FORUM RESEARCH

Co-operative
Education and
Work-Integrated
Learning Canada

CO-OPERATIVE EDUCATION AND WORK-INTEGRATED LEARNING CANADA

Portal Documentation

Ver. 1.2

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Forum Research Inc.

CONTENTS

DEFINITIONS

Portal – the Co-operative Education and Work-Integrated Learning Canada Portal:
https://cewil.uwaterloo.ca/

Left Hand-Side Navigation Pane – the left-most Portal navigation menu

Drop Down Menu – a type of menu that reveals multiple options when clicked

Field – a portion of the Portal page dedicated to a specific topic

LEGEND

- identifies an area of focus

CONTACT INFORMATION

If you require assistance with the Portal, please contact :

- Email: support@cewilcanada.ca
- Phone: 416-483-3311

ADDITIONAL RESOURCES

Video tutorials covering Portal functionality are available via YouTube:

- Log-In & Homepage
- User Administration
- Institutions
- Programs
- Sample Management
- Reporting

- [Full Video Tutorial](#)

LOG-IN

You need to complete this step in order to receive access to the Portal.

First-time log-in: setting up new password

You should have received an automated email prompting you to log in to the Portal. This email was sent from **support@cewilcanada.ca**. Sometimes, messages from this email address are filtered to a spam or junk folder of your email inbox. To avoid this, add **support@cewilcanada.ca** to your email contact list.

Step 1:

During your first-time log-in, enter the username and password that were provided to you in the email into the 'email and password' fields and click **Sign In**. Then create a personal password.


Step 2:

On the new page, enter your old password from Step 1. Then enter a new personal password into the assigned fields and click **Save**. Your new password must be between 6 and 20 characters with at least one upper case letter, one lower case letter, and one number.

USER ADMINISTRATION

The **User Administration** page allows you to manage the users who have access to the Portal.

Navigation: accessing the Admin page

On the left hand-side navigation pane, locate, and click on **User Administration**. This action directs you to the User List page.
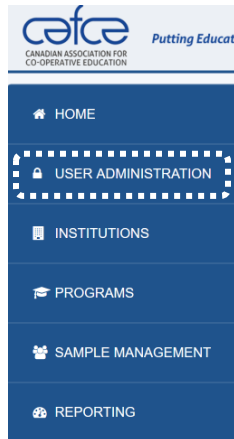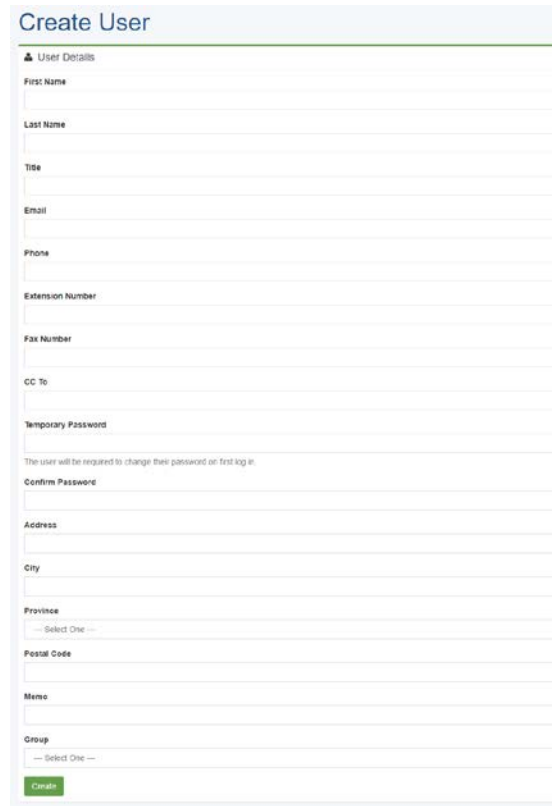

