<u>Creating a Guest Supervisor ID and allowing access to an Intern Report</u>   March 15, 2017
Documentation created by Sharon Sankar, P.Eng., P.E. Director of Admissions, Engineers
Geoscientists Manitoba

*The following instructions are to be used as a guideline and are subject to revision without
notice. We will post at [www.apegm.mb.ca](http://www.apegm.mb.ca) and revise as necessary. Note that the name
Association of Engineers and Geoscientists of Manitoba (APEGM) has now been replaced with
Engineers Geoscientists Manitoba. 'Engineer/Geoscientist in Training' has now been replaced
with 'Engineering Intern/Geoscience Intern'. The acronym 'MIT' has been replaced with
'Intern', but EIT and GIT continue as acronyms. The screenshots, however, may continue to use
some of the old terminology.*

The following document applies to Interns who have supervisors who do not currently have an
Association number . This document should be reviewed in conjunction with: <u>Using the Online
System for Interns</u>

> **IMPORTANT: PLEASE READ THE ENTIRE DOCUMENT AND RETAIN FOR YOUR
> RECORDS.**

> **IMPORTANT:** When you have a supervisor who does NOT have an ID on the database, you
> must assist him/her in creating an ID in order to allow him or her to view and provide
> commentary on your report(s). It is important to note the following:

- Anyone who is or has been a member, an Intern, an assessment applicant or a previous
  Guest supervisor will already have an ID. You will not have to create a new ID for them.
  Ask them to give you the ID number.

- If the person is not certain whether or not he or she has an ID, then contact the
  Association office – either contact reception at [reception@apegm.mb.ca](mailto:reception@apegm.mb.ca)  or Sharon at
  [ssankar@apegm.mb.ca](mailto:ssankar@apegm.mb.ca) and we will verify this. **We want to avoid having the same
  person with multiple IDs!**

- If that person does not have an ID number, they can set up a Guest ID which can be used
  for subsequent viewing of reports by yourself or others. There IS validation through the
  system  to reduce the possibility of multiple IDs, however, since many people have
  similar names or they go by different names depending on the country of origin, it's
  important to try to remember whether or not an id has already been created.

- **If you have multiple guest invitations open <u>at the same time,</u> you must create
  different tokens for each guest. This will be explained more clearly in the
  documentation that follows.**

<u>Note: The following example assumes that Obie Wan Knobe is the Intern and Hans Solo is the
unregistered supervisor who is going to be granted Guest privileges. In the Alternate Method</u>

further on, Obie Wan Knobe continues to be the Intern and C3 Pio is the new unregistered supervisor.

Now, let's get started, shall we…..


Intern's Steps for creating the Guest Supervisor ID:

1.  Log in and go to your Home Page:
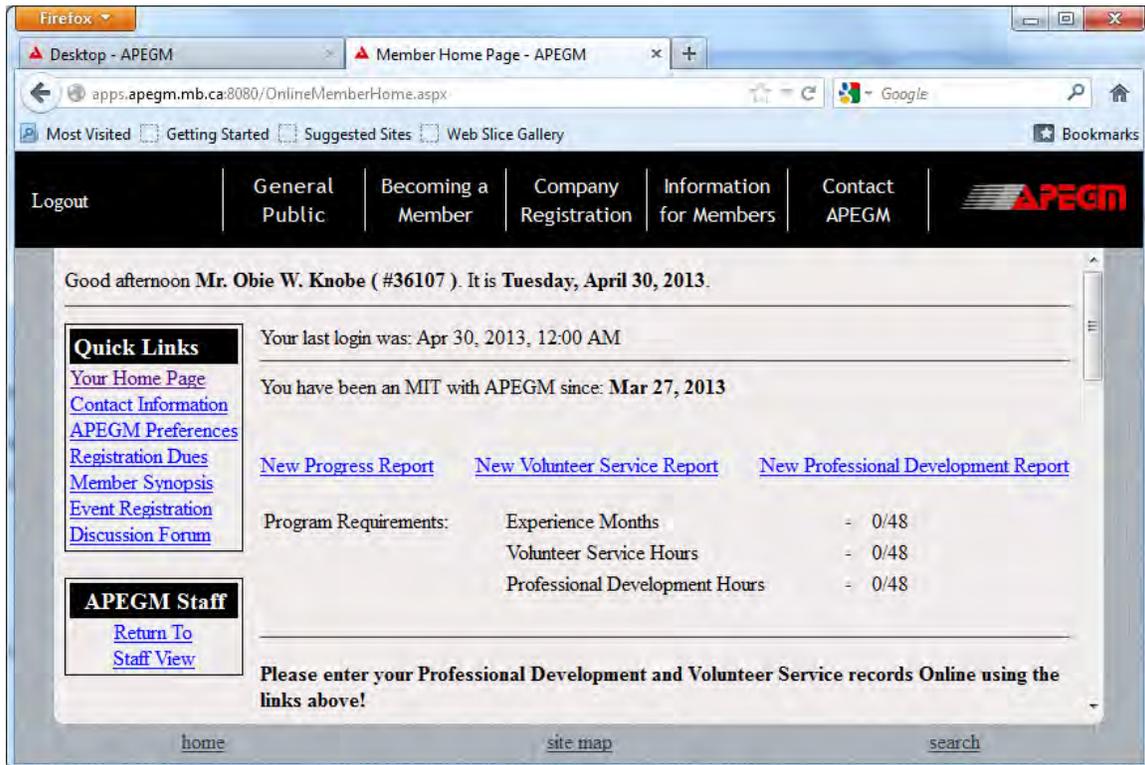


Screen 1 – Intern Home Page


2.  Click on New Progress Report link, to go to:
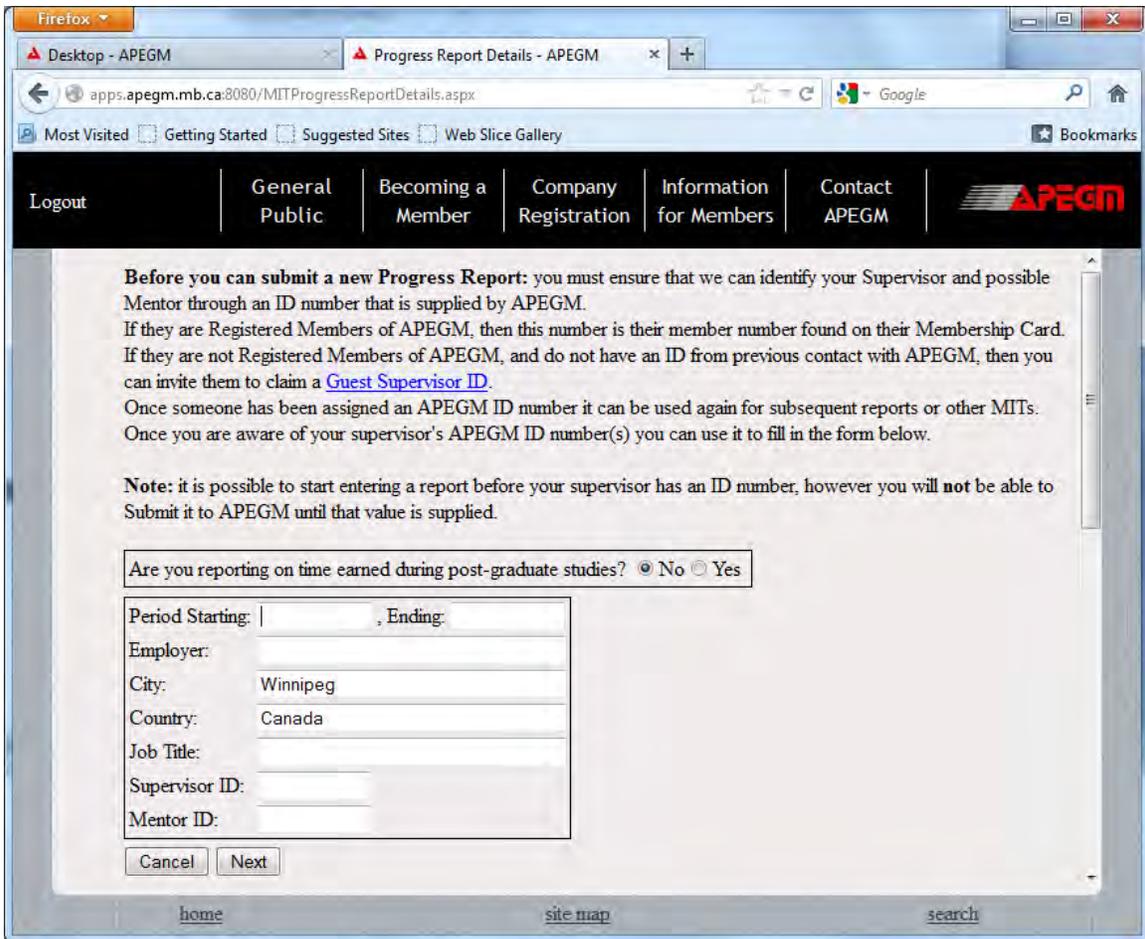
Screen 2 – Intern Report Creation Page

3. Click on <u>Guest Supervisor ID</u>, to go to:
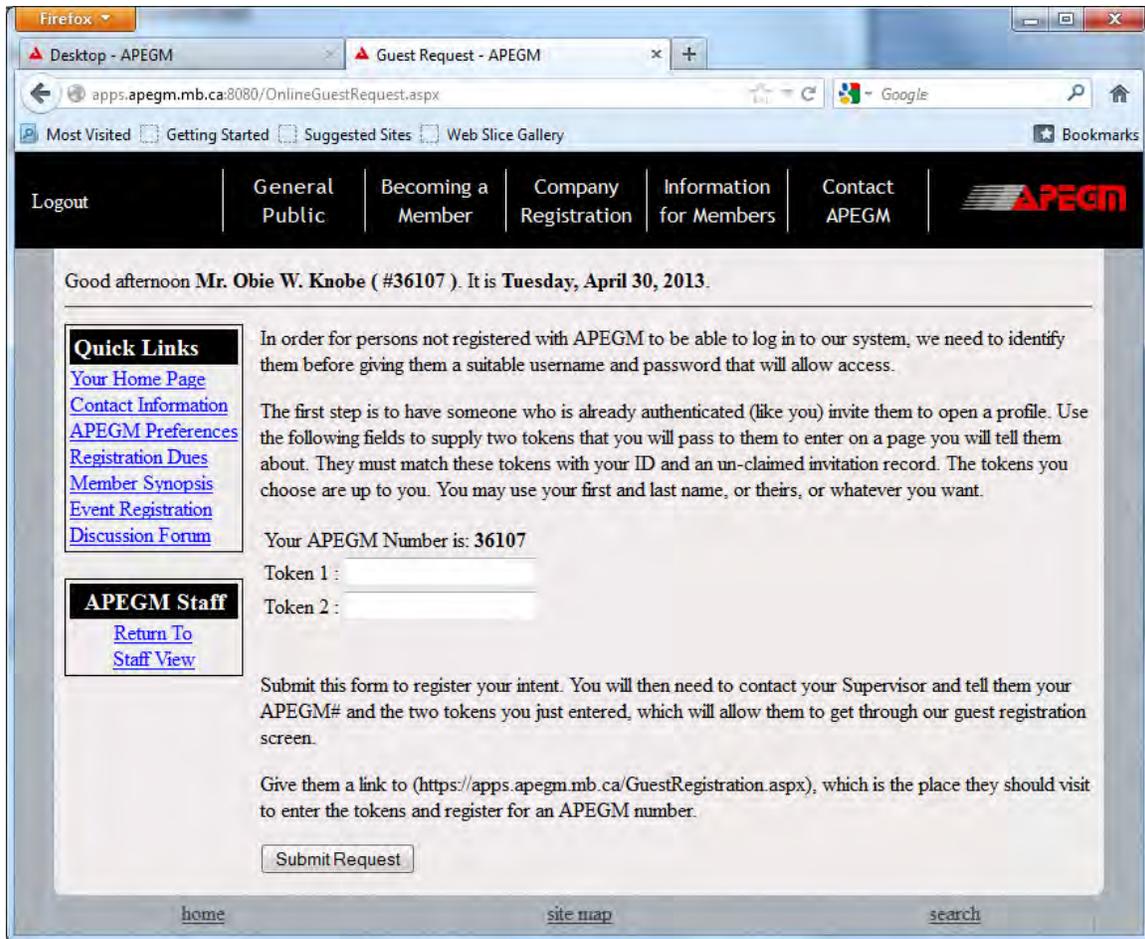
Screen 3 – Intern's Guest Supervisor Token Creation Page

