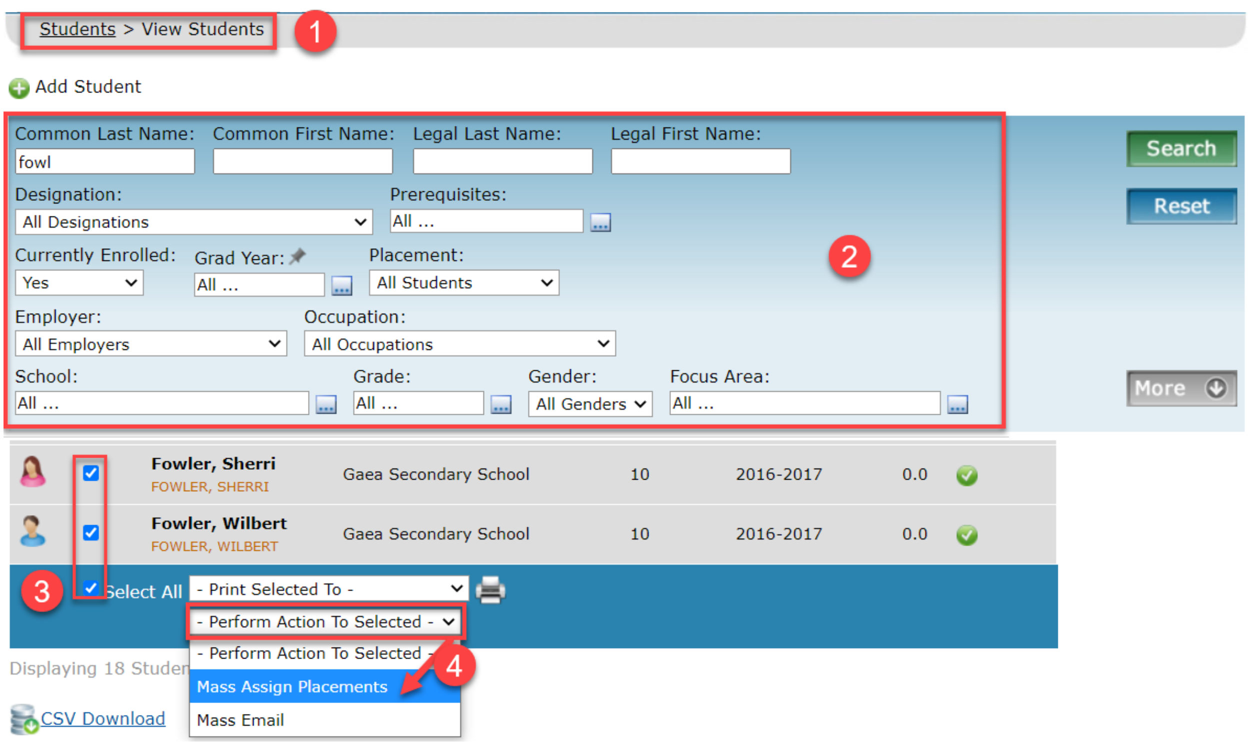


Perform Action to Selected

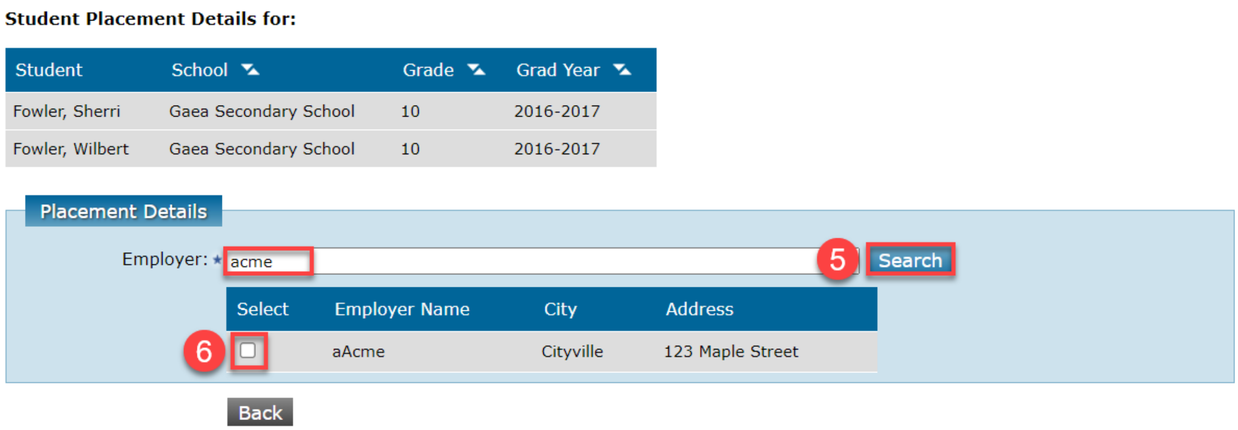
When filtering for students in **Students > View Students**, the user has the ability to mass assign placements or mass email students.

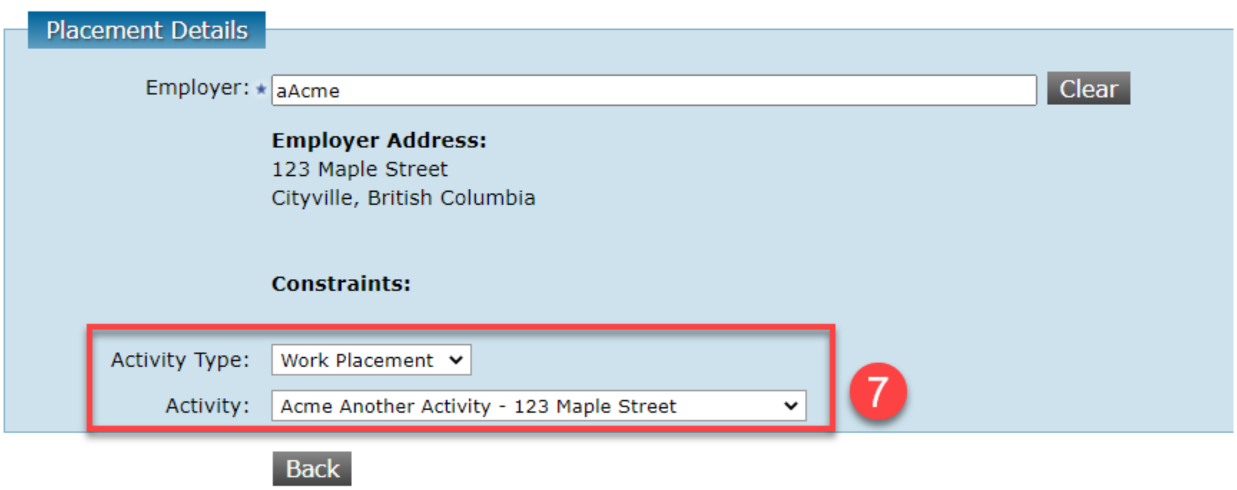
Mass Assign Placements

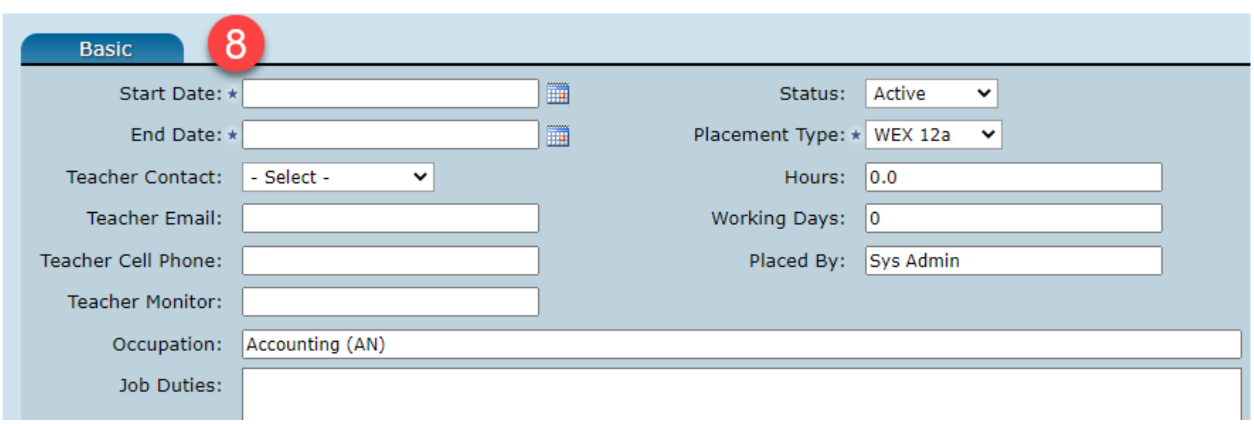
1. Go to **Students** > **View Students.**
2. Filter for the students requiring the same placement.
3. Select individual students in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Perform Action to Selected** dropdown menu, select **Mass Assign Placements**.
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.