Adding New Users

To add a new user, click **Add New** on the **User Listing** page. This action directs you to the **Create User** page.
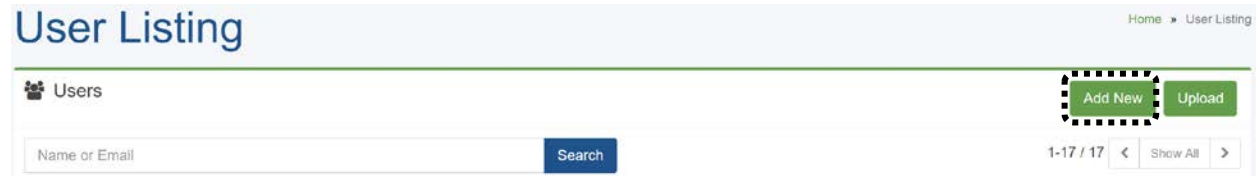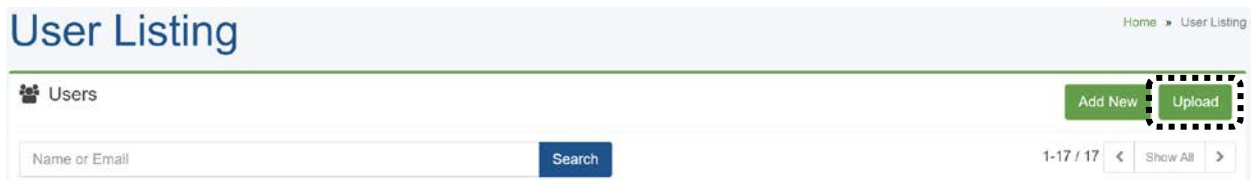
On the **Create User** page enter information into the specified fields. Please note that the new user will be required to change their password when they first log-in. When you have completed your entry, click **Create** to create a new user.


Uploading New Users

To upload a new user, click **Upload** on the **User Listing** page. This action directs you to the **Sample Upload** page.

Instructions for the **Sample Upload** page are provided in the **Sample Management** section of this document.
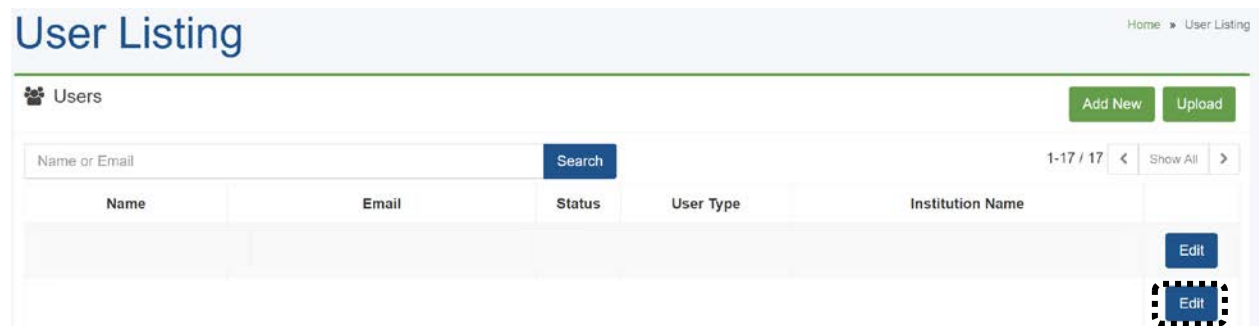
User Search

To search for an existing user, locate the search bar on the User Listing page, enter the name or email address of the user in question, then click **Search**.
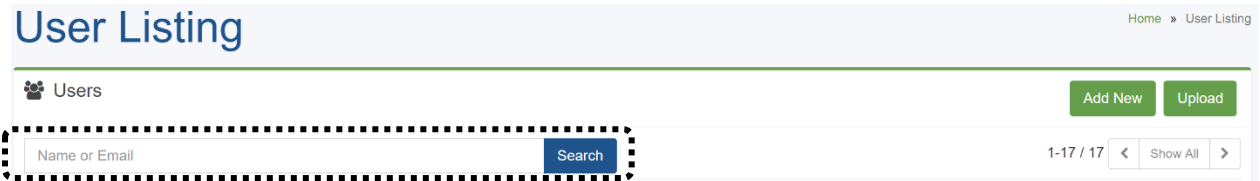
User Edit & User Password Reset

To edit characteristics of an existing user, locate the user on the User List page and click **Edit.** This action directs you to the **User Editor** page.