3. Type in two Tokens – Token 1 and Token 2 – of your choosing. REMEMBER your 'APEGM' number (now called Engineers Geoscientists Manitoba number) and your two tokens.
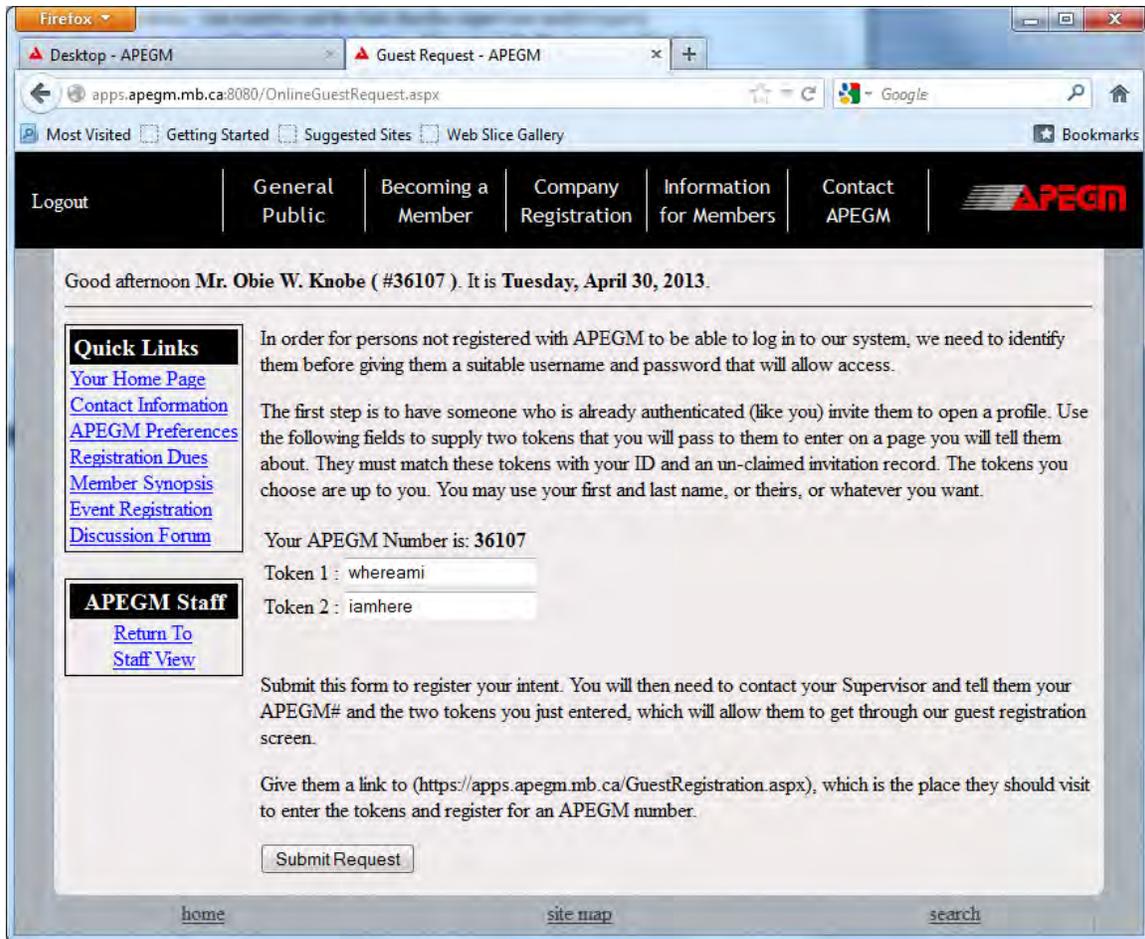
Screen 4 – Creating the Tokens for the Guest Supervisor

4. Memorize the tokens, your number and the link that the supervisor needs to go to: https://apps.apegm.mb.ca/GuestRegistration.aspx . (You can write this down and keep in a safe place).

5. Click **Submit Request** button.
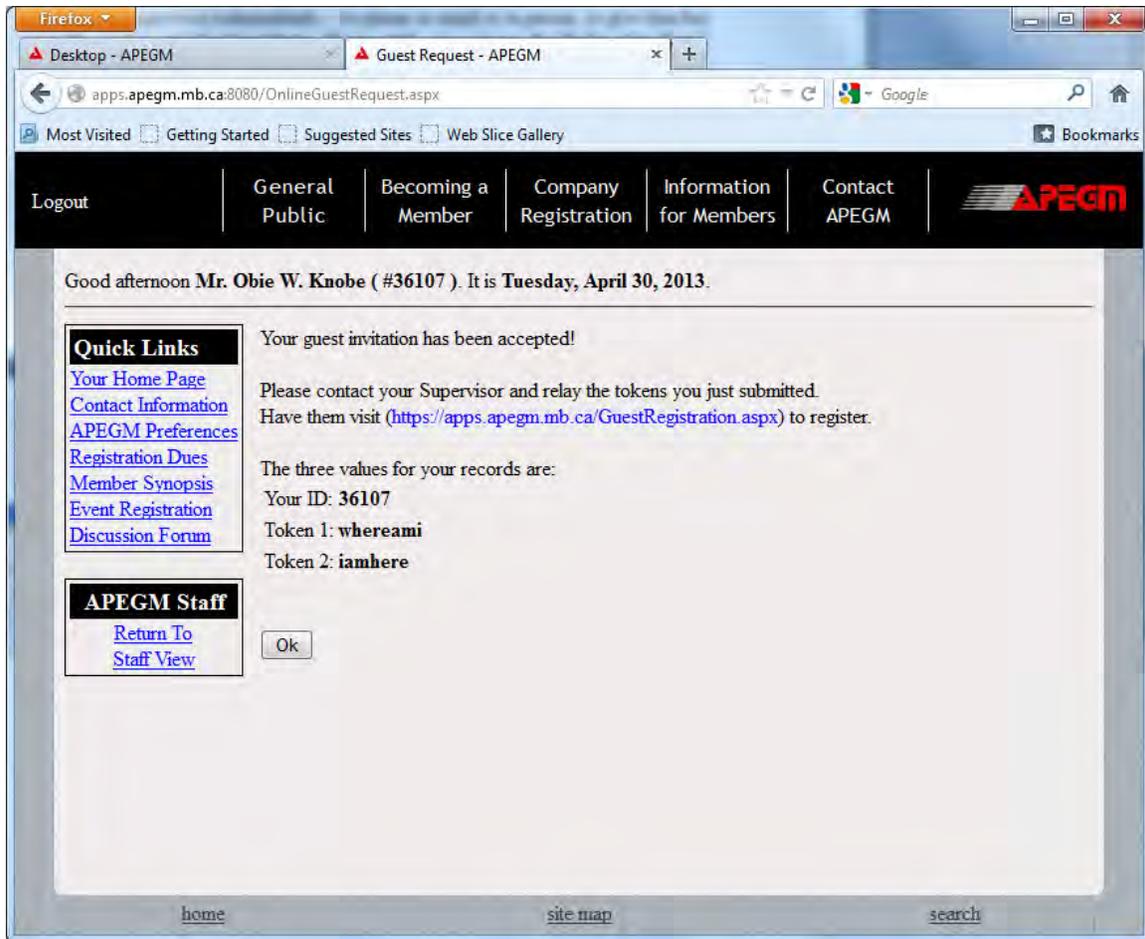
Screen 5 – Confirmation of the Tokens which YOU will SEND INDEPENDENTLY to the Guest Supervisor

6. Contact your supervisor independently – by phone or email or in person, to give him/her your ID number and the two tokens as shown above. Print screen the page to remember this if you wish.

NOTE: the confirmation above just means that the tokens are set up and ready to go ONCE the supervisor logs in. It is up to you to contact him or her to let them know the information and that it's been set up!

7. Click Ok, and then YOUR part is done for now, EXCEPT for the fact that it is up to YOU to follow up with your supervisor and make sure that he/she logs in. Association staff will not contact them, it is up to you to do so.

8.  When ready, the supervisor will go to: the GuestRegistration page indicated above, and will see a screen like the following:
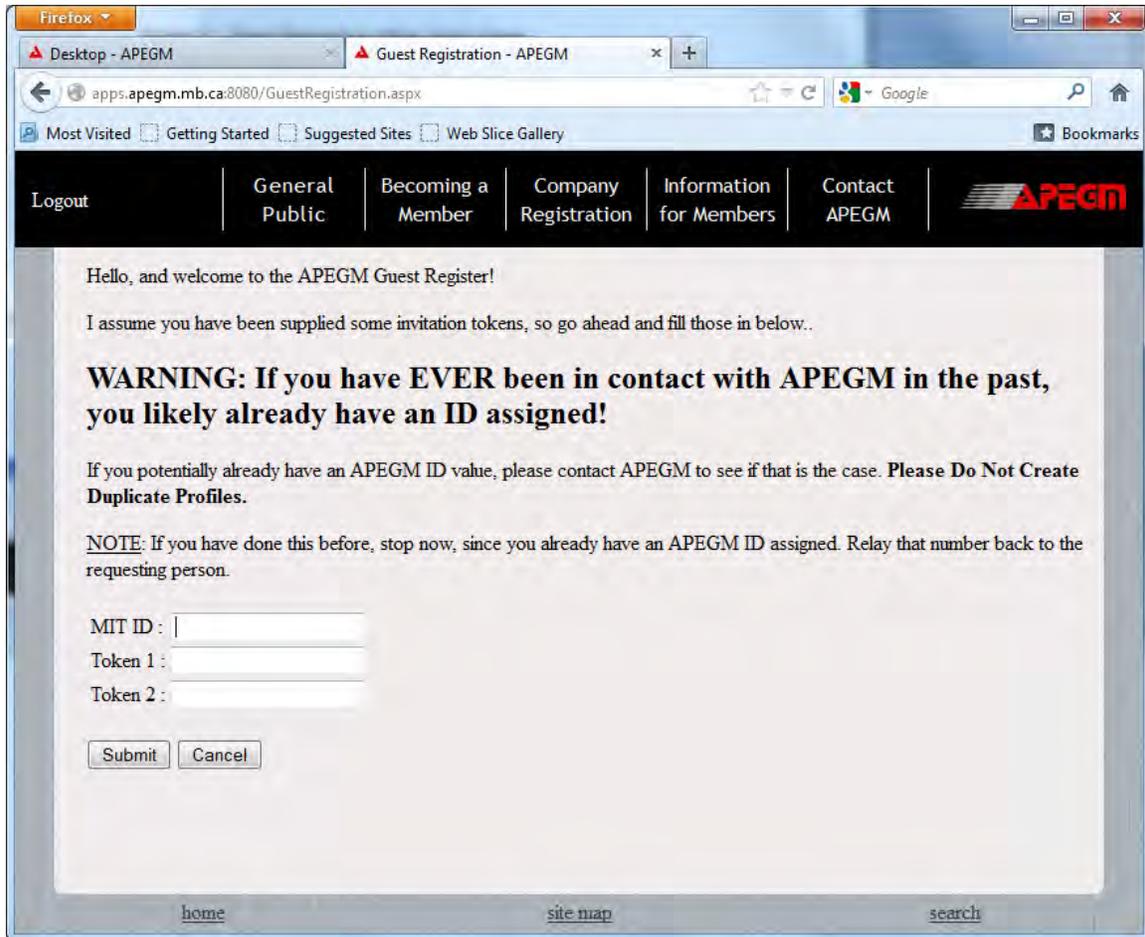


