Workshop Wizard Data Entry Quick Guide

WV Health Connection

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Login: Logging on the Website

- Log on to the Workshop Wizard website (wv.workshopwizard.net) using the **Userid** and **Password** provided, then hit the login button.

- On the left side of the screen, you will then see the access **Tabs** that have been pre-set for your use. The total number and the names of the **Tabs** you see will be determined by the areas that have been pre-set for you. Therefore, they may not be the same as the images in this manual.

- If someone tries to login using an incorrect **Userid** and/or **Password,** they will be allowed to try a total of five times. If they are still not using the correct **Userid** and/or **Password,** they will be locked out. The Administrator (the Office of Health Services Research team) will need to reset the **Userid** and/or **Password** (you can reach us at wvhealthconnection@gmail.com).
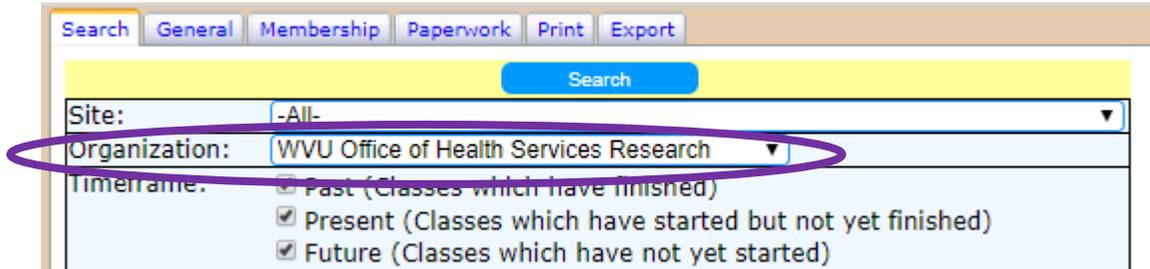
- If Workshop Wizard is busy processing your request, you'll see a "busy" indicator like this at the top of the main menu.
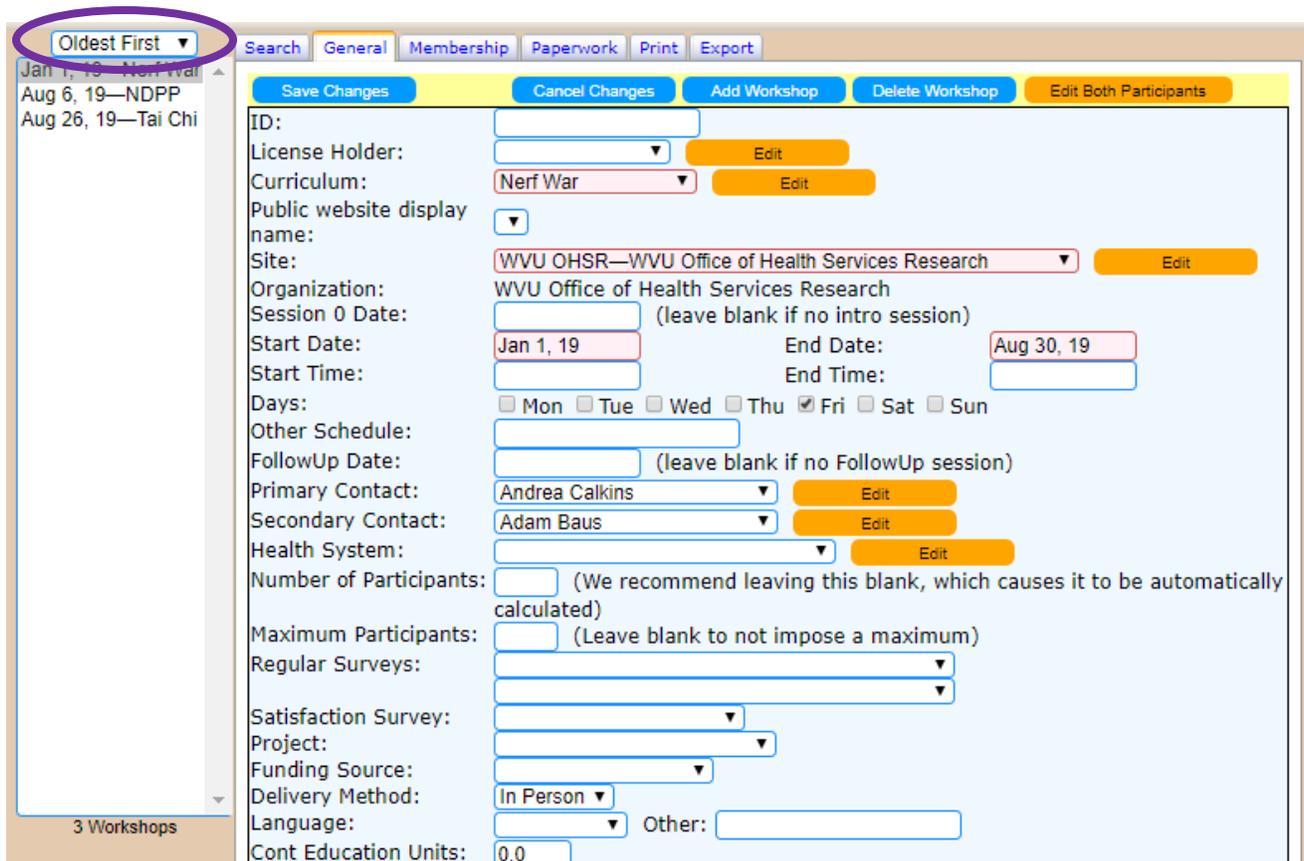
Workshops/Trainings Tab