On the **User Editor** page, you can update user parameters, and send out a password reset email.

User Roles

The **User Editor** page has the following user roles:

- CEWIL Canada Admin – has access to all portal functions, including adding/editing all users, editing all institutions and programs, uploading all data, and viewing all reports for all institutions.
- Institution Admin – can add/edit users, add/edit programs, and upload data for the assigned institution only, and view all reports for all institutions.
- Institution User – can view all reports for all institutions.

Re-Assigning User Role

In an event where an Institution Admin role needs to be re-assigned from one individual to another, the suggested practice is to add a new user on the **User Listing** page.
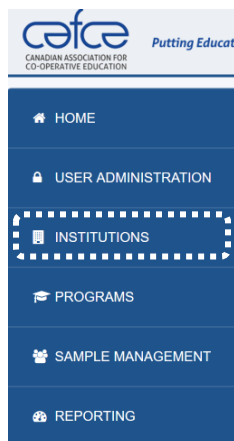
INSTITUTIONS

The **Institutions** page allows you to manage the institutions in the database.

Navigation: accessing the Institutions page

On the left hand-side navigation pane, locate, and click on **Institutions**. This action directs you to the **Institutions Listing** page.

Adding New Institutions

To add a new institution, click **Add New** on the **Institution Listing** page. This action directs you to the **Add Institution** page.
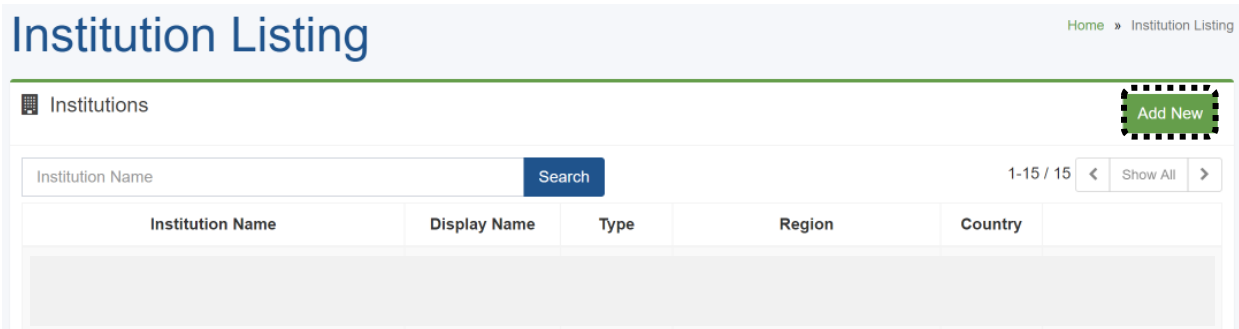

