



## The Five Steps to Enlightenment: “I Mastered Connect” – a Simple Job Aid for Happy, Able Connect Users

### **Magic Step Number 1: Creating Terms Makes Sense**

Your student information is stored per term so if you have not created an active term, you cannot begin working with Connect. Once you have created a term, you can begin to add student information.

### **Magic Step Number 2: White space, right click!**

You can almost always be assured that when you see white space, you can right click on your mouse and the magic begins. No need to explain anymore, just right click and see.

### **Magic Step Number 3: Note card with a yellow flash = new entry.**

Every time you see one of these little note cards, you get the chance to add something new! Let's say you're entering data in the general student section and you want to add a local training agreement that is used in your work based program. Just click on the note card and you will be given the chance to create the new training agreement.

### **Magic Step Number 4: In order to create Training Plans, you must be in the Employment and Training Plan section**

One of the most repeated questions we hear from users is “where do I go to create a training plan?” There are two parts to the answer along with a footnote. First, you start in the **General Student** section. Second, you'll see the navigation title: **Employment and Training Plan** within the **General Student** section. If you click on it, you'll be able to directly create training plans from here. Now for the footnote: as logical as this sounds, because the thrust of Connect for many users is to create and apply training plans, people often forget that you can't jump from general information about a student to developing training plans. You have to first get your student a job. No job, no training, right? So, the key here is to ensure that you first have assigned an organization (ie, employer) to your student. From here, you can have fun with the training plans.

### **Magic Step Number 5: Check Print to File when you want to work with a MS Word or Excel file**

No matter which report you want to save and customize in MS Word or Excel, you have to check **Print to File**. Once you check this, you're able to save the report anywhere you want and customize till your heart's content.