General Notes on the Workshops/Trainings Tab

- On the **Workshops** tab (green column on the left), you are able to search by your organization.

- After clicking the **Search** button, you will see your Workshops listed on the side column.

- From here you can select the order in which the workshops will be listed as **Oldest First** or **Newest First.**

Adding a New Workshop/Training

- To add a workshop, first click on the **General Tab** and then the blue **Add Workshop** button.

- All the required fields are in red. Add the information into each field. If the **Site** (location of the program) you need for the workshop is not listed in the drop-down menu, please contact the Administrator (reach out to us at the Office of Health Services Research team with wvhealthconnection@gmail.com).

- Make sure to save any changes by clicking on the blue **Save Changes** button.

Membership on the Workshops/Trainings Tab

- On the **Membership Tab** you can search for and choose the **Leaders** for your workshop.

- Make the edits as needed and remember to click on the blue **Save Changes** button.

- If the **Leader** you need to select is not listed in the drop-down menu, please contact the Administrator (reach out to us at the Office of Health Services Research team with wvhealthconnection@gmail.com).

Participants Tab

Select the **Participants Tab** (green column on the left), and then select the **General Tab**.

- o The **Participant Tab** has two parts: the data from **Session 1** and **Other** data.
- o Under the Session 1 Form, select the **Add Participant** button.
  - o Add the information into each field for each participant.
- o Make sure to save any changes by clicking on the blue **Save Changes** button.

My Workshops

- Program leaders can view and print only their own specific workshops from this tab.
- After choosing **My Workshops** (green column on the left) you will see two tabs at the top of the screen: **Print Roster** and **Manage Workshops**.
- The **Manage Workshops Tab** will only show to those who are listed as a leader in the **Workshops Tab.** Workshop participants' progress may also be viewed, printed, or emailed from this tab.
- To be able to see all of the workshops you have managed, make sure to select the **Include workshops which are completed** button. This will show past workshops along with ones that are occurring or will be occurring in the future.

Print Roster | Manage Workshop Sessions

To manage a workshop, choose it from the list:

Aug 26, 19—WVU Office of Health Services Research—Tai Chi

☐ Include workshops which are completed
☐ Include workshops I'm not leading or coordinating

Then click the button: Next >>

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Print My Workshop Roster

- To view a **Workshop Roster** select **Print Roster** from the list of available options. Participants will only appear on the roster if they have been entered in **Participants** using their first and last name.

- The roster for the selected workshop will be generated as a PDF file. You may then print the PDF or save it.

Print Roster | Manage Workshop Sessions

Choose the workshop/training:

Aug 26, 19—WVU Office of Health Services Research—Tai Chi

☐ Include workshops/trainings which are completed
☐ Include workshops/trainings I'm not leading or coordinating

Then click the button: **Print**

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WV Health Connection
PO Box 9190 | Morgantown, WV 26506-9190

Tai Chi

Name	Date of Birth	Phone	Email	Address

Data Entry

- To enter Workshop information select the **Manage Workshop Sessions** button.
  - o Choose from the list of workshops then click the **Next** button.

  - o Now select the **Enter Session Data** button.

o To add one of the listed sessions within the workshop series you selected, click on the **Add a new session** bubble.