On the **Add Institution** page enter information into the specified fields. When you have completed your entry, click **Create** to create a new institution. Please note that institutions need to be created before data can be uploaded on the **Sample Management** page.
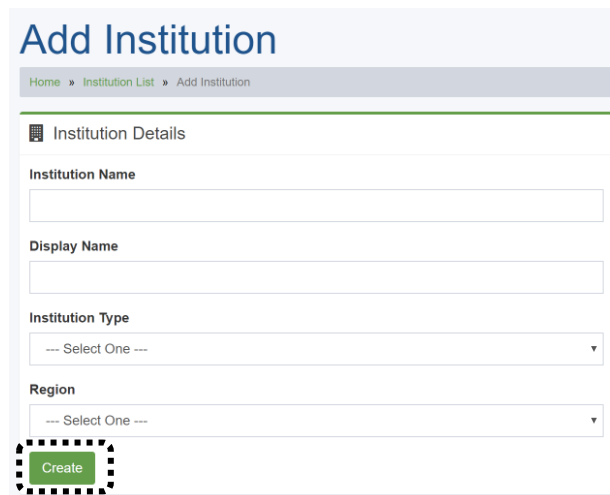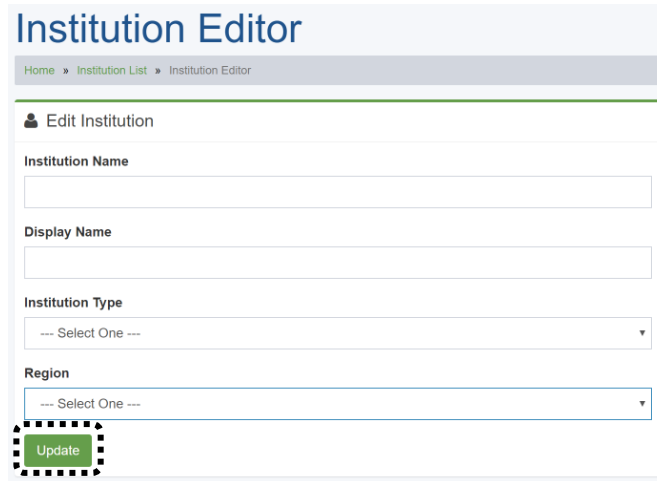

Institution Search

To search for an existing institution, locate the search bar on the Institution Listing page, enter the name of the institution in question, then click **Search**.
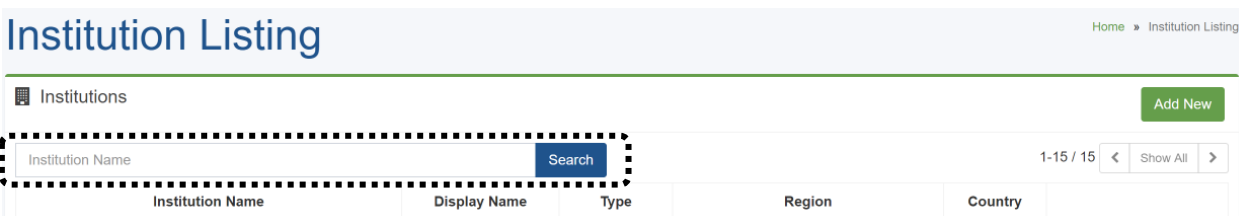
Institution Edit

To edit characteristics of an institution, locate the institution on the Institution Listing page and click **Edit.** This action directs you to the **Institution Editor** page. On the **Institution Editor** page, you can

update Institution parameters. Please note that you can only edit institution parameters prior to uploading data on the **Sample Management** page.


Institution Type Update

In an event when Institution Type of an institution changes, the recommended practice is to create a new institution on the **Institution Listing** page.

PROGRAMS

The **Programs** page allows you to manage the programs in the database.

Navigation: accessing the Programs page

On the left hand-side navigation pane, locate, and click on **Programs**. This action directs you to the Programs Listing page.
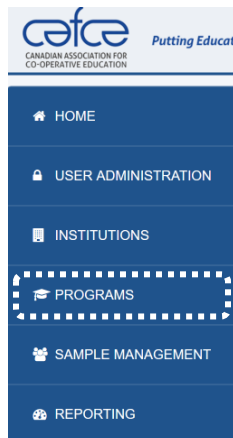
Adding New Programs

To add a new program, click **Add New** on the **Program Listing** page. This action directs you to the **Create Program** page.

On the **Create Program** page enter program name and select the corresponding institution from the drop down list. When you have completed your entry, click **Create** to create a new program. Please note that Programs need to be added for each institution before program data can be uploaded.

Program Search

To search for an existing program, locate the search bar on the Program Listing page, enter the name of the program in question, then click **Search**.