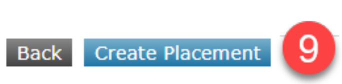



Students > View Students > Placement Details


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: *
acme
5
Search
Select
Employer Name
City
Address
6
aAcme
Cityville
123 Maple Street
Back

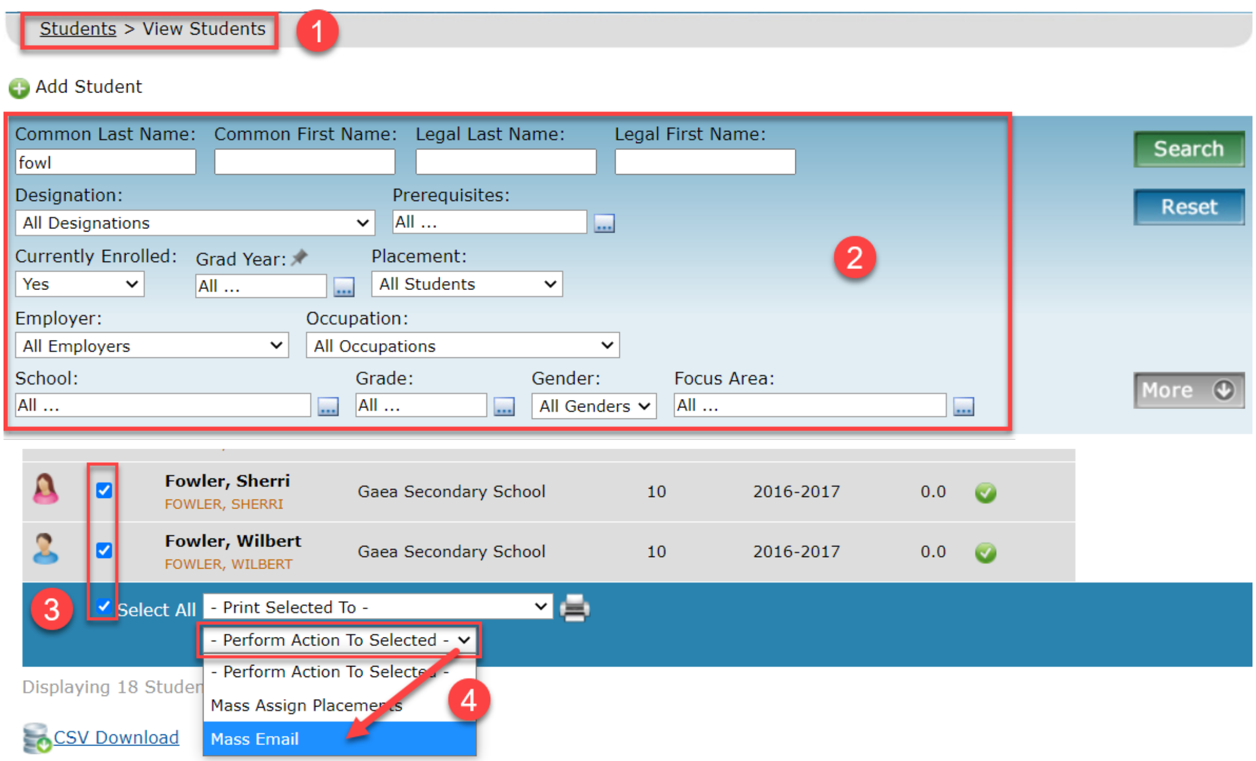

Placement Details
Employer: *
aAcme
Clear
Employer Address:
123 Maple Street
Cityville, British Columbia
Constraints:
Activity Type:
Work Placement
Activity:
Acme Another Activity - 123 Maple Street
7
Back

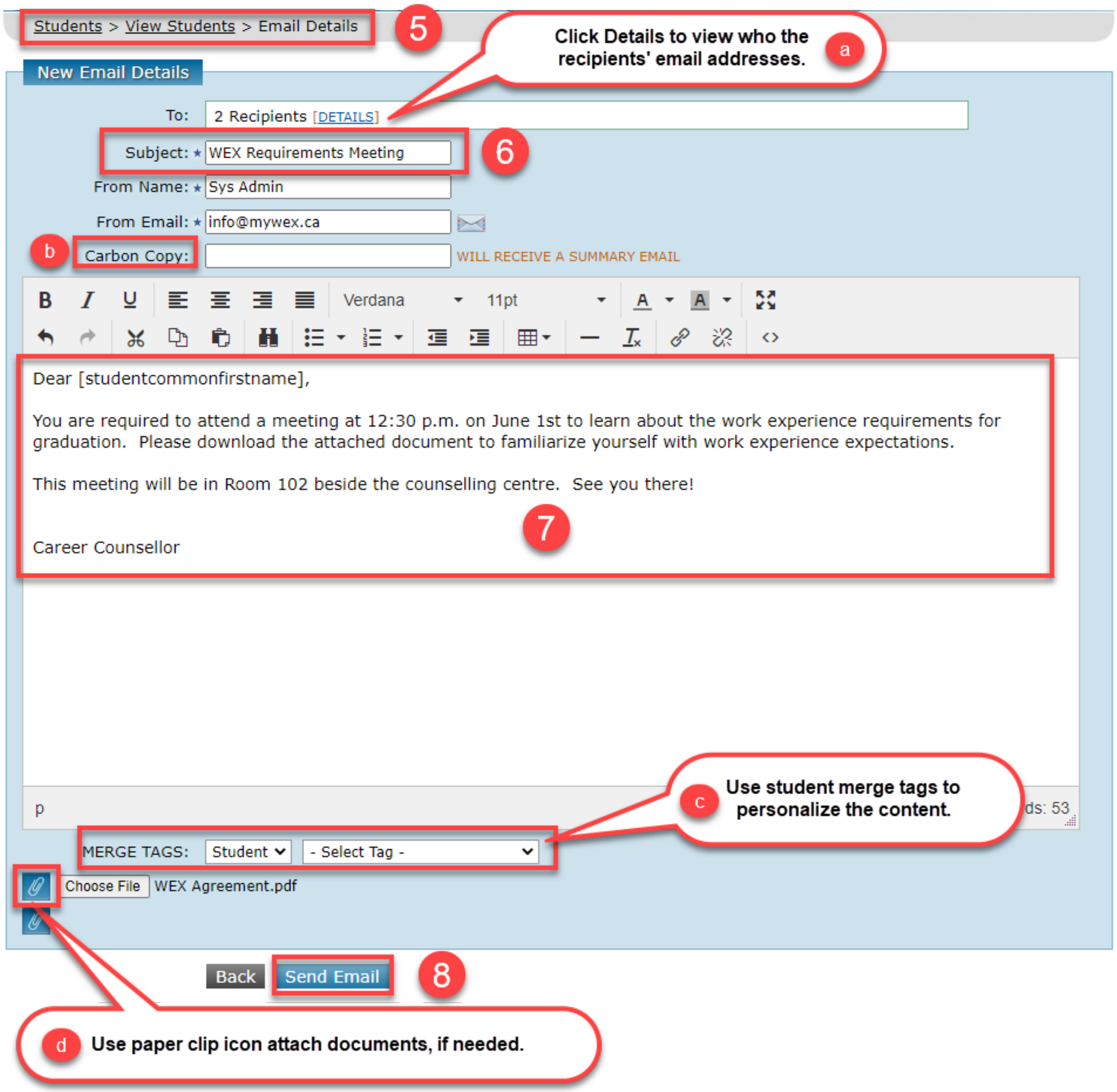

Basic
8
Start Date: *
End Date: *
Teacher Contact:
- Select -
Teacher Email:
Teacher Cell Phone:
Teacher Monitor:
Occupation:
Accounting (AN)
Job Duties:
Status:
Active
Placement Type: *
WEX 12a
Hours:
0.0
Working Days:
0
Placed By:
Sys Admin


Back
Create Placement
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.