Screen 6 – Guest Supervisor token input screen

9.  The guest supervisor will then type in the ID and the two tokens which had been given independently to him/her by the Intern. Note that if he already has an ID, he should NOT complete this screen, but should instead contact the Intern to tell them his ID number.
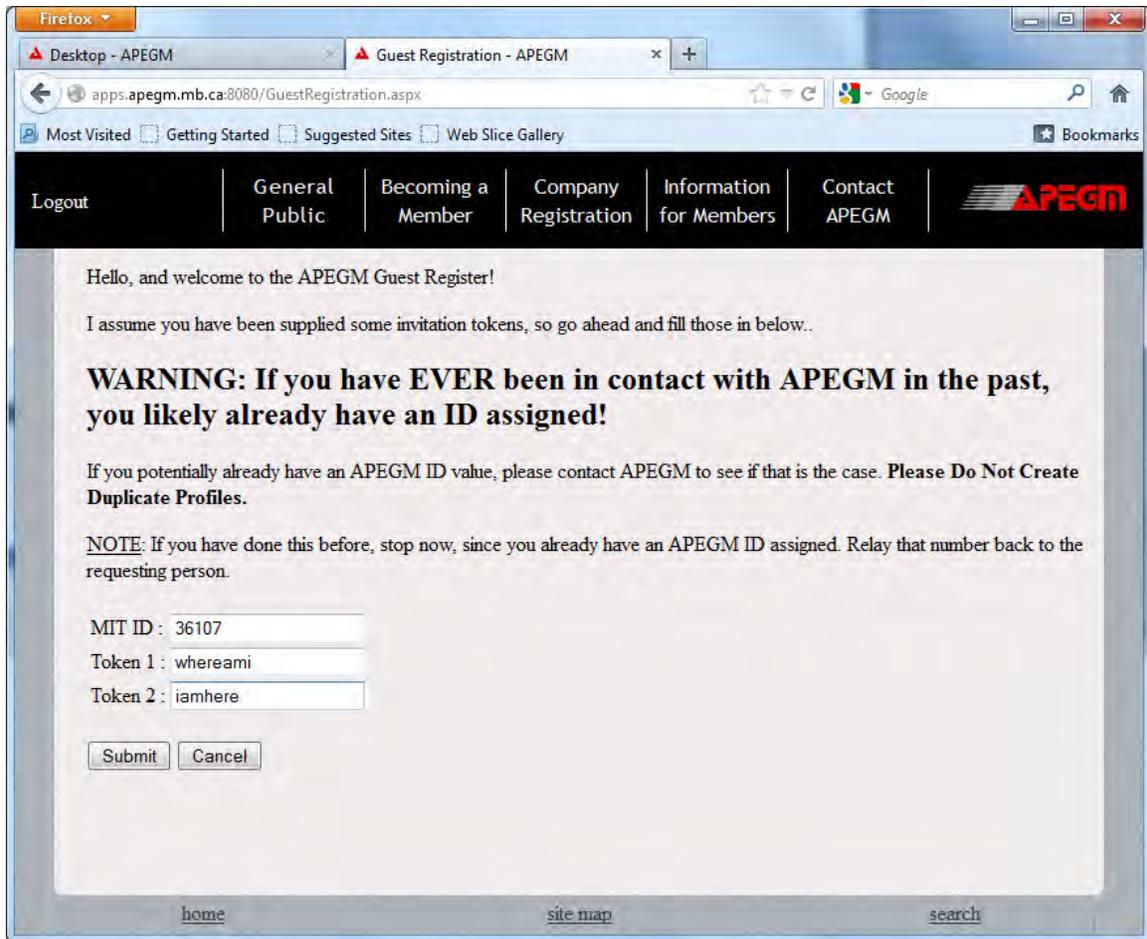
Screen 7 – Guest supervisor inputs the tokens and ID given to him/her by the Intern

10. He should then click Submit to get the following screen:
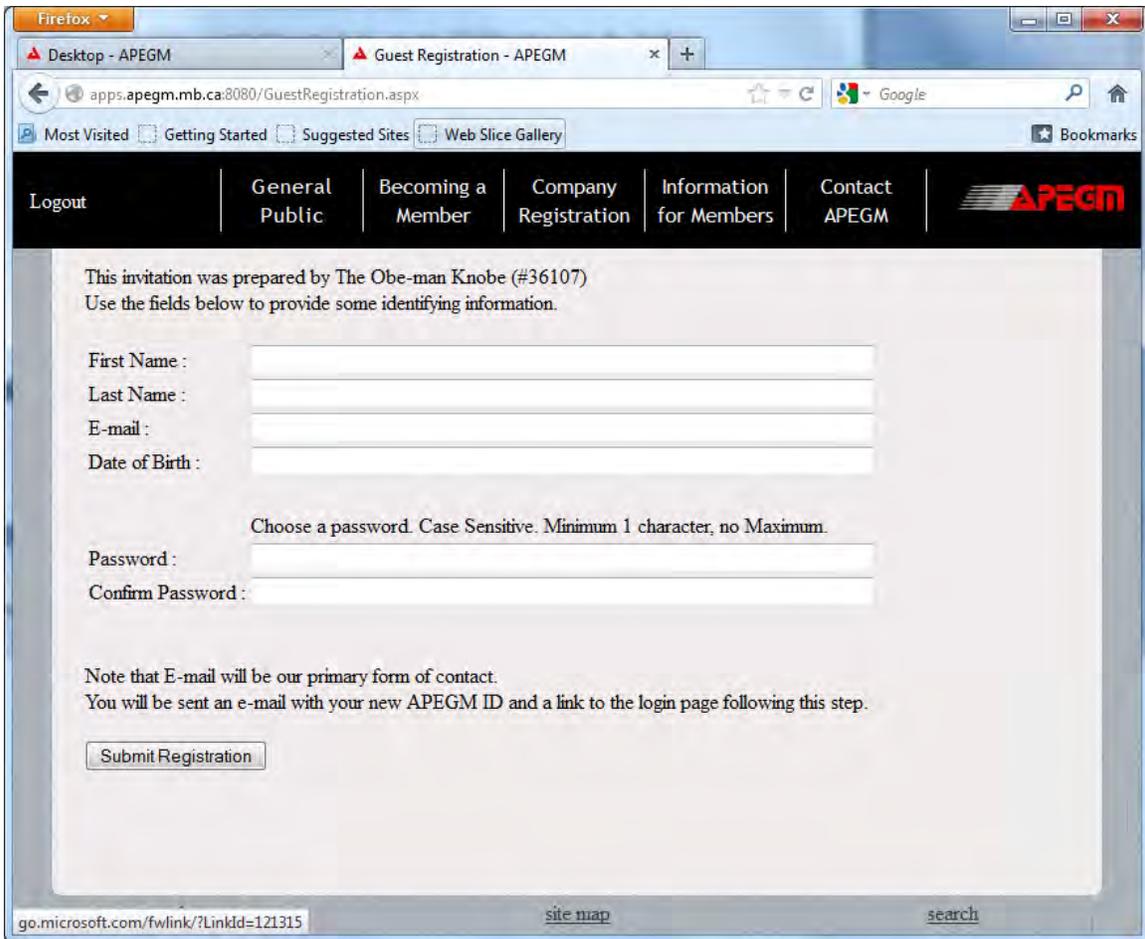
Screen 8 – Guest supervisor must complete the fields so that the Association can allow him/her access to the online system

11. As shown above, the Guest supervisor is required to put a basic amount of information into the database, in order that we may confirm his/her identity. For example:
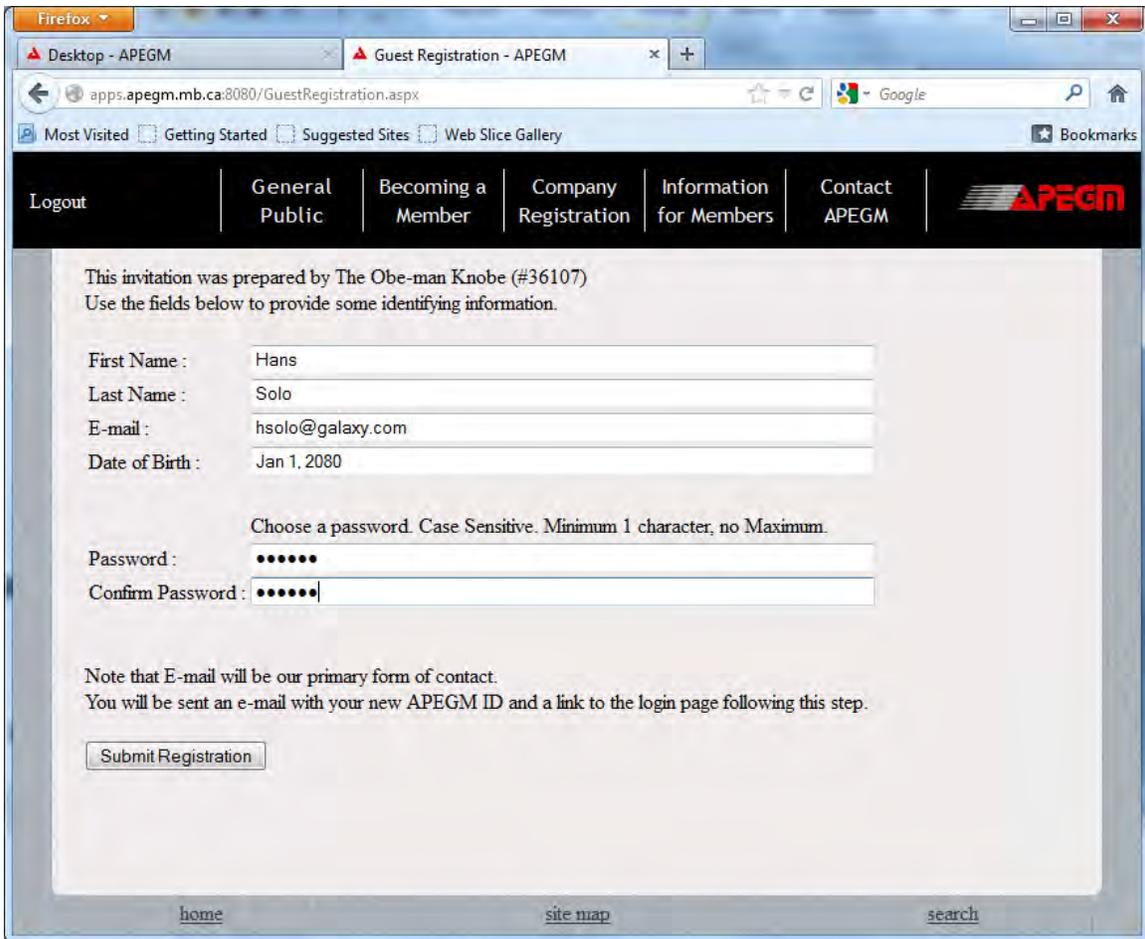
Screen 9 – Sample input from Guest supervisor