Program Edit

To edit characteristics of a program, locate the program on the Program Listing page and click **Edit.** This action directs you to the **Program Editor** page. On the **Program Editor** page, you can update program

parameters. Please note that you can only edit program parameters prior to uploading data on the **Sample Management** page

Program Enable / Disable

To enable or disable a program, locate the program on the Program Listing page and click **Enabled** or **Disabled.** Please note that only programs that don't have data can be disabled.
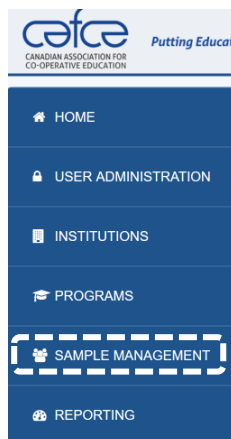

SAMPLE MANAGEMENT

The **Sample Management** page allows you to manage the sample for Program and Institution data.

Navigation: accessing the Sample Management page

On the left hand-side navigation pane, click on **Sample Management**. This action directs you to the View Sample page.

Sample Upload

To upload data sample, click **Upload Data** on the View Sample page. This action directs you to the **Sample Upload** page.

Quick Tips for Data upload

- Institution Data and Program Data files must be uploaded one at a time
- The exact format outlined in the downloadable templates must be followed for successful data upload
- Only the discipline names outlined in the Discipline Name List document are accepted for sample upload
- Only .xls, .xlsx, .csv files are accepted for sample upload

Follow the steps below to upload data sample:

Step 1: On the **Sample Upload** page, download the **Template for Institution Data** and **Template for Program Data** documents. These documents outline the exact formatting that you need to follow for sample upload. Please note that only the discipline names outlined in the **Discipline Name List** document are accepted by the database.

Important Note: Appendix A "Data Dictionary" attached to the end of this document provides further detail on the mandatory fields and types of input data required.
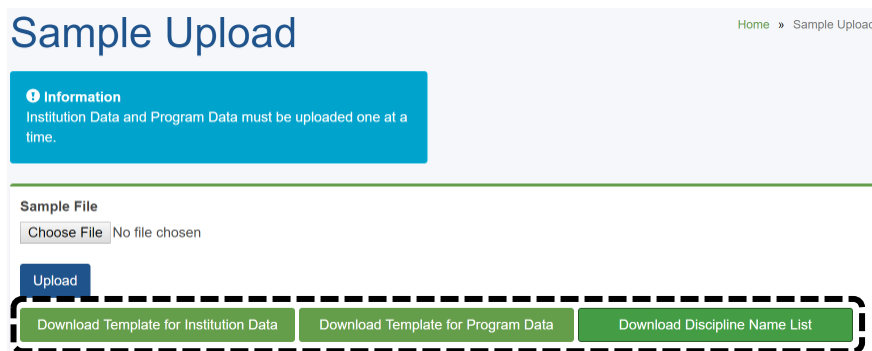
Step 2: On the **Sample Upload** page, click **Choose File** to locate the sample file on your computer. When you locate the file, click **Open**. Then, on the **Sample Upload** page, click **Upload.**