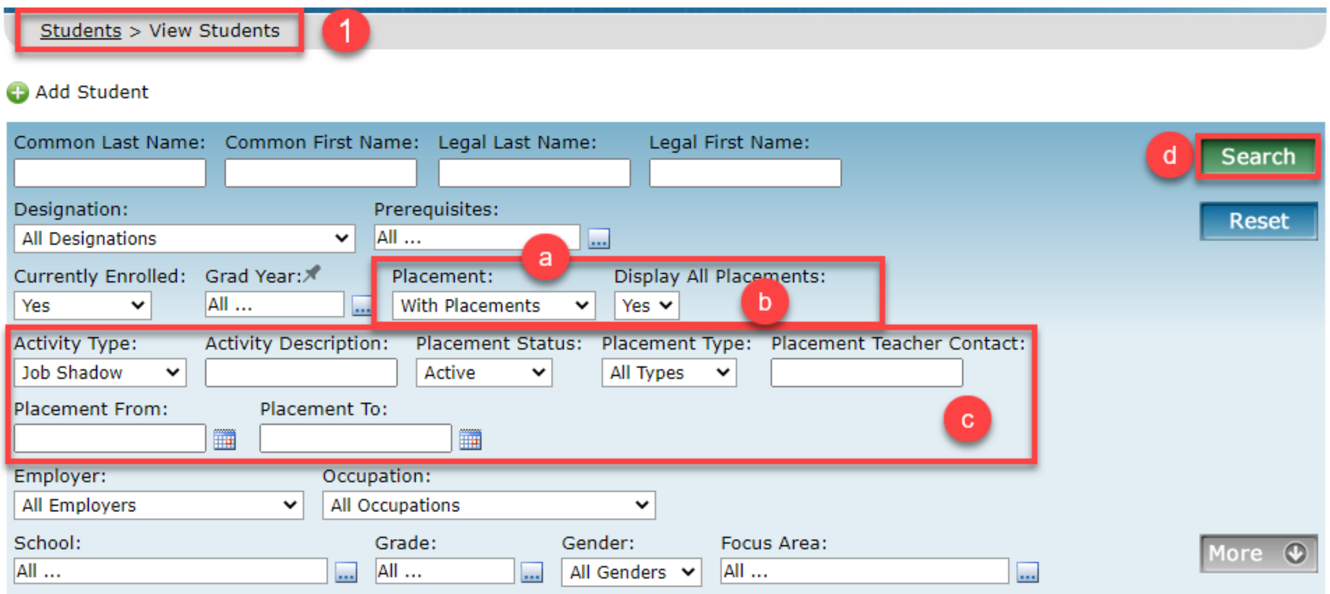



Students > View Students > Email Details
5
Click Details to view who the recipients' email addresses.
a
New Email Details
To:
2 Recipients [DETAILS]
Subject: ★ WEX Requirements Meeting
6
From Name: ★ Sys Admin
From Email: ★ info@mywex.ca
b
Carbon Copy:
WILL RECEIVE A SUMMARY EMAIL
Verdana
11pt
Dear [studentcommonfirstname],
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
Back
Send Email
8
d
Use paper clip icon attach documents, if needed.

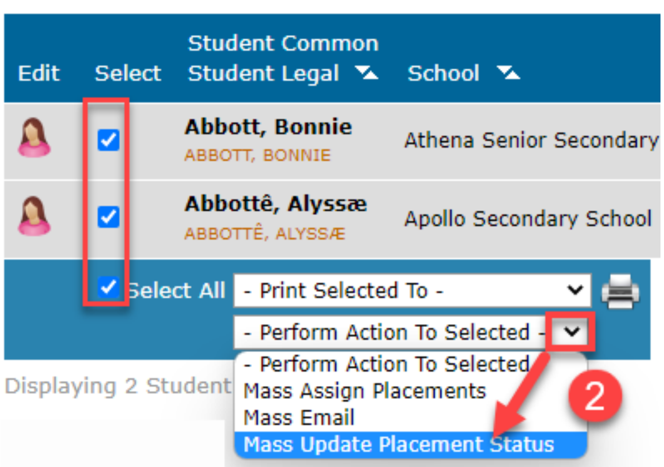
Mass Update Placement Status

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.

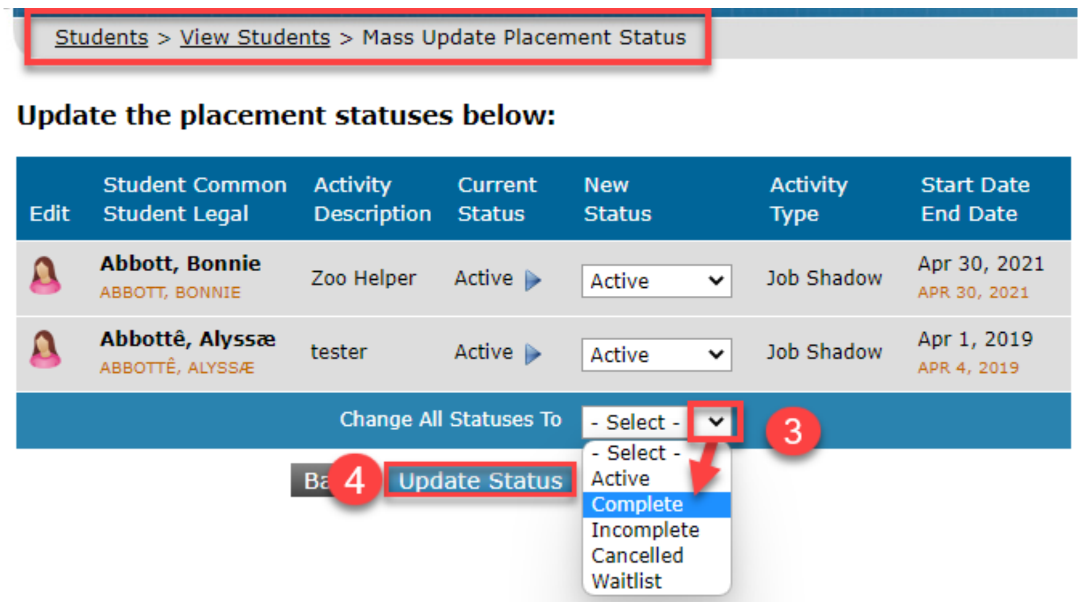


2. Check the box beside the students to be updated. In the **Perform Action to Selected** options at the bottom of the list and choose **Mass Update Placement Status**.



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.



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.

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.

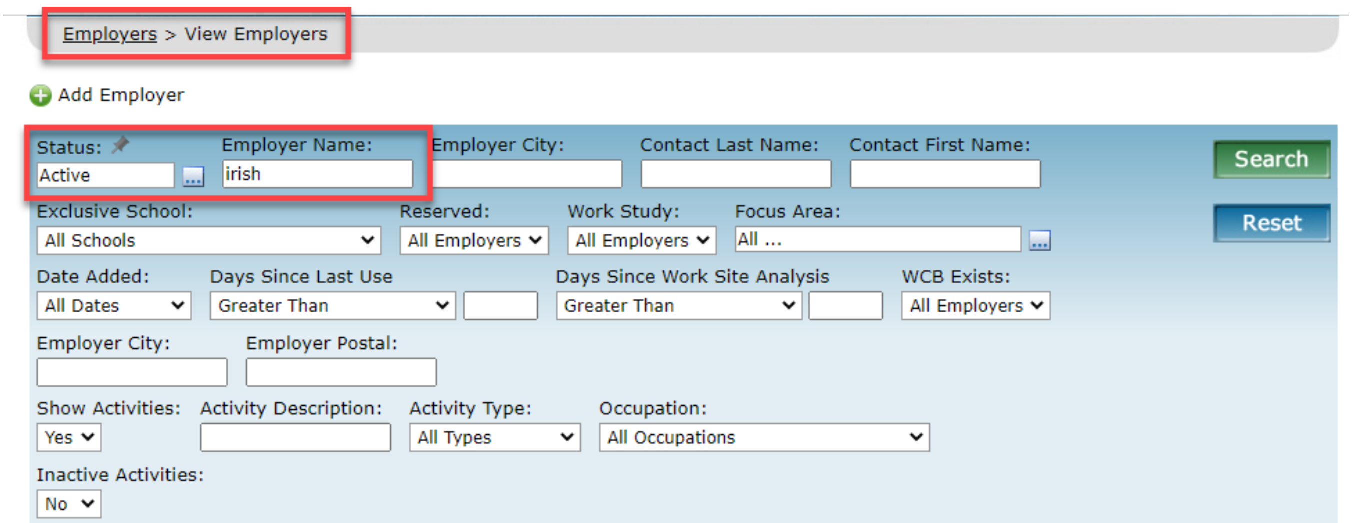
As explained in the *Filter Box* section of this guide, the View Employers filter box contains a combination of:

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

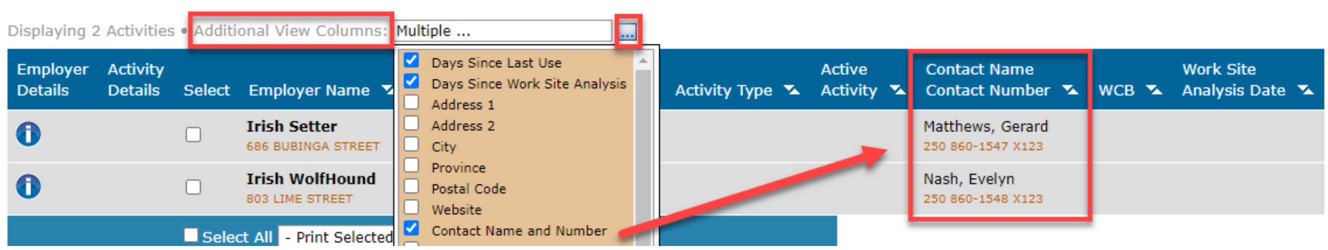
Remember: “Reset” can be used to clear selections if too many filters have been applied and the expected results are not returned. However, “sticky” fields (such as the “Status” field with the push pin icon), are not reset.

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.



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

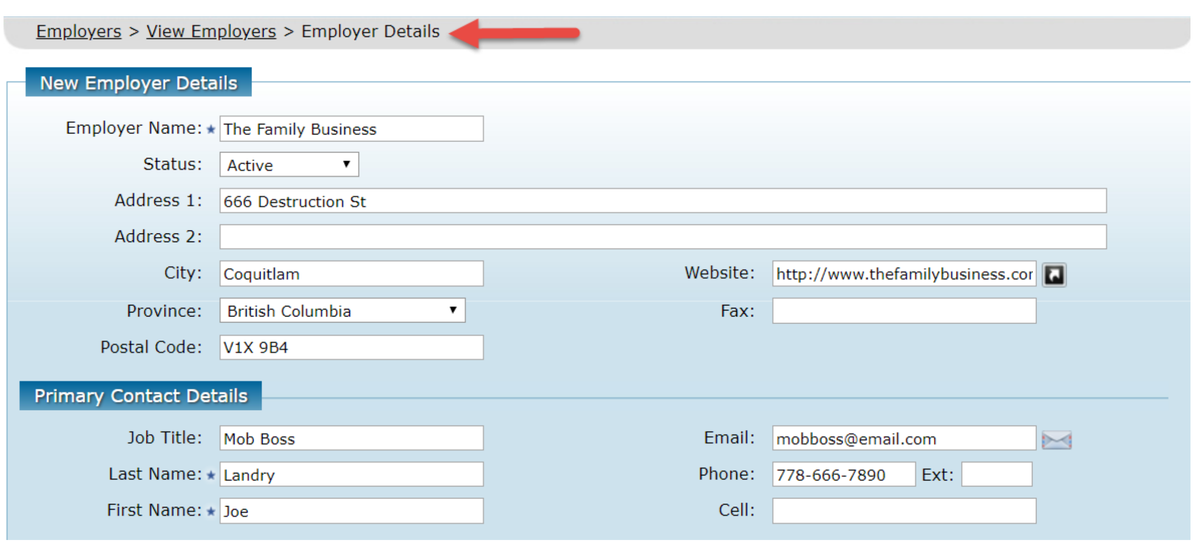


Note that below the list of employers, the user can select some, or all, of the employers in the list and generate letters, perform mass actions, or download details for the selected records. Details on these functions are provided in the *Employer Mass Actions* section of this guide.

Add Employer - The Employer Record

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

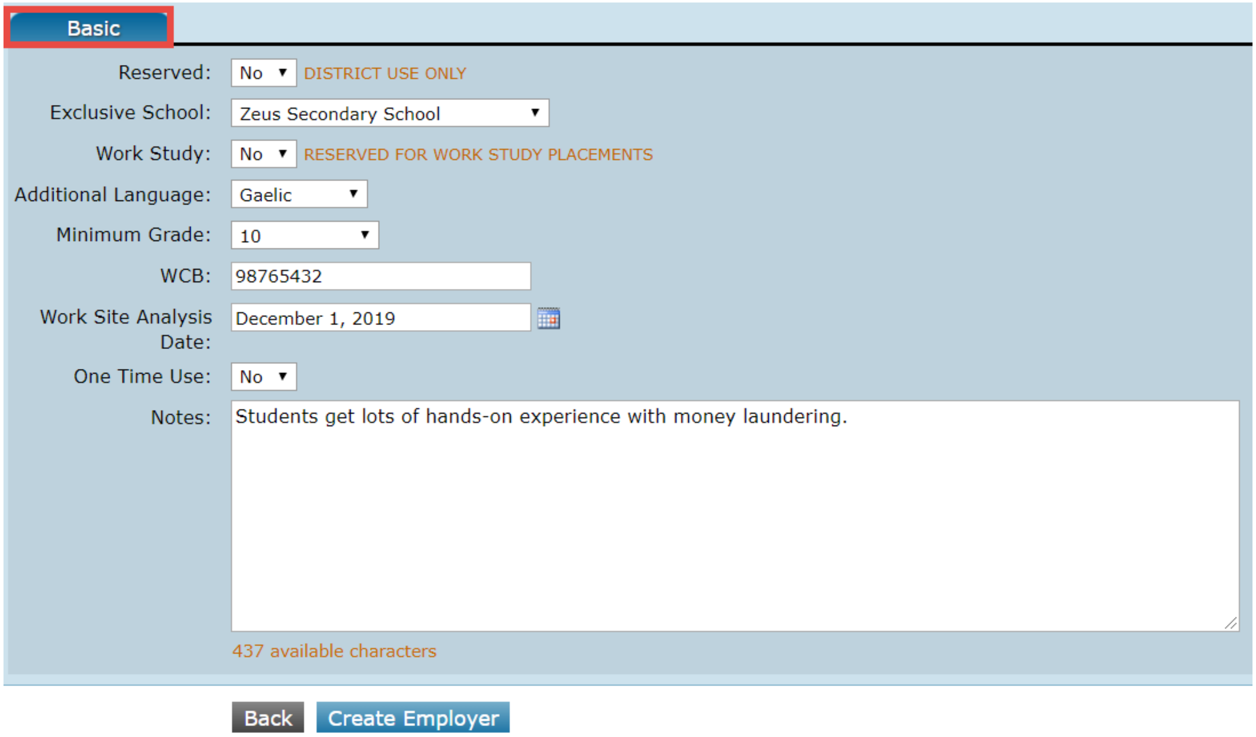
Employer Details will display at the top regardless of the tab selected.	
Employer Name	Enter the name of the business.
Status	• **Prospective**: For employers that are being reviewed for work experience placements. • **Active**: For employers that are ready to accept work experience placements. • **Temp 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.	



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.	