12. Verify that this is correct, then click the **Submit Registration** button. Remember your password and remember that it is CaSE-SPECIFIC.
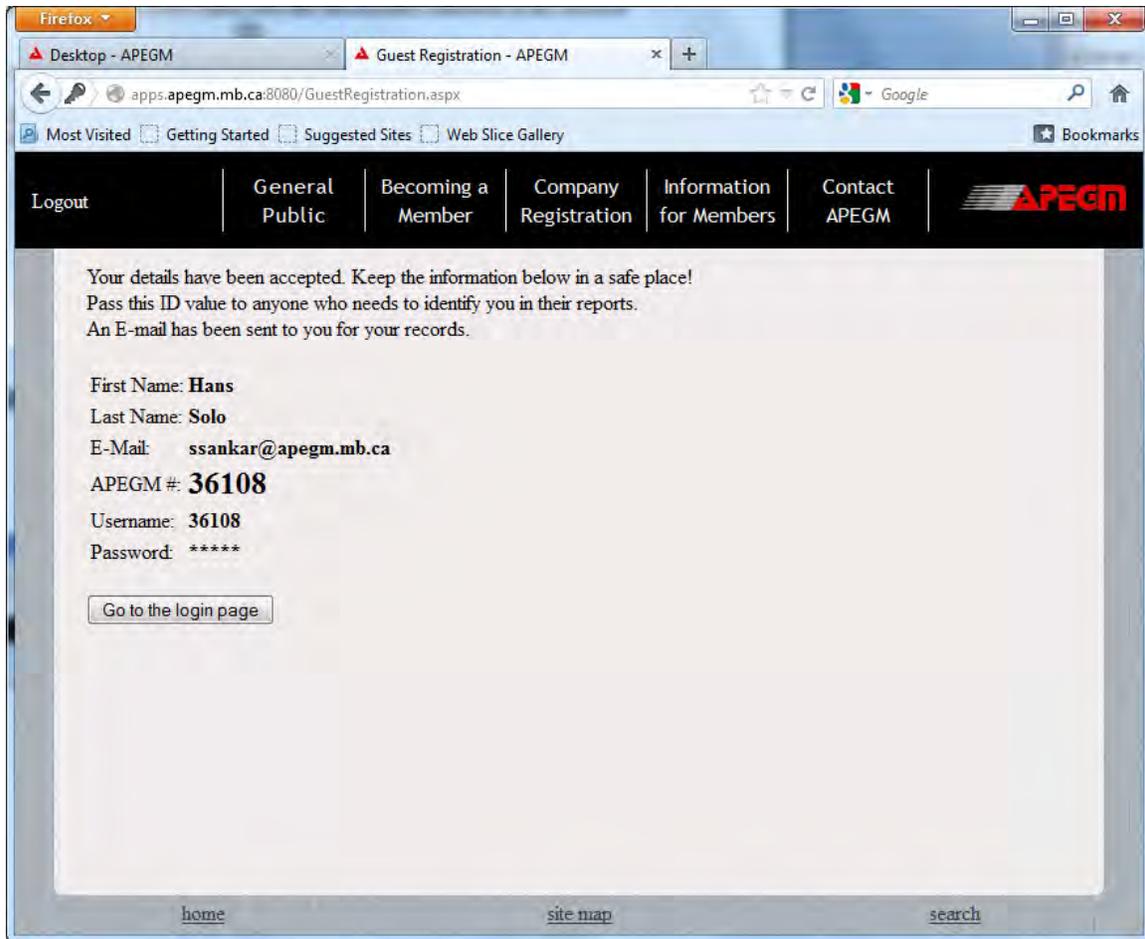
Screen 10 – Confirmation that the Guest supervisor has successfully registered at the Association site.
(For those of you with sharp eyes ----note that the email should be hsolo@galaxy.com NOT ssankar@apegm.mb.ca … …., this is correct, but the above IS a demo…)

13. For your records, it is advised that you print this screen and keep it in a safe place.

14. Either Close the screen or select **Go to the Login page**. Type in your ID and your password, as shown in the following screenshot.
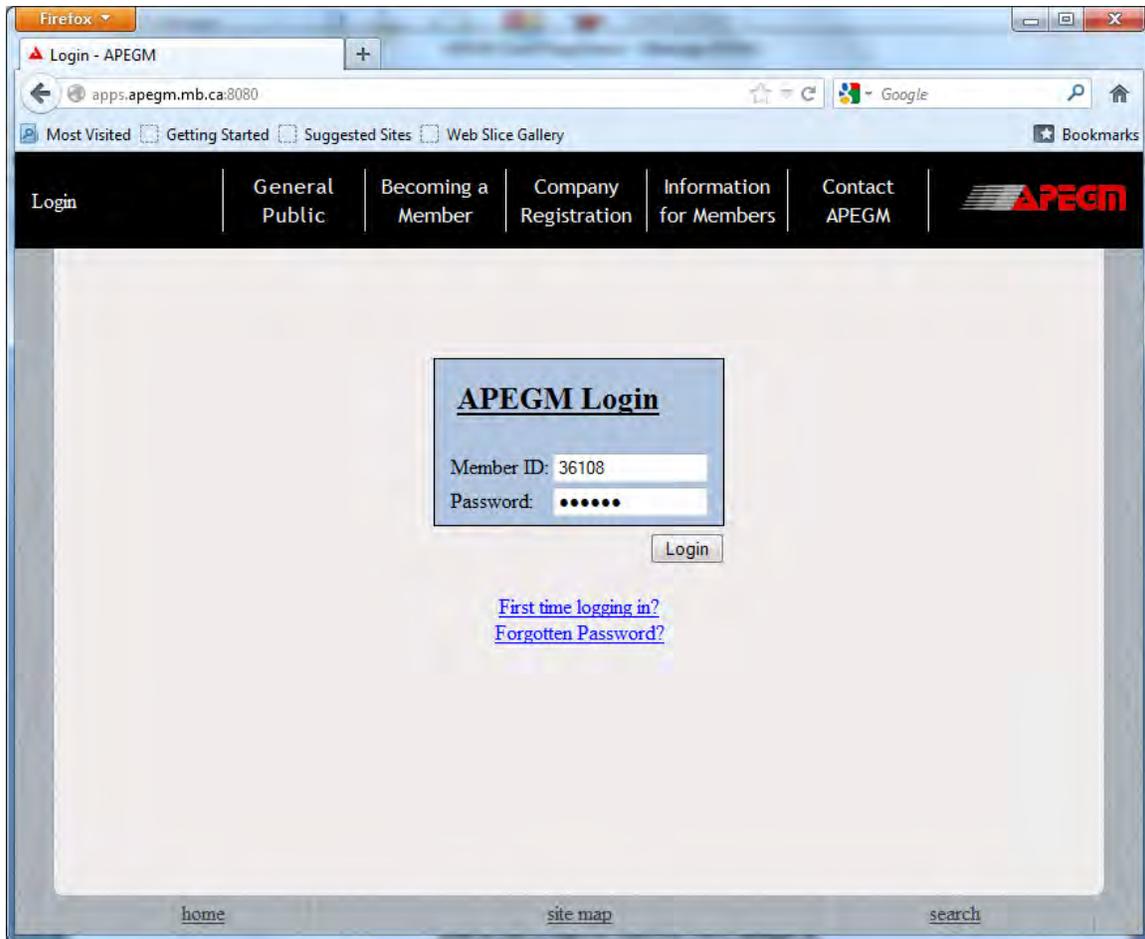
Screen 11 – Guest supervisor logs in with his/her 'Member' ID plus newly created password

15. When you log in you will be able to see your Home Page, and you will be able to input additional Contact Information if desired.

**16. Contact the Intern to give him/her the ID number which he/she will put in the report details. Once the Intern has input this number AND submitted the report, it will become viewable by you, the guest supervisor, at the supervisor Home Page. You, the supervisor, will NOT be able to see the Intern's report(s) until the Intern actually submits it/them.**
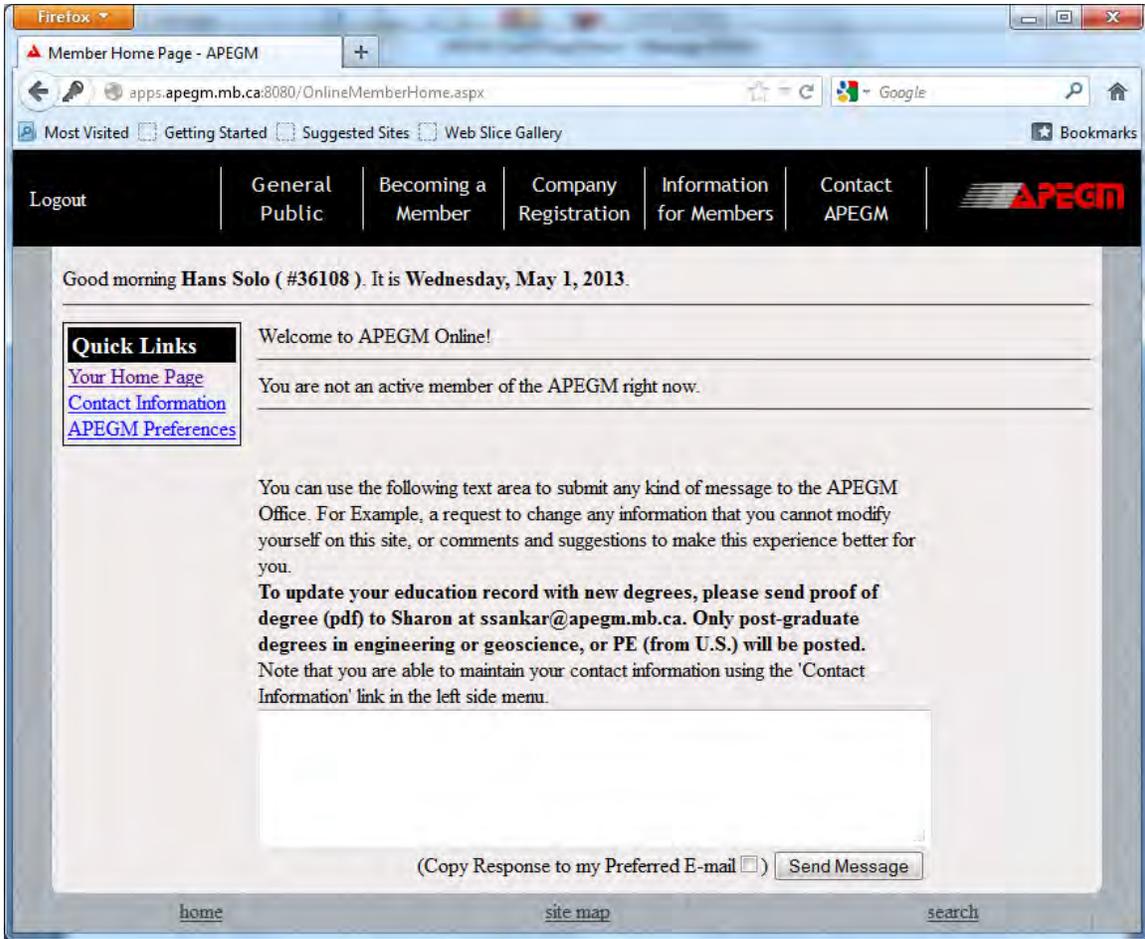
Screen 12 – Typical Guest supervisor Home page

Intern Input of Guest ID into Intern's Progress Report Details:

17. The Intern will input the Guest ID into the Report details by first going to their own home screen:
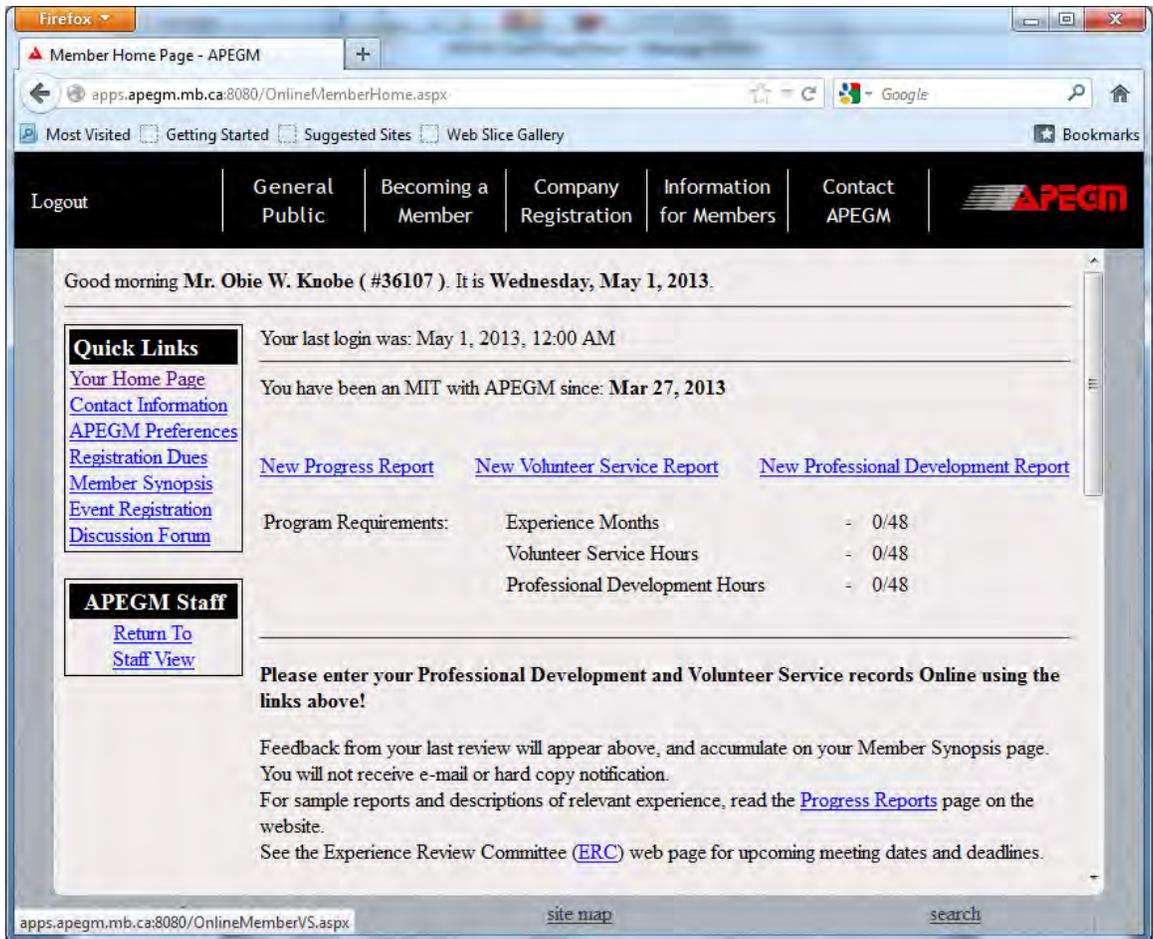
Screen 13 – Intern's Home Page

The MIT should click on New Progress Report (or alternatively, if he or she has reports already there, but not submitted, he or she can access the member details screen from the progress report itself):

Before you can submit a new Progress Report: you must ensure that we can identify your Supervisor and possible Mentor through an ID number that is supplied by APEGM.
If they are Registered Members of APEGM, then this number is their member number found on their Membership Card.
If they are not Registered Members of APEGM, and do not have an ID from previous contact with APEGM, then you can invite them to claim a Guest Supervisor ID.
Once someone has been assigned an APEGM ID number it can be used again for subsequent reports or other MITs.
Once you are aware of your supervisor's APEGM ID number(s) you can use it to fill in the form below.

Note: it is possible to start entering a report before your supervisor has an ID number, however you will not be able to Submit it to APEGM until that value is supplied.

Are you reporting on time earned during post-graduate studies? ● No ○ Yes

Period Starting: Jan 1, 2013 , Ending: Jun 1, 2013
Employer: Space Age Industries
City: Nebula Moon
Country: Planet Nebula
Job Title: Assistant Aeronautical EIT
Supervisor ID: 36108
Mentor ID:

Cancel    Next

Screen 14 – Intern can add the guest Supervisor ID (in this case, 36108) to the report. This gives the Guest supervisor the ability to review the report *once the report is submitted of course.*

Click **Next** button to create the new report. (If the report is one that has already been started, the buttons will say **Exit** and **Save**  rather than **Cancel** and **Next**). Clicking **Next**, if this is the first time you are creating the report will give:

**Before you can submit a new Progress Report:** you must ensure that we can identify your Supervisor and possible Mentor through an ID number that is supplied by APEGM.

If they are Registered Members of APEGM, then this number is their member number found on their Membership Card.

If they are not Registered Members of APEGM, and do not have an ID from previous contact with APEGM, then you can invite them to claim a Guest Supervisor ID.

Once someone has been assigned an APEGM ID number it can be used again for subsequent reports or other MITs.

Once you are aware of your supervisor's APEGM ID number(s) you can use it to fill in the form below.

**Note:** it is possible to start entering a report before your supervisor has an ID number, however you will **not** be able to Submit it to APEGM until that value is supplied.

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| | |
|---|---|
| MIT: | Mr. The Obe-man Knobe , Current Employment(Whatever, Self Employed) |
| Period: | Jan 1, 2013 - Jun 1, 2013 (5 months) |
| Employer: | Space Age Industries, Nebula Moon, Planet Nebula |
| Job Title: | Assistant Aeronautical EIT |
| Supervisor: | Hans Solo |

Note: Make sure these fields are accurate before you create the report. We are not responsible if you give it to someone else..

[Cancel] [Back] [Create Report]

Screen 15: Confirmation of Information about the Guest Supervisor

The Intern should verify that this is the correct supervisor AND the correct report you want them to review. The Association is NOT responsible if this report is routed to a different person. If this is correct, the Intern should then select the **Create Report** button and the report will come up:
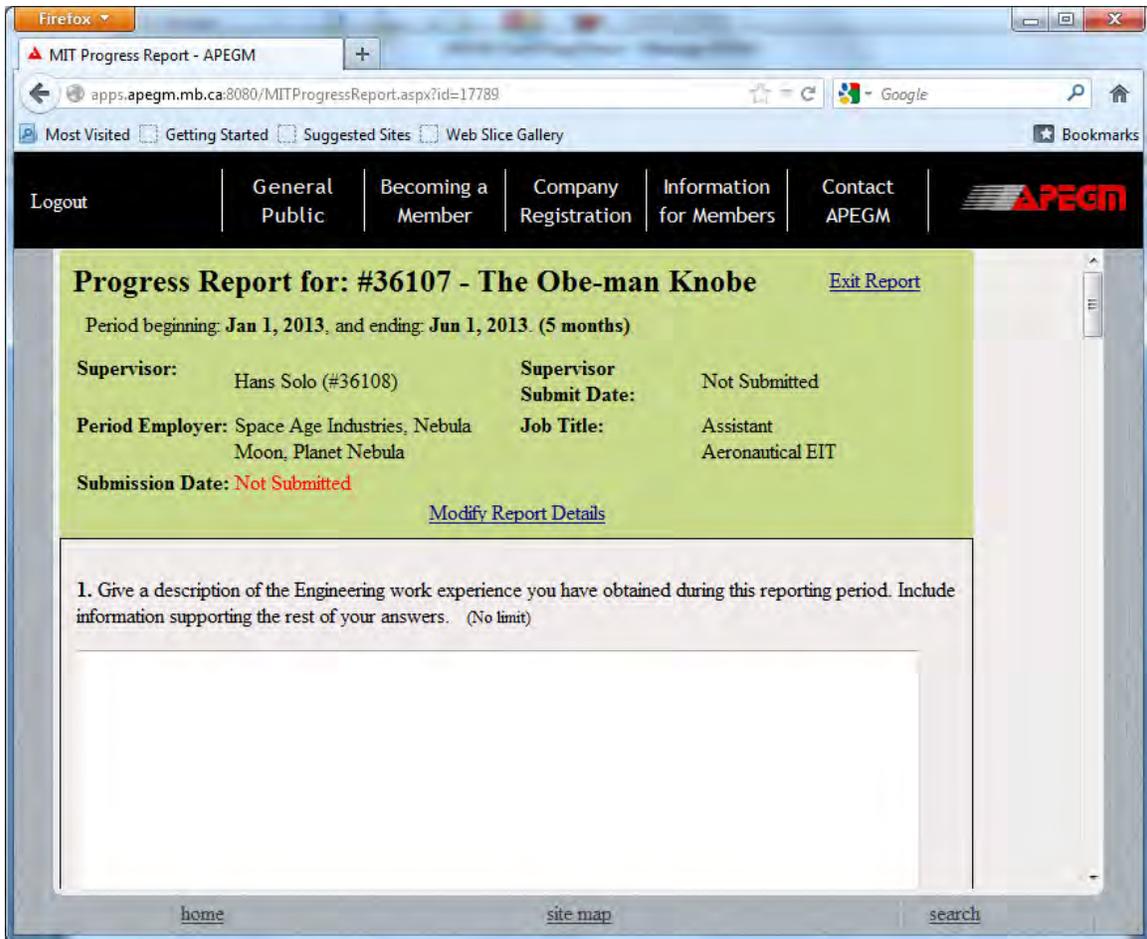
Screen 16– Intern report view

Scrolling to the end of the report for the purposes of the demonstration:

Screen 17 – Scrolling to the end of the Progress Report

Once satisfied with your report, you will click the Submit Report button, and the act of submitting will allow the (guest) supervisor to be able to view and comment on it *(once he/she logs in)*. You will then be returned to your Home Page.
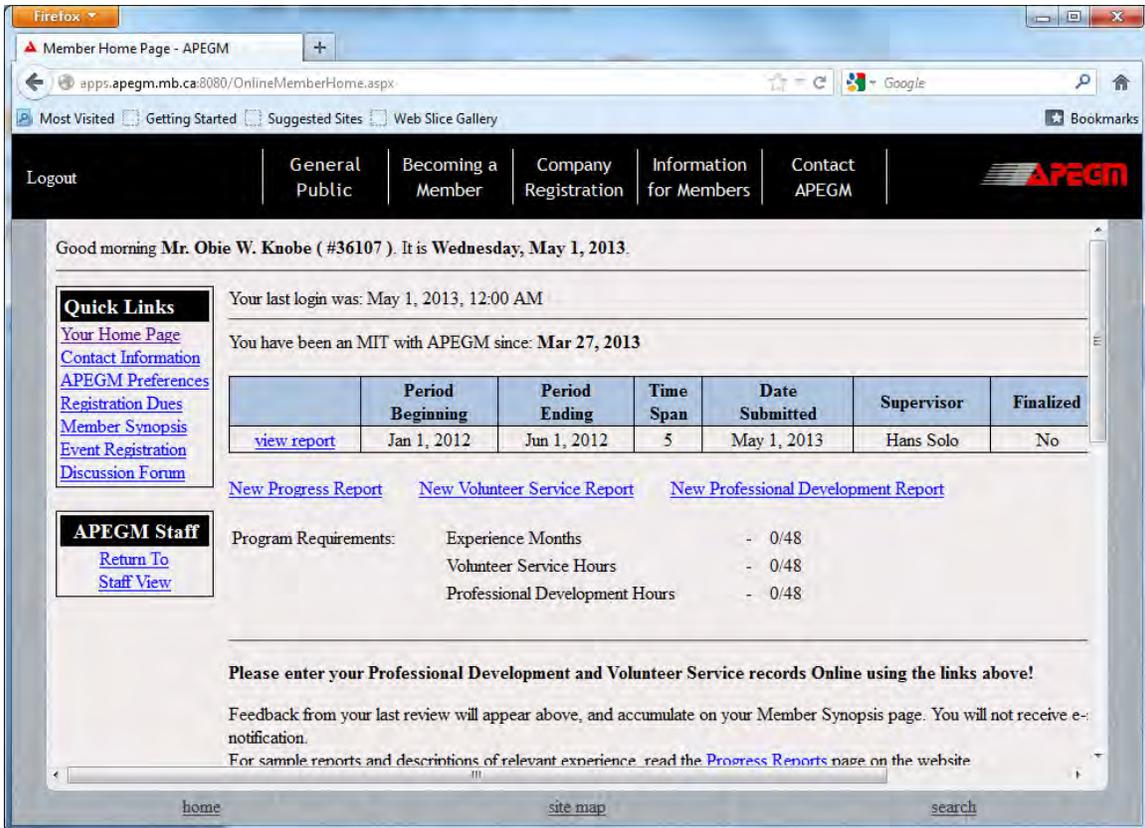
Screen 18 – Back at the Intern Home Page – (Note that the Supervisor Name – Hans Solo  -now appears.)