Please note that only .xls, .xlsx, .csv files are accepted for sample upload.
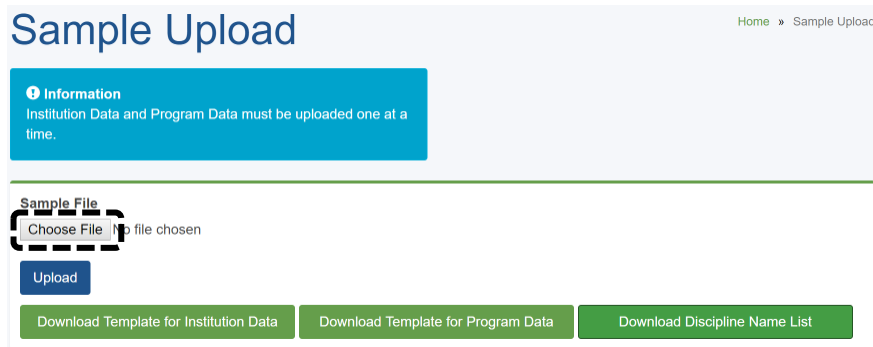
Step 3: After successfully uploading the file, a summary window will appear. Review the information, and click **Confirm** to finalize sample upload. Click **Cancel** if the displayed information is incorrect. Please note that closing the window cancels the upload.
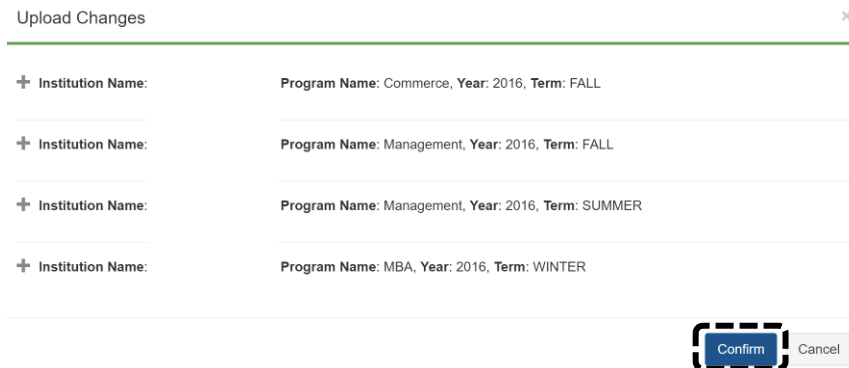
Sample Upload Error
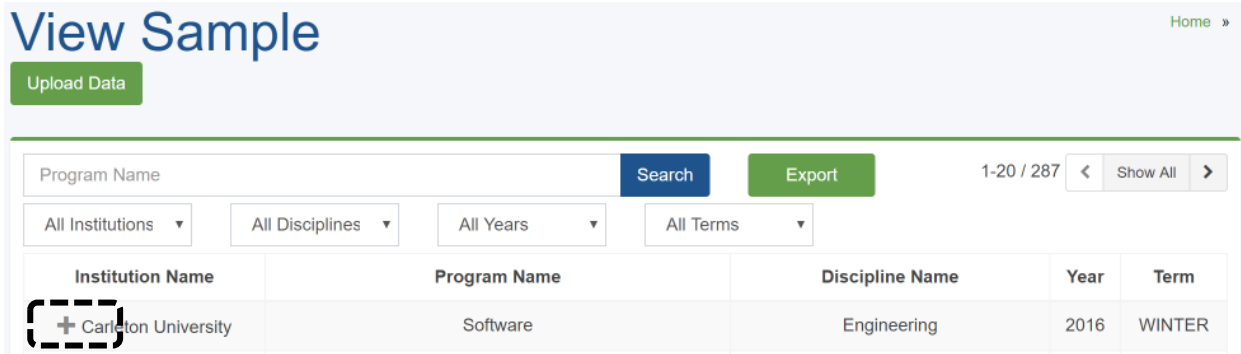
If your sample file contains errors, you will receive an **Error** message with a unique reference code and error description. If you need to contact Forum Research for any reason relating to this file, please include the provided reference code. The reference code helps us to serve you better. If you do not have the reference code, we can still help you address your issue.

Please note that only .xls, .xlsx, .csv files are accepted for sample upload.
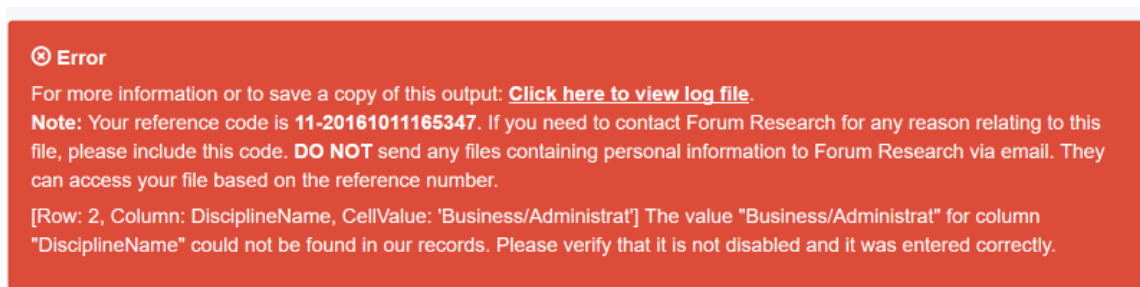
Sample View