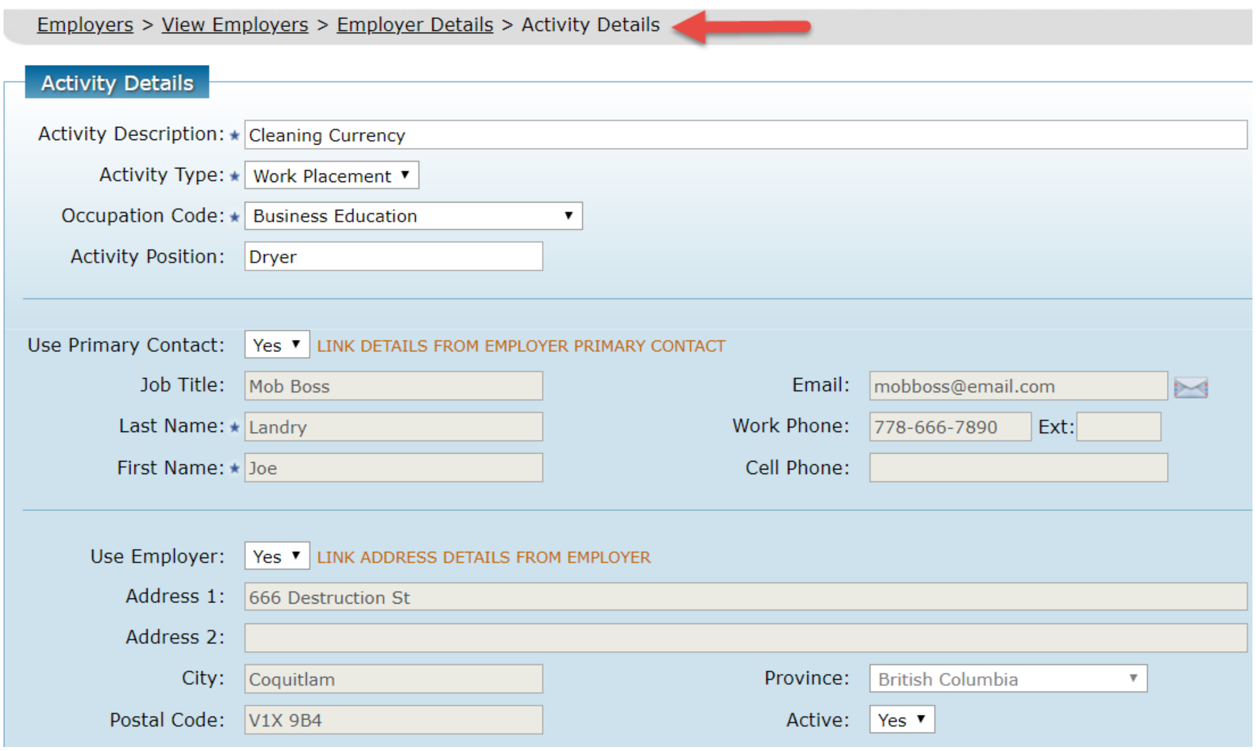
Activities Tab

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 *Employer Details* 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 *Employer Details* 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:

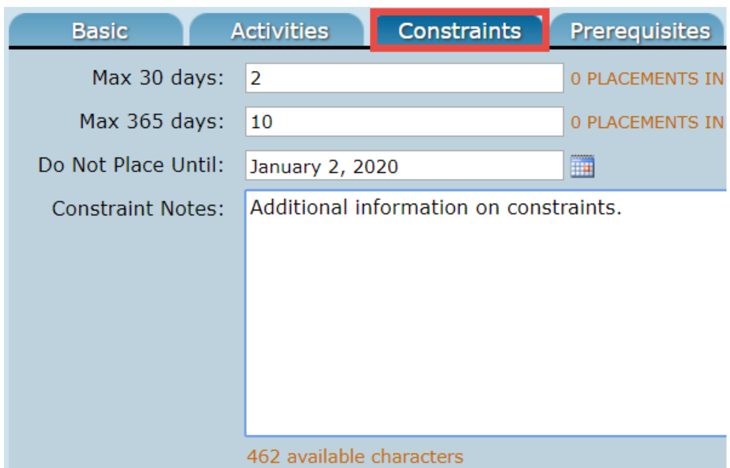
- **Basic:** Provides fields to record additional information about the placement, such as: Dress code, safety equipment, job duties, work hours and notes about the employer.
- **Memos:** Enables the user to record memos about the employer. Memos can be set as Alerts to generate a notification on the 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.



Constraints Tab

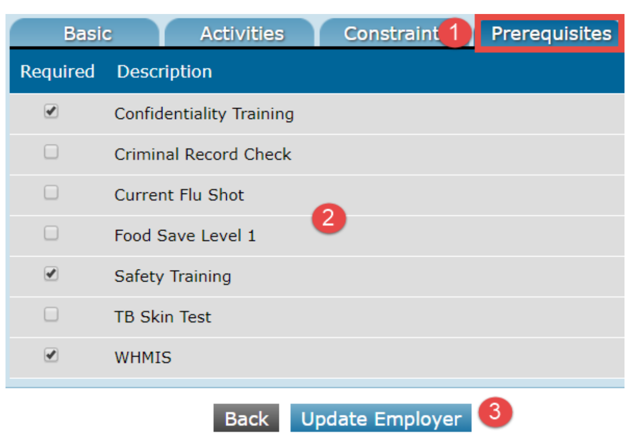
Constraints on an employer's record can be used to limit the number of placements to the employer.

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.	



Prerequisites Tab

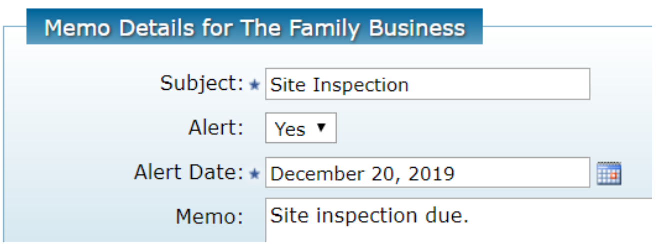
Prerequisites can be checked on the employer record. When a student is placed, the prerequisites on the employer record are compared to those on the student record. Flags will appear to show if the student has the prerequisites required for the employer.



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.

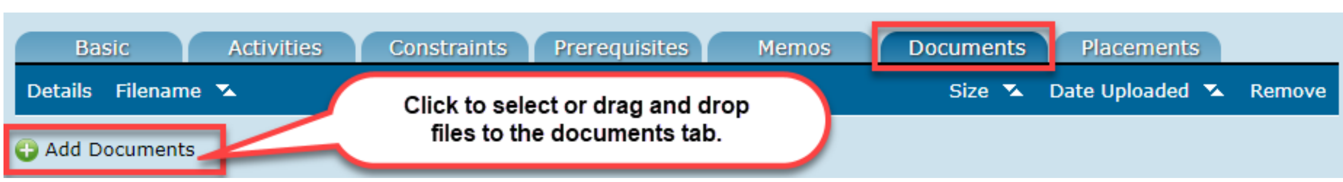
1. Use the Add Memo button to generate the *New Memo Details* screen.
2. Enter a brief subject area for the memo.
3. If the memo requires follow-up, set the Alert field to Yes. When the date field appears, select a date by which the memo by which the action should be taken.
4. Notes to provide additional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



Documents Tab

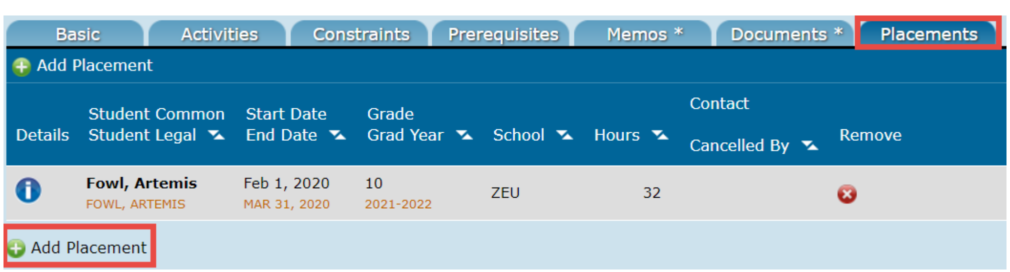
The documents tab can be used to keep an electronic record of employer contracts, agreements, or any other information relevant to the employer record. Maximum document size is 5 MB per document.

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.



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.