As a courtesy, an email will be sent to the Guest supervisor asking them to log in, but YOU, the Intern, MUST follow up independently

Note: The supervisor name now appears, and that means the supervisor will be able to see it when he/she logs in. If you want to be able to tell whether your supervisor has submitted his/her portion of the report, run your mouse over top of the supervisor name in the column 'Supervisor'– e.g. Hans Solo in this case. If the supervisor has submitted you will see the date of submittal appear.

The supervisor, once he logs in, will see the following:
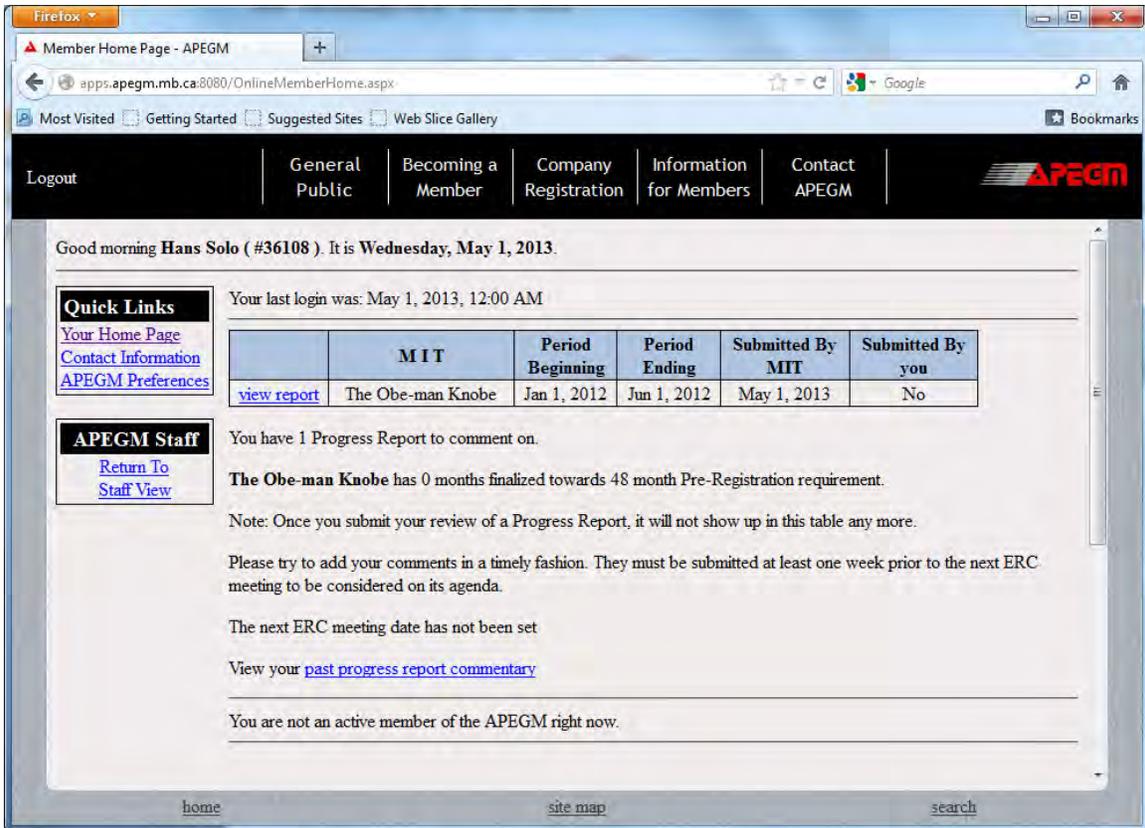
Screen 19 – Guest Supervisor Home Page

From then on, the Guest supervisor will follow the directions as outlined in Using the Online System in order to submit their portion of the report to APEGM. The supervisor should refer to page 6 onward of the Using the Online System for detailed information on how to complete and submit the report.

IMPORTANT: The guest supervisor number once set up can be used again and again, even for other Interns. If the supervisor is doing other reports for other Interns, continue to use the same number that was already set up. Please do not try to set up a new number!

Alternative Method – Intern portion:

Sometimes Interns may want to have their guest supervisors take fewer steps. Here is a way to do it:

1. Go to your home page:

Alternative Method

Obie-Wan goes back to his home page and scrolls down until he sees the following:
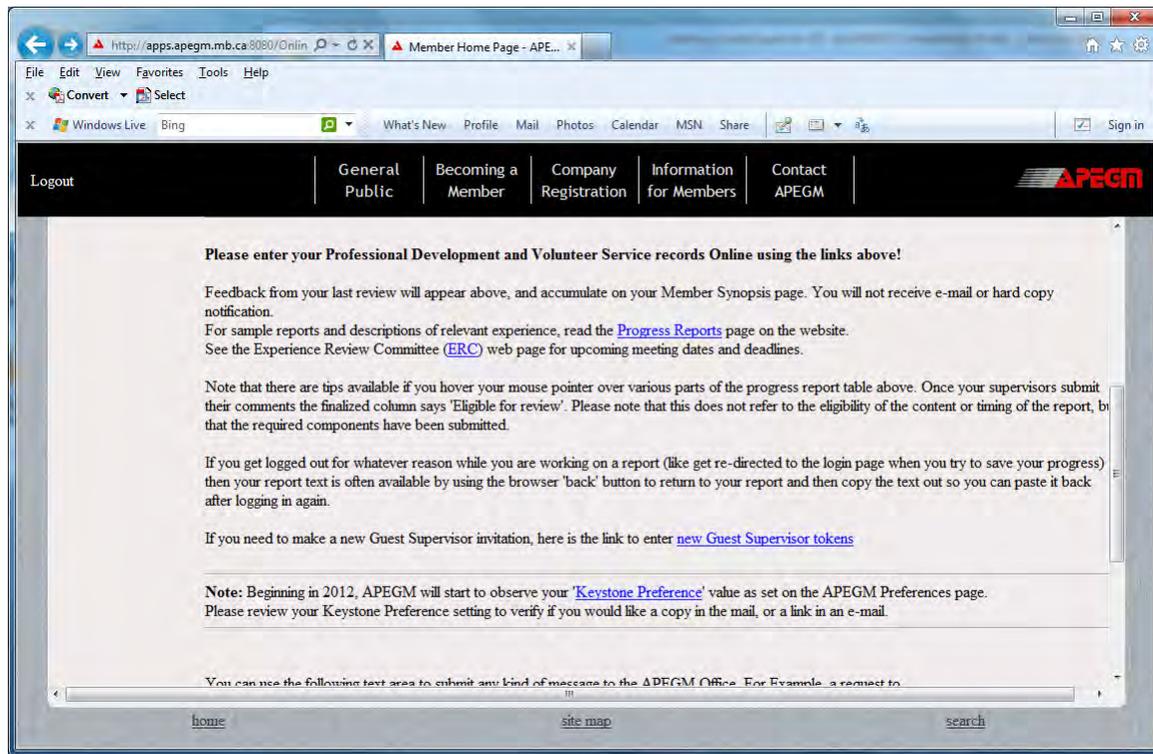


Screen 20 – Obie-Wan's Home Page – Srolling down

Clicking on new Guest Supervisor tokens:
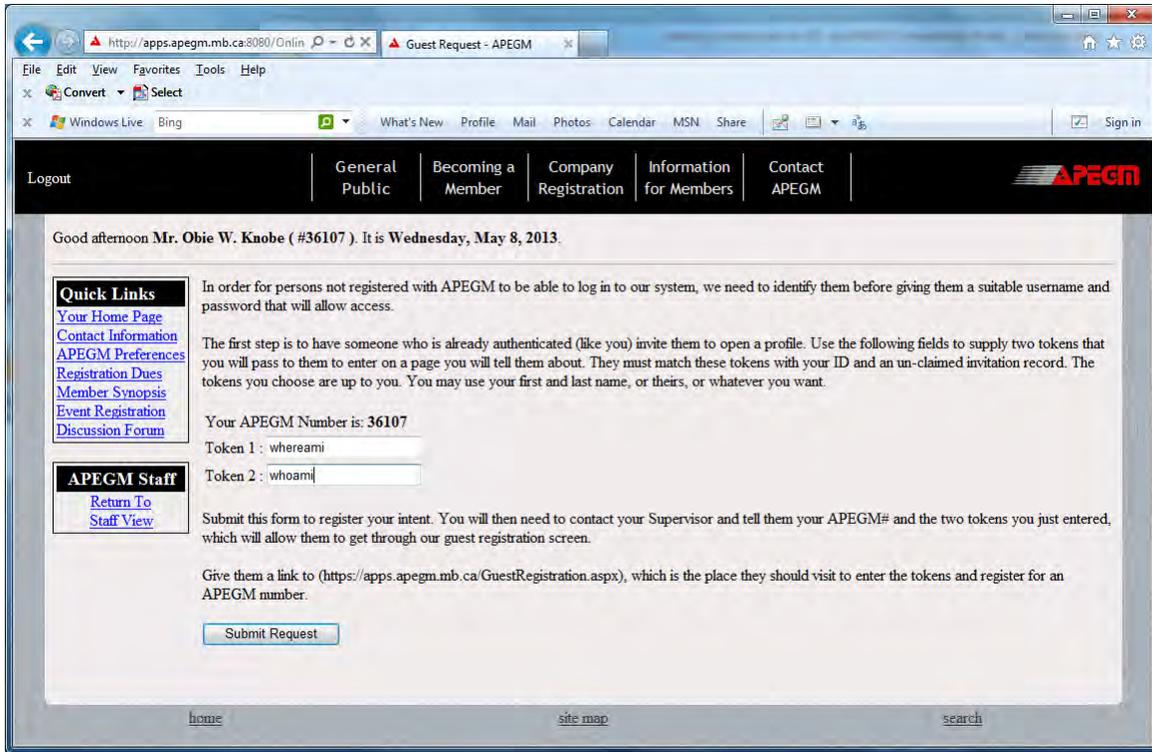
Screen 21 – Inputting Guest Supervisor Tokens