Choose a Session or Participant:

Use this session:	Use this participant:	◉ Add a new session
		○ Add several sessions

<< Prev   Next >>

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o Choose the **Use this session** bubble if you are adding a new session to the workshop series. Then click on the **Next** button.

- This screen will:
  - Show the **last session** on the calendar in green.

  - Choose a **likely date** for the new session and show it in red

  - Allow you to **select a different date** by clicking on that date.

  - The **likely date** is based on the date and type of the last session. If the last session was a general weekly (same day, every week) session, then the new session date will be one week later.

- After selecting the date of the session you want to enter data for, and then hitting Next, this is what you will see:

First Name	Last Name	Email Address	Attended Session
Cecil	Pollard		✔

- Add in the data for each participant and click the **Save Changes** button.
  - You will then receive the following message on your screen confirming the information has been saved and asking if you want to enter more data.

- If you are looking to add a different work shop (click the **Choose Workshop** button) or session for the current workshop (click the **Choose Session** button), you are able to do so from this page.
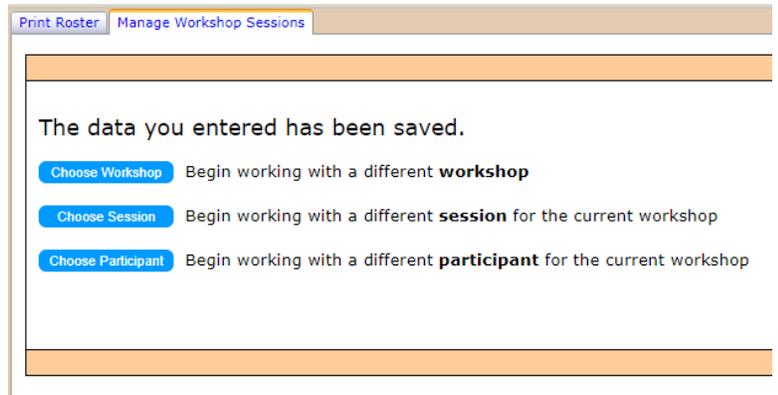
- The **Choose Participant** button shows on this screen but is currently not open yet (currently, clicking this will take you back to the **Manage Workshop Sessions** page). We will let you all know when this is available!
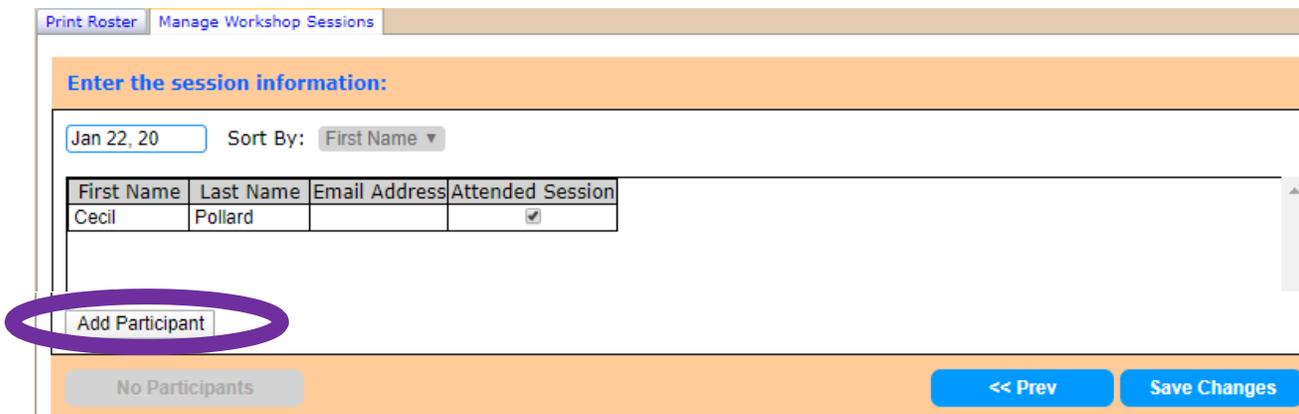
- We recommend that you do not use the **Add Participant** button, to add a new participant (even though the participant's name will be added to the workshop, they won't have any of their demographic information entered into the system. Instead, always add new participants at the **Participants** tab).

Thank you so much for all of the good work you are doing for so many people in your community. Do not hesitate to reach out to us at the Office of Health Services Research if you have any questions or hiccups with this software! The best way to reach us is by emailing wvhealthconnection@gmail.com.

Thanks and have a great day!