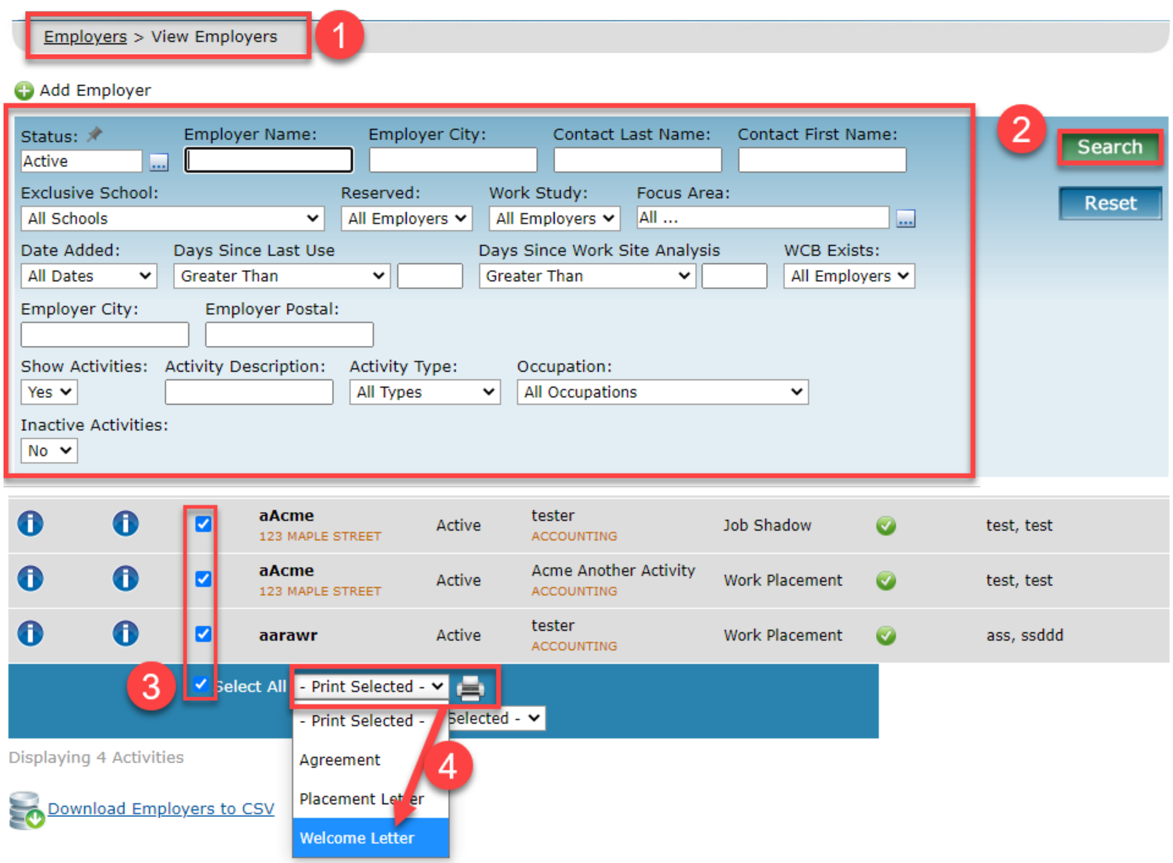


11.0 Employer Mass Actions

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 Employersin 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.