Clicking the **Submit Request** button:
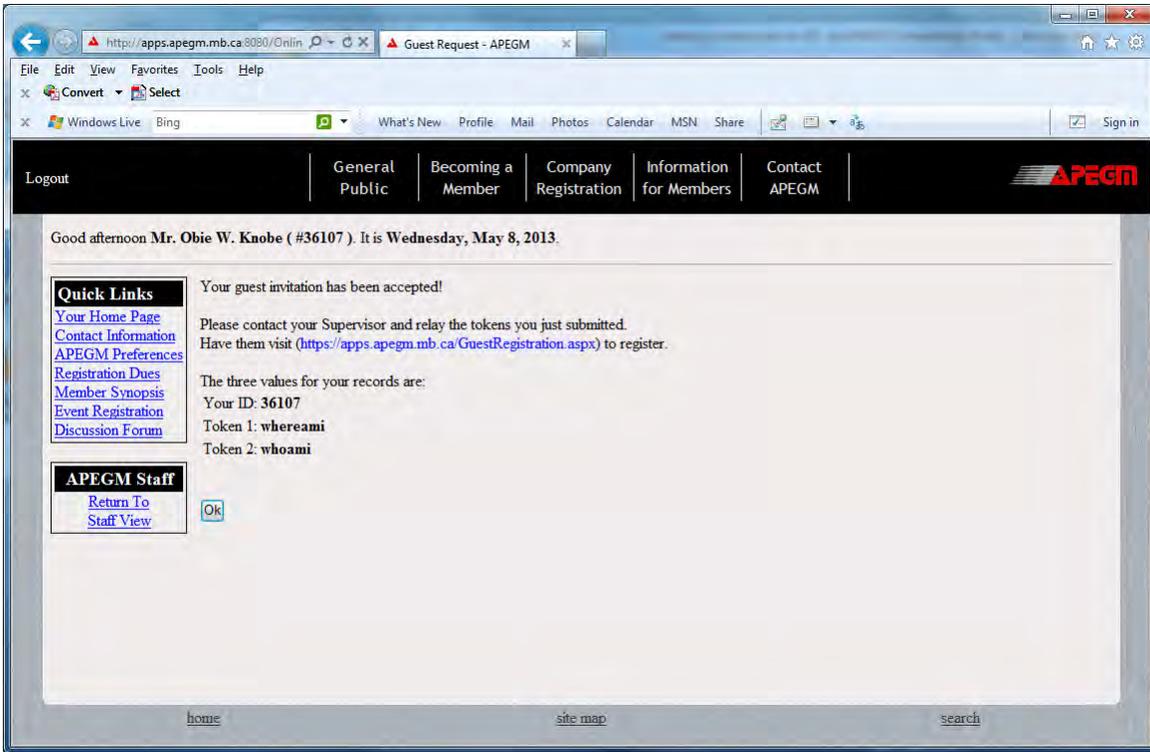
Screen 22 –Shows the Tokens that will be used
Click the **Ok** Button to Return to the Home page and then scroll down:
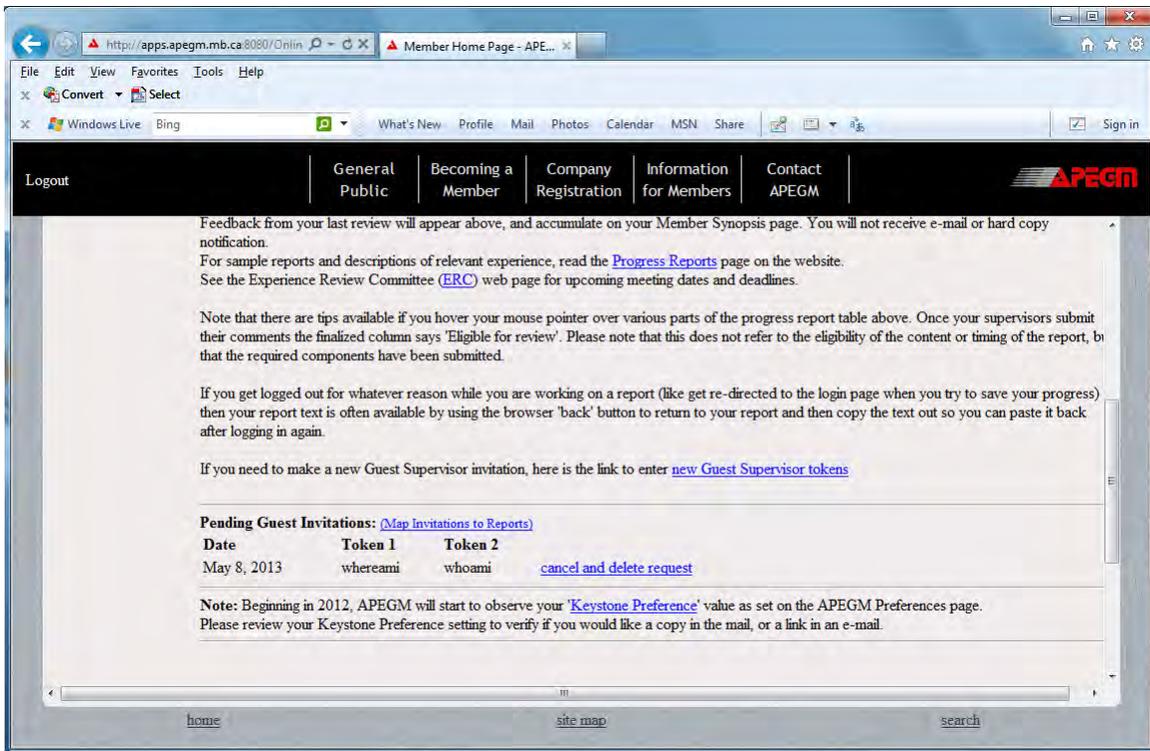


Screen 23 – Shows the Pending Guest Invitations – (Map Invitations to Reports)
Click Map Invitations to Reports:
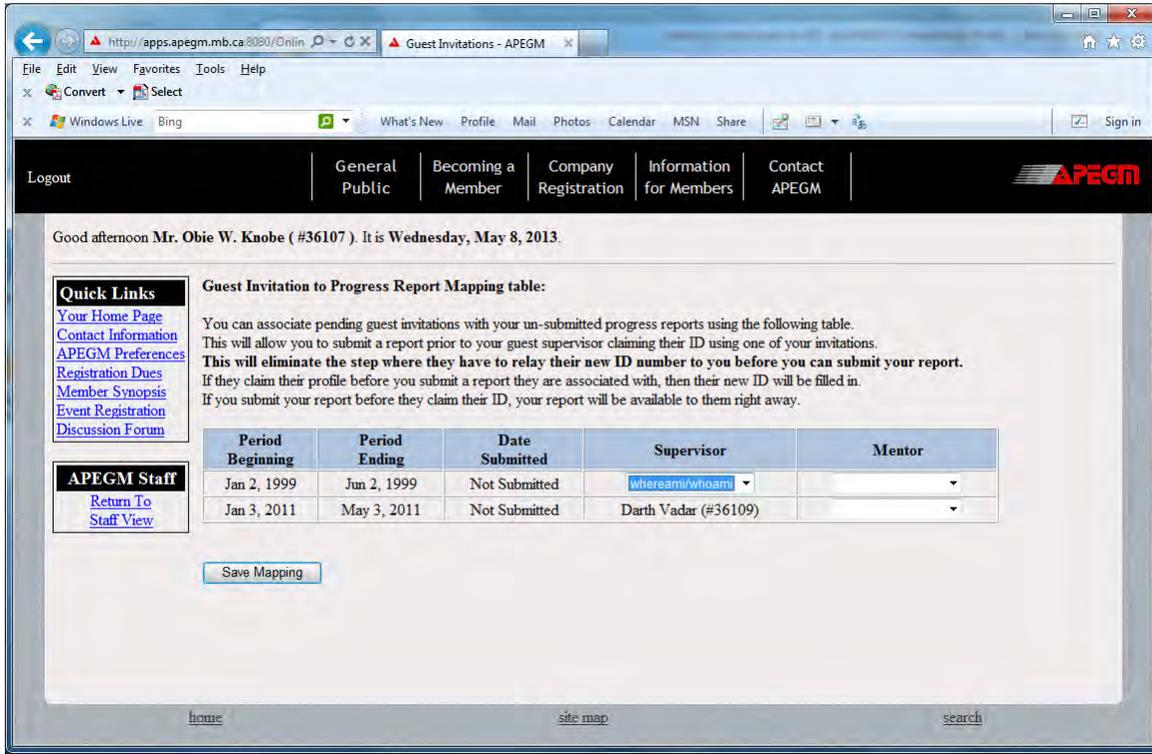
Screen 24 – Selecting the tokens from the drop down box

**CAUTION: If you have more than one guest supervisor to whom you are sending different reports, make sure that you create and use different tokens! Once the guests have CLAIMED their id's you can reuse those tokens. If you create the same tokens for multiple guests, the system will not be able to tell which guest matches with which tokens, and it's highly likely that your report will end up being routed to the WRONG guest supervisor.**
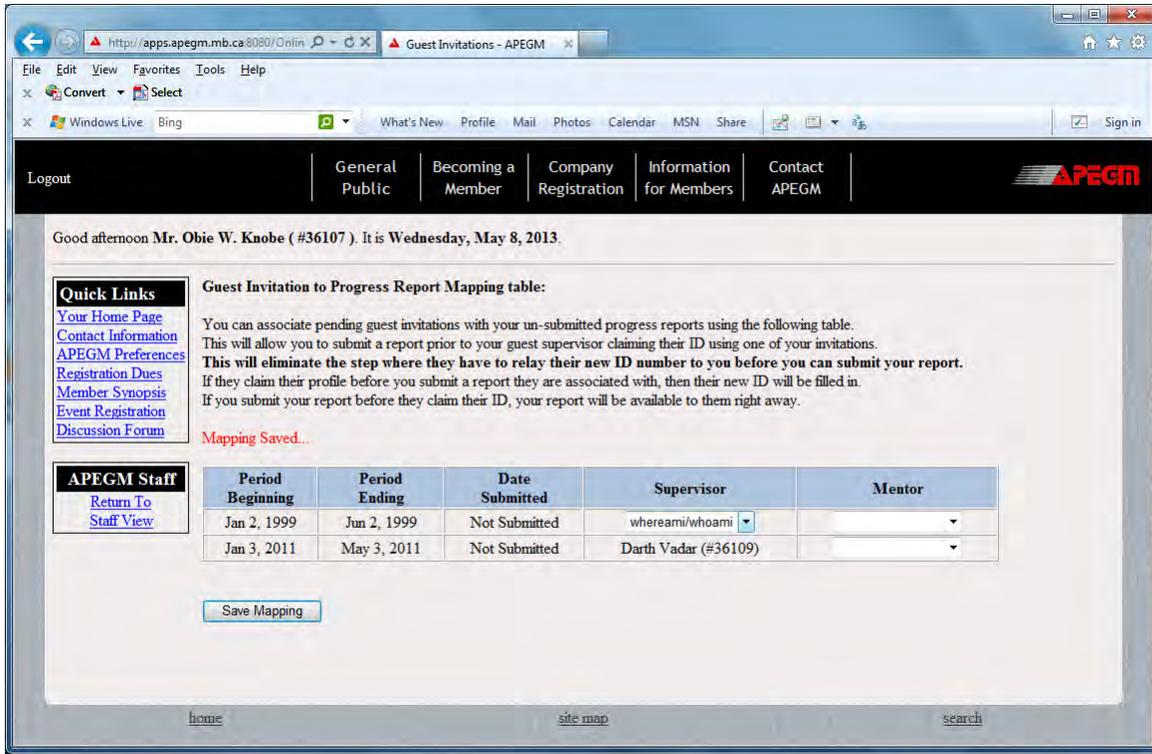
Screen 25 – Tokens have been selected for progress report from January 2, 1999 to June 2, 1999

Select the **Save Mapping** button and Scroll back up:
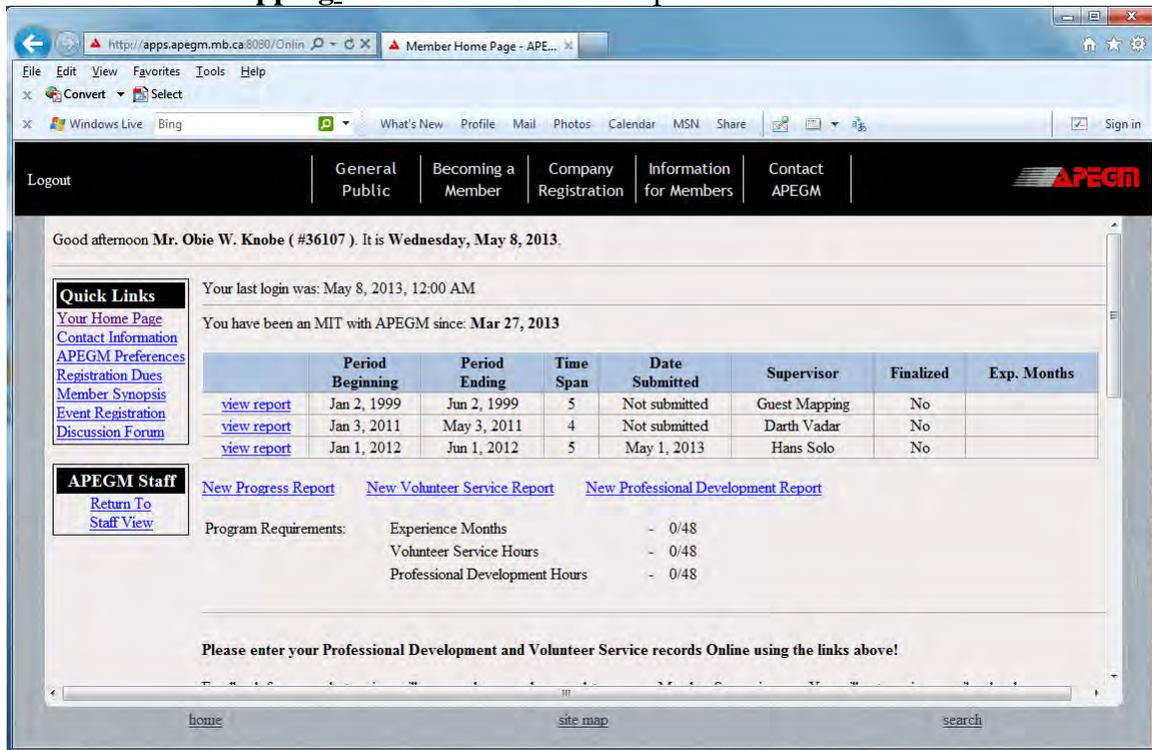