On the **View Sample** page you can view full program and institution information by clicking the expanded view field.
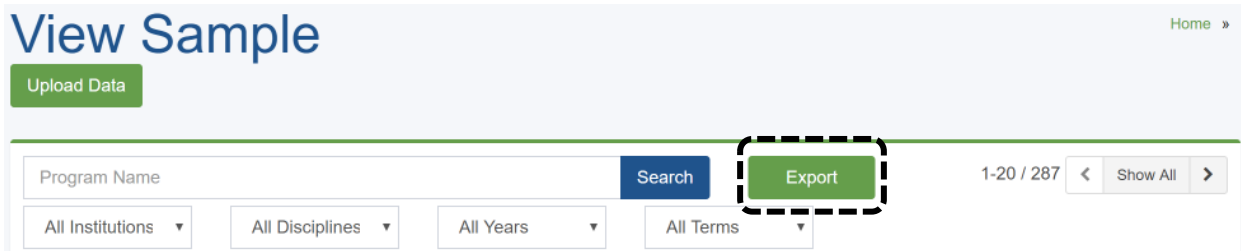

Sample Search

To search for specific data, locate the search bar on the **View Sample** page, enter the name of the program in question, select the desired search parameters (institution, discipline, year, semester), then click **Search**.

Sample Export

To export data, follow the steps outline in the **Sample Search** section above, then click **Export**. This action will download the specified data to your computer.

REPORTING

The **Reporting** page allows you to view and export program data.

Navigation: accessing the Reporting page

On the left hand-side navigation pane, click on **Reporting**. This action directs you to the **Report List** page.
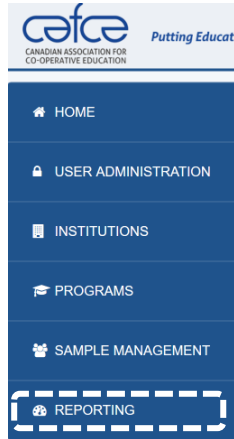

Types of Reports and Access

Eight reports are available on the Report List page:

- Work Term Totals by Year/Term
- Year/Term Comparison of Work Term Totals
- Work Term Totals by Employer Type
- Work Term Totals by Work Term Location
- Work Term Totals by Occupational Discipline
- Co-op Salary Summary
- Co-op Fee Summary
- Work Terms by Institution

To access the report in question, click on the arrow button.
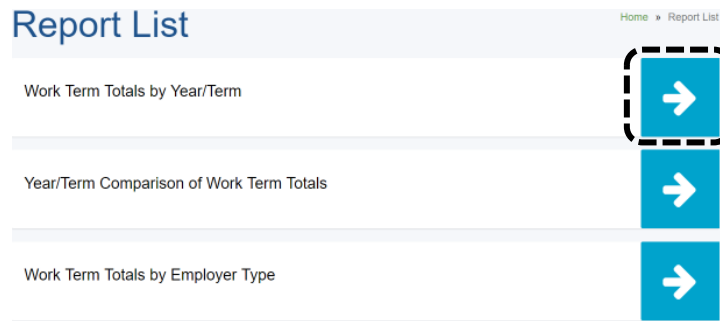
Configuring the Reports

Each report page has a Search Parameters section. This section allows you to select the specific parameters of the report. After selecting the desired parameters, click **Submit** to generate the report.

To export the results, click **Export.**