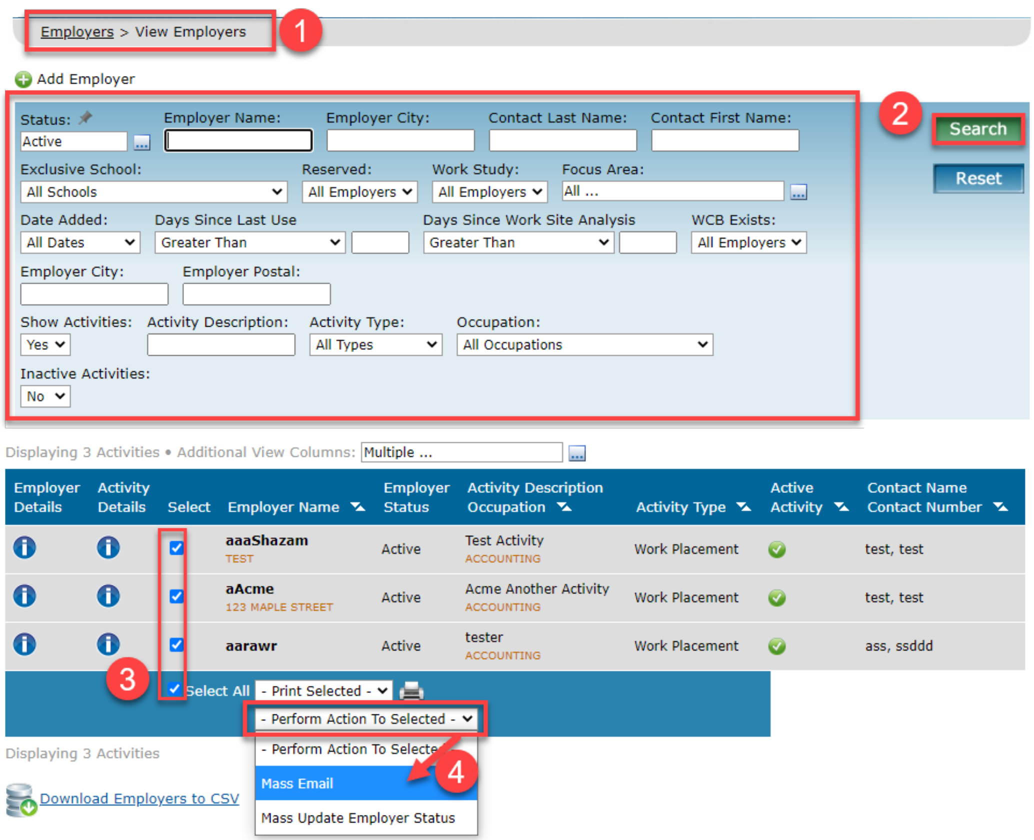


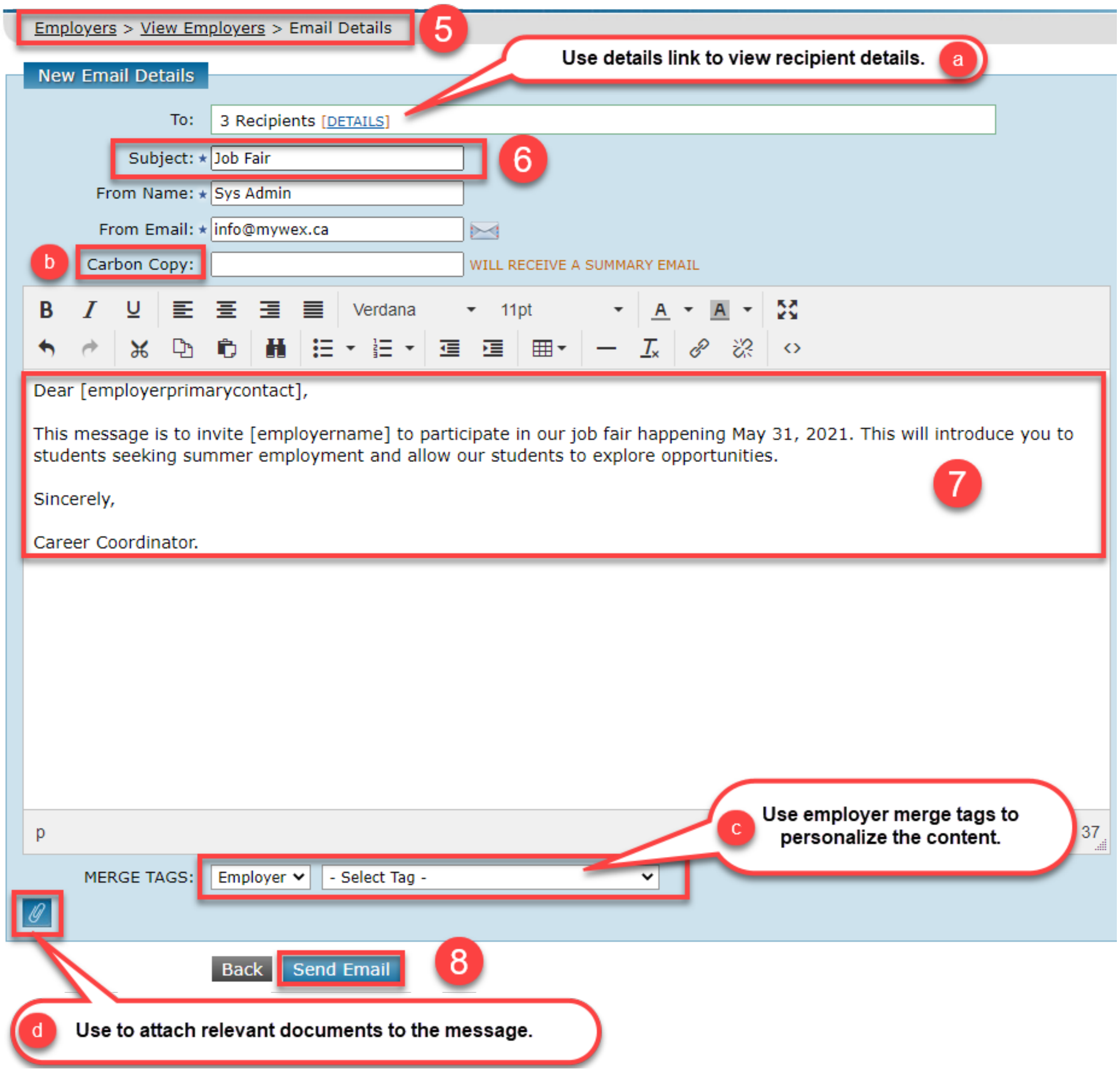
Perform Action to Selected

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

Mass Email

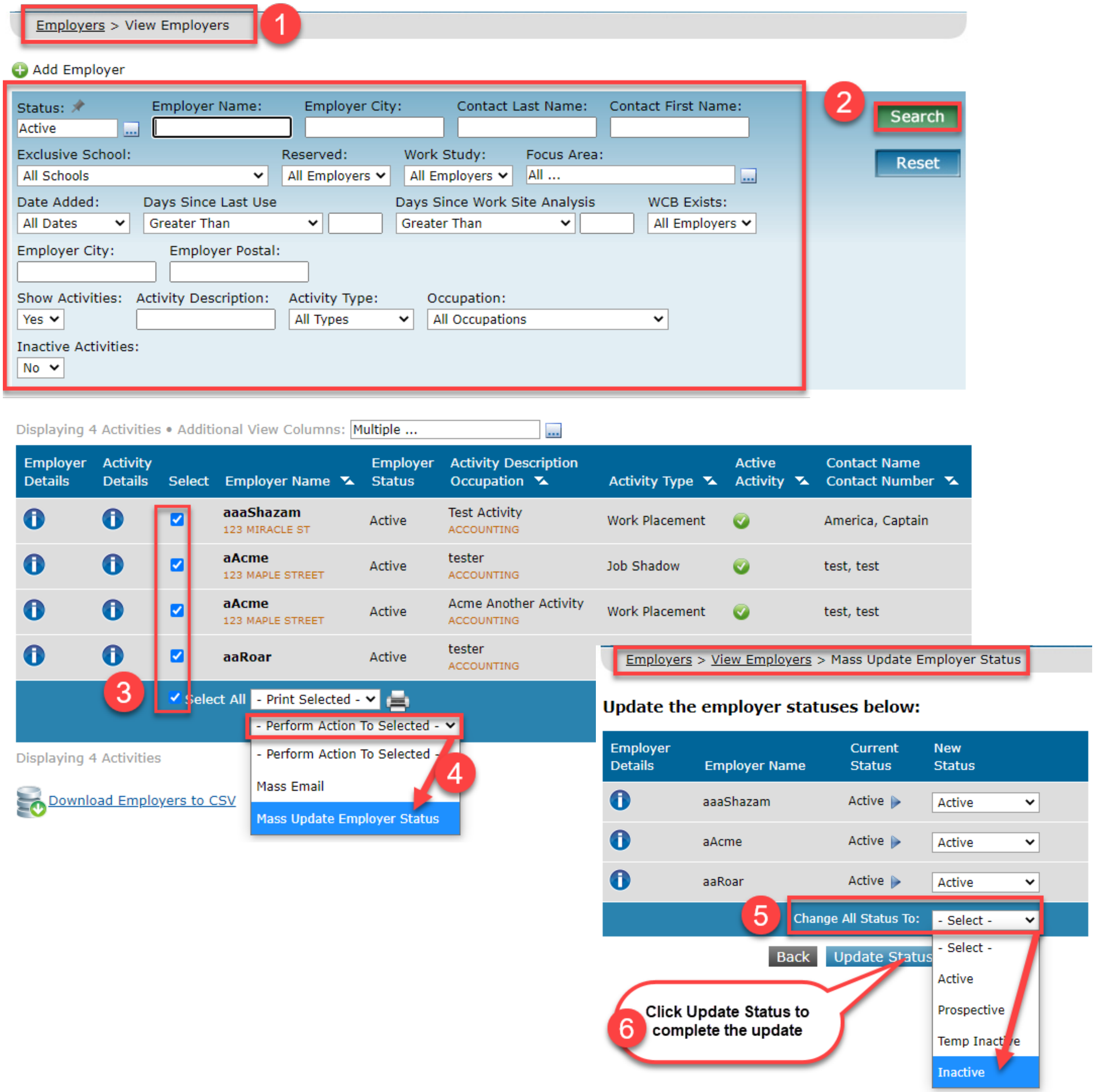
1. Go to **Employers** > **View Employers.**
2. Filter for the employers requiring the same email.
3. Select individual employers in the list or tick the **Select All** checkbox to select all records in the list.
4. In the **Perform Action to Selected** dropdown menu, select **Mass Email**.
5. In the *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.




Employers > View Employers > Email Details
5
Use details link to view recipient details.
a
New Email Details
To: 3 Recipients [DETAILS]
Subject: * Job Fair
6
From Name: * Sys Admin
From Email: * info@mywex.ca
b
Carbon Copy:
WILL RECEIVE A SUMMARY EMAIL
Verdana
11pt
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.
7
p
37
c
Use employer merge tags to personalize the content.
MERGE TAGS: Employer - Select Tag -
Back
Send Email
8
d
Use to attach relevant documents to the message.

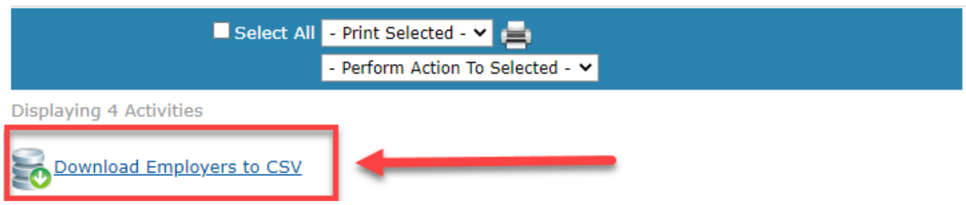
Mass Update Employer Status

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.



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.



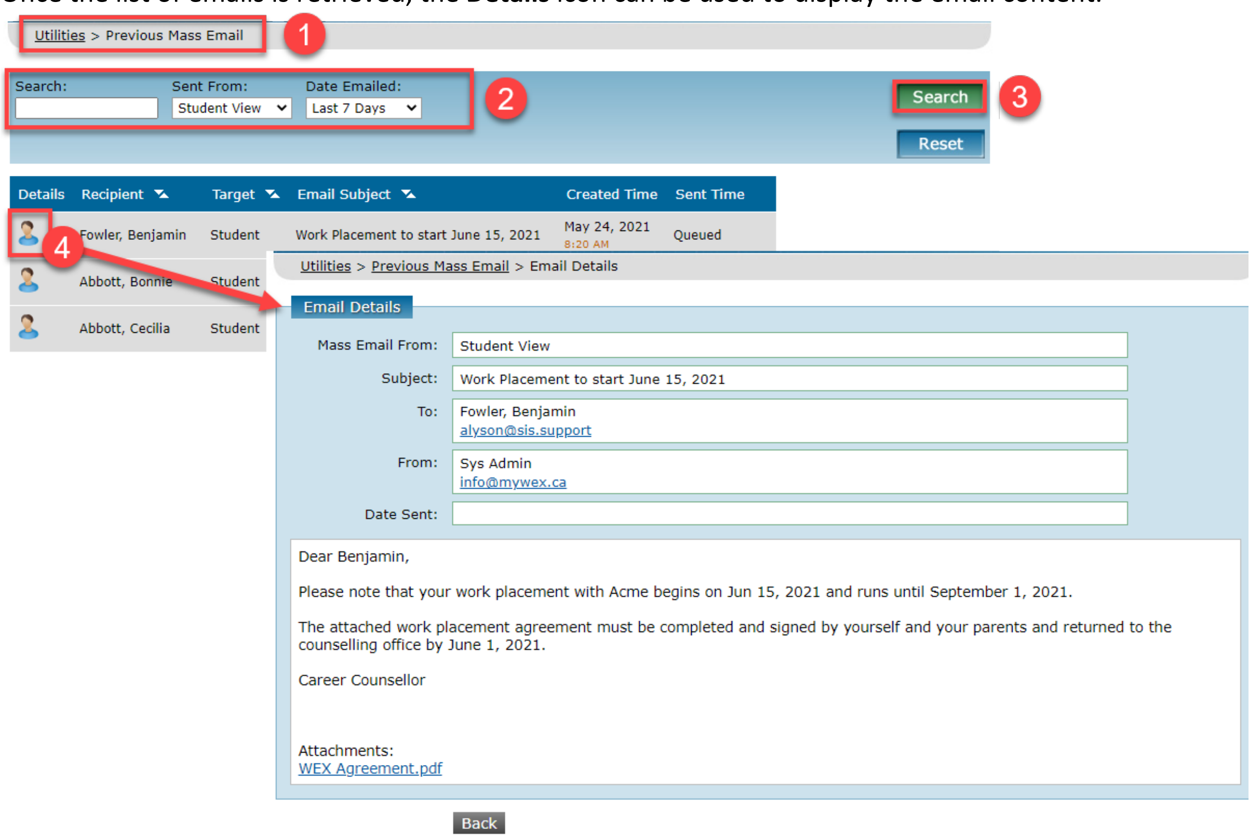
12.0 The Utilities Menu

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.