Screen 26 – Home Page shows that Supervisor has a Guest mapping

Screen 27 – Viewing this progress report

Clicking on Modify Report Details:



Screen 28 – Showing details of progress report

Click on the **Save** button and go to the end of the report:
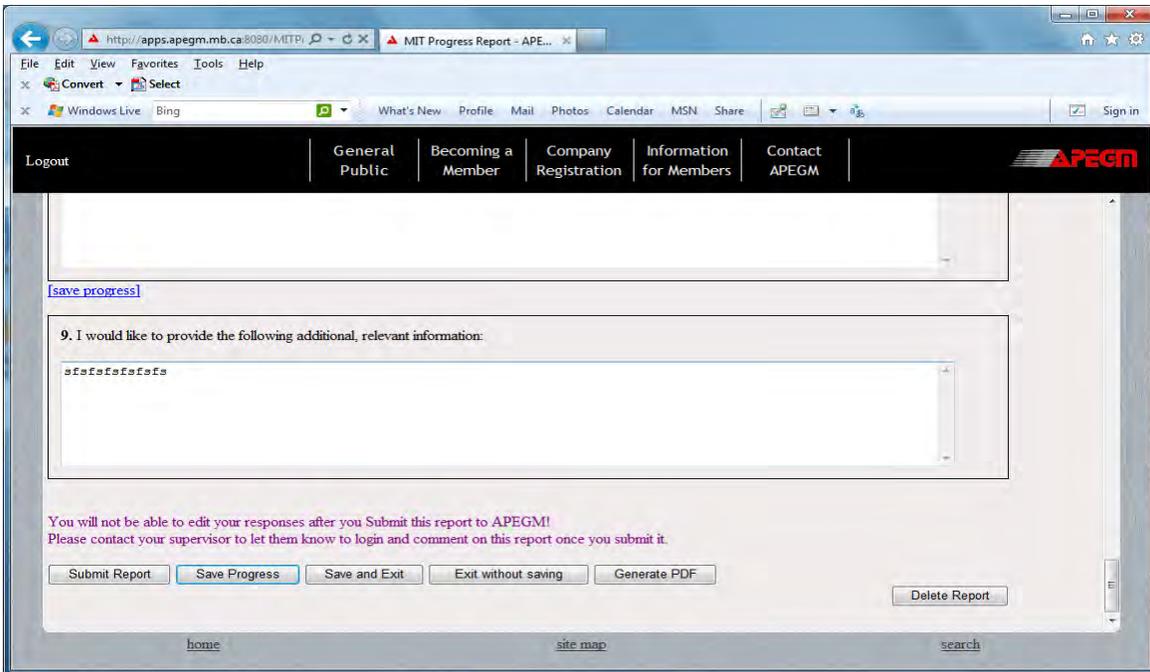
Screen 29 – Scrolling to the End of the Report
Once the report is ready, click the **Submit Report** button.
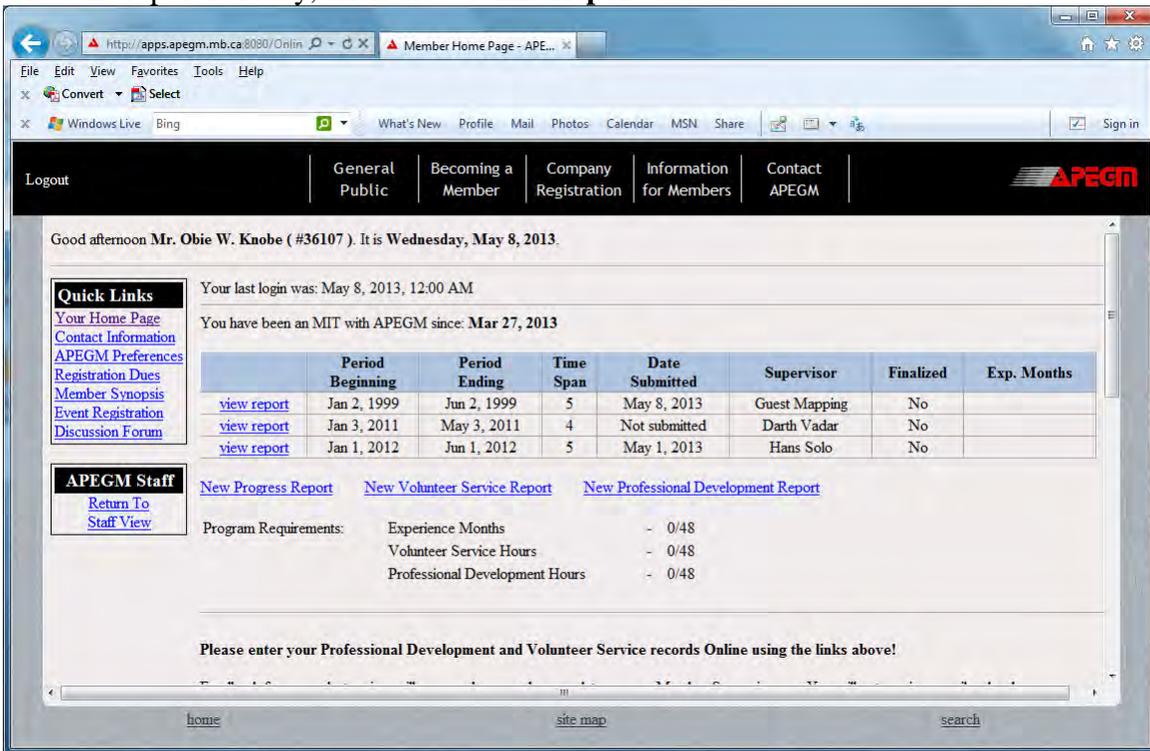


Screen 30 – Shows that the report has been submitted on May 8, 2013 even though the guest supervisor does not yet have an id!

Guest Login:



Screen 31: Guest supervisor login and input of the tokens  (Guest then clicks Submit)



Screen 32 – Guest Supervisor Portion - Guest supervisor enters details
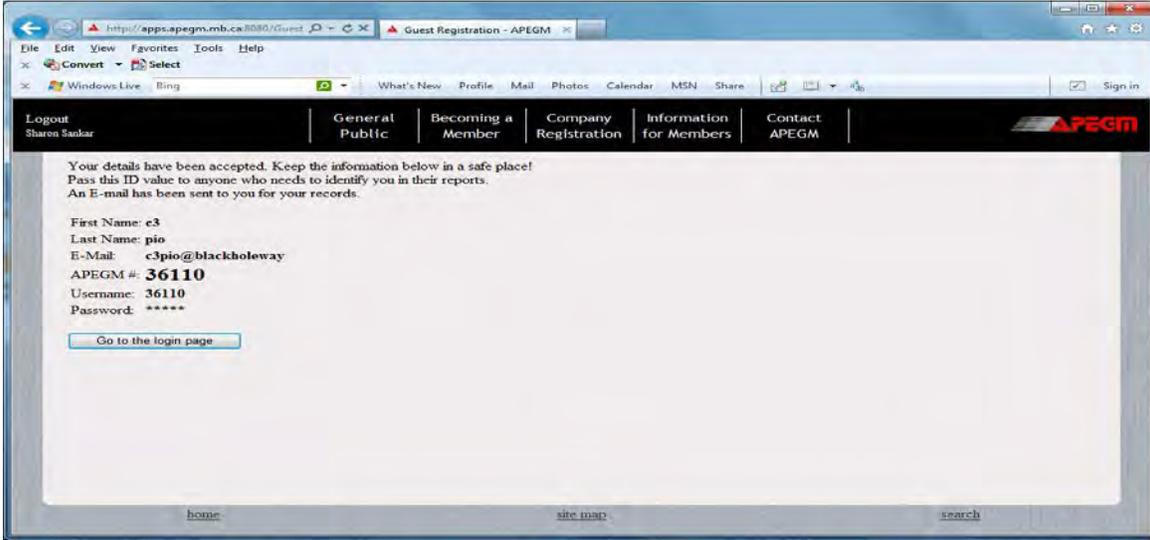
Screen 33 – Details are confirmed – the Guest number in this case is: #36110

The guest should remember this number and give it independently to the MIT or any future MITs that he/she will be supervising.

The guest selects the **Go to the login page** button:
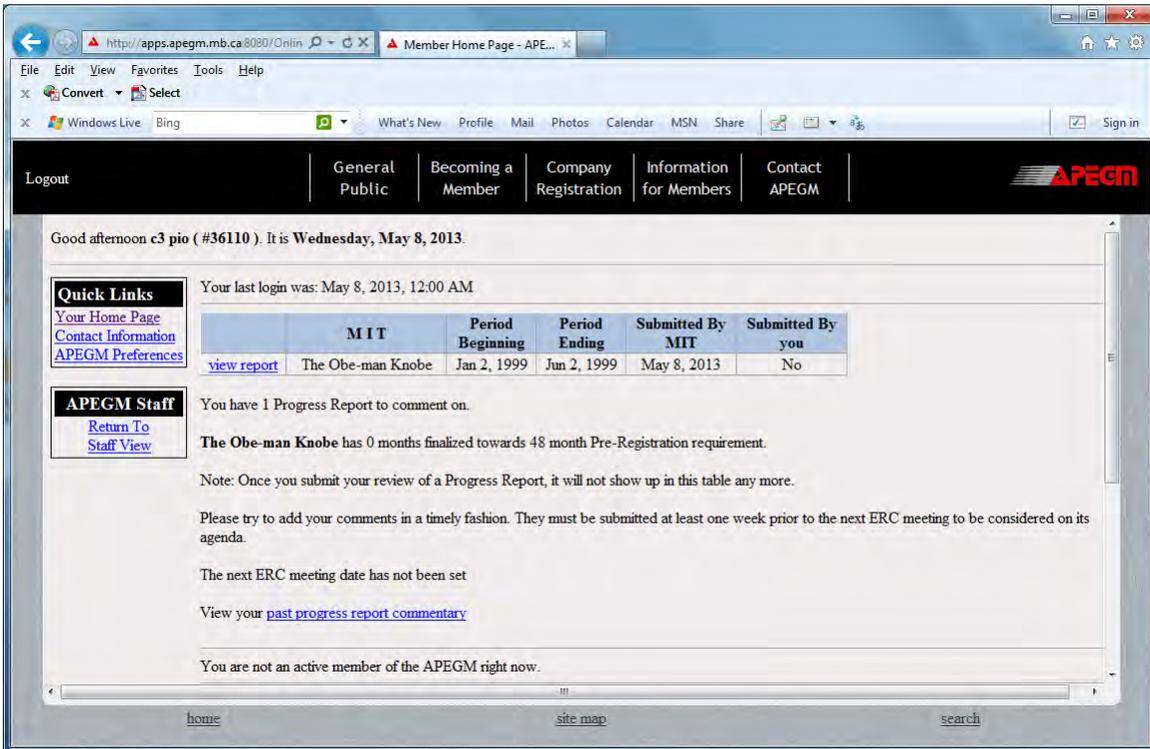


Screen 34 – Guest supervisor immediately sees the report submitted by the Intern