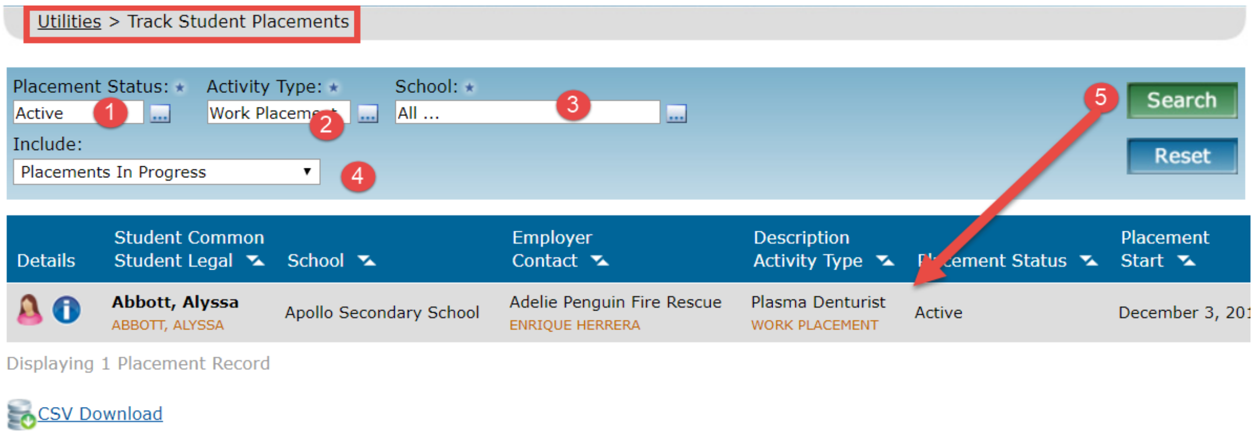
Once the list of emails is retrieved, the **Details** icon can be used to display the email content.



Track Student Placements

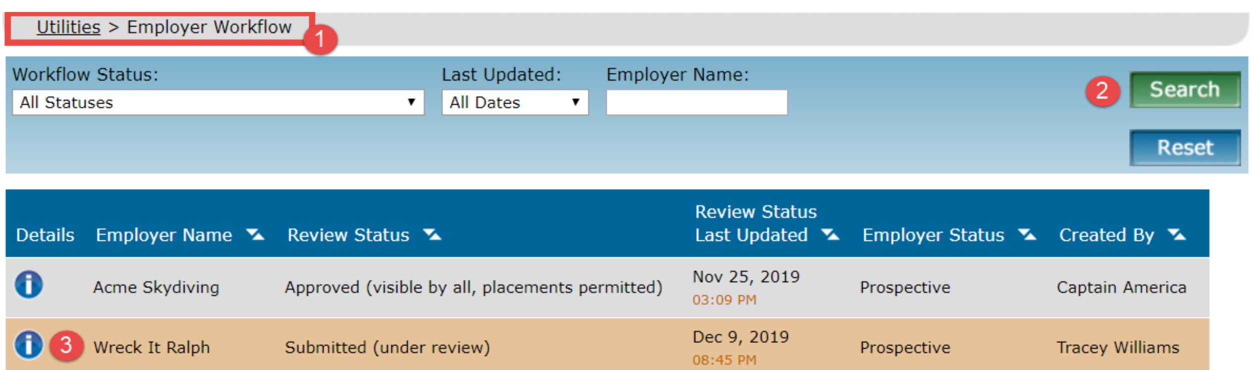
This utility generates a list of students in placements based on the criteria in the filter box at the top.

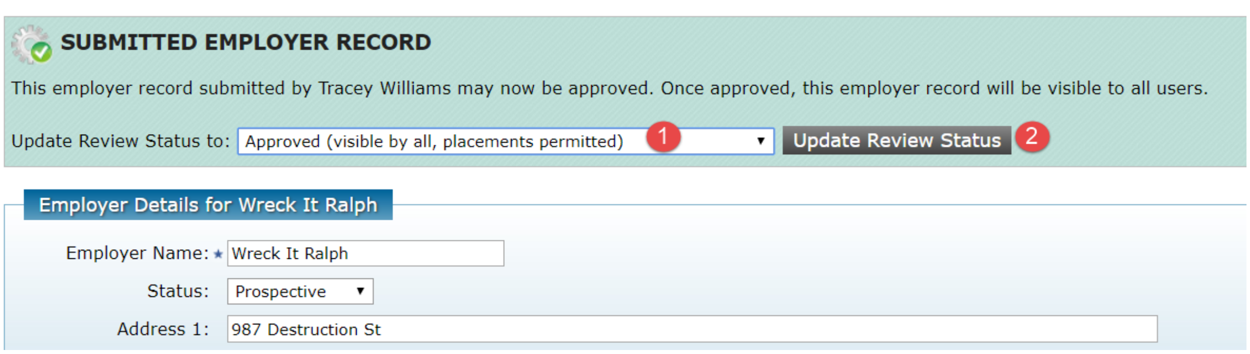
These records may also be extracted to a spreadsheet using the CSV Download function.



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.





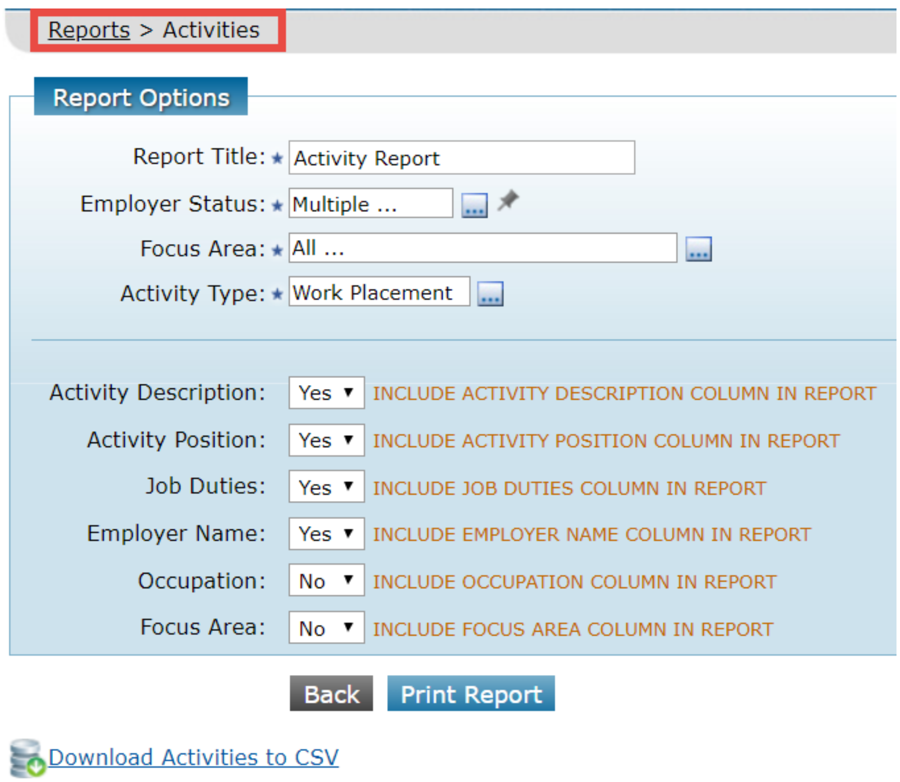
13.0 The Reports Menu

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.



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
Utilities > Employer Workflow	V	V/C*	V	V/C/M/D
Reports > Activities	N	N	C	V/C/M/D
Reports > Activities > Download Activities to CSV	N	N	C	V/C/M/D
Admin > Manage Activity Types	N	N	V	V/C/M/D
Admin > Manage Designations	N	N	V	V/C/M/D
Admin > Manage Focus Areas	N	N	V	V/C/M/D
Admin > Manage Languages	N	N	V	V/C/M/D
Admin > Manage Letters	N	N	V	V/C/M/D
Admin > Manage Occupations	N	N	V	V/C/M/D
Admin > Manage Placement Types	N	N	V	V/C/M/D
Admin > Manage Prerequisites	N	N	V	V/C/M/D
Admin > Manage Schools	N	N	V	V/C/M/D
Admin > Manage Users	N	N	N	V/C/M/D
Admin > Import Students	N	N	N	V/C/M/D
Admin > System Settings	N	N	N	V/C/M/D
Help > Online Help	V	V	V	V/C/M/D
Help > Technical Support	N	N	N	V/C/M/D
Help > About myWEX	V	V	V	V/C/M/D