CalSOAP System

USER MANUAL

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Cal-SOAP System Modules

Security Module –Security is comprised of three subsystems; Employee, User and Role. Employee is vital to define the people who will directly and indirectly take part in student activities. Employees are made up of purely administrative staff and student staff. Each SOAP has roughly 50 employees. Employees who require access to the CalSOAP system are associated with user accounts and are given credentials to log into the system. Users of the system will be associated with a system role, which will determine the modules the user can access and the privileges (view, update, insert, delete data) within each module.

Student Module – Student is comprised of Student Demographics, Student Contacts and Student Term History. Student Demographics contain the data elements most often associated with data found on the CalSOAP application form and data available through the respective school districts. The CalSOAP system will allow the CalSOAP projects to bulk load students from district files or to manually create entries. Depending on the resources and sophistication, the volume of student data will vary greatly among CalSOAP projects. Student Contacts provides a view of all contacts a student may have who are integral in their academic success while in the CalSOAP program. Student Term History provides a school term by term view of the students GPA, school association, grade level, and the level of service the student was provided over time.

Student Activity Module– Student Activity enables the CalSOAP project to individually define services the project provides. These services are assigned categories to support algorithms, which determine the level of service a particular student received, and to determine groupings for various CSAC reports. This module also associates a student with an event on a given date and an advisor, who provided the service. A common byproduct of the student activity record is the number of events and the total time an advisor is spending with students. This module will contain the vast majority of records and will be linked to the budget component to generate an overall cost per activity measure by CalSOAP project.

Budget Module – The budget module is comprised of allocations, expenditures, pledges and contributions for the various funding sources available to the CalSOAP projects. The budget module will contain master high level account information as well as the detail that generates the budget line items for reimbursement, budget and Form A&B reports. Budget expenditures are tightly coupled with activities and will directly affect the cost per activity measure important in the Activity Report.

Reporting Module (Not Released) – The reporting module will provide efficiency and outreach measures of the CalSOAP project at any point in time. It can act as a place for approval of information to be released to CSAC at predetermined intervals. For some reports this module will also determine whether the system is locked from additional historical data. The reporting module will contain student, student activity and budget reports used by the SOAP and CSAC for all standard reporting needs.

See Appendix 1: Cal-SOAP System Conceptual Diagram for further description

Cal-SOAP System Navigation Flow

Within the entire Cal-SOAP system you will be able to identify a standard navigation flow which makes the process of moving among all screens easy to learn. Depending on the role you are assigned you will be presented with various lists of hyperlinks which give you access to the different modules of the system. The home screen presented below represents all modules available in the Cal-SOAP system and is the typical view for any user assigned to the Cal-SOAP Super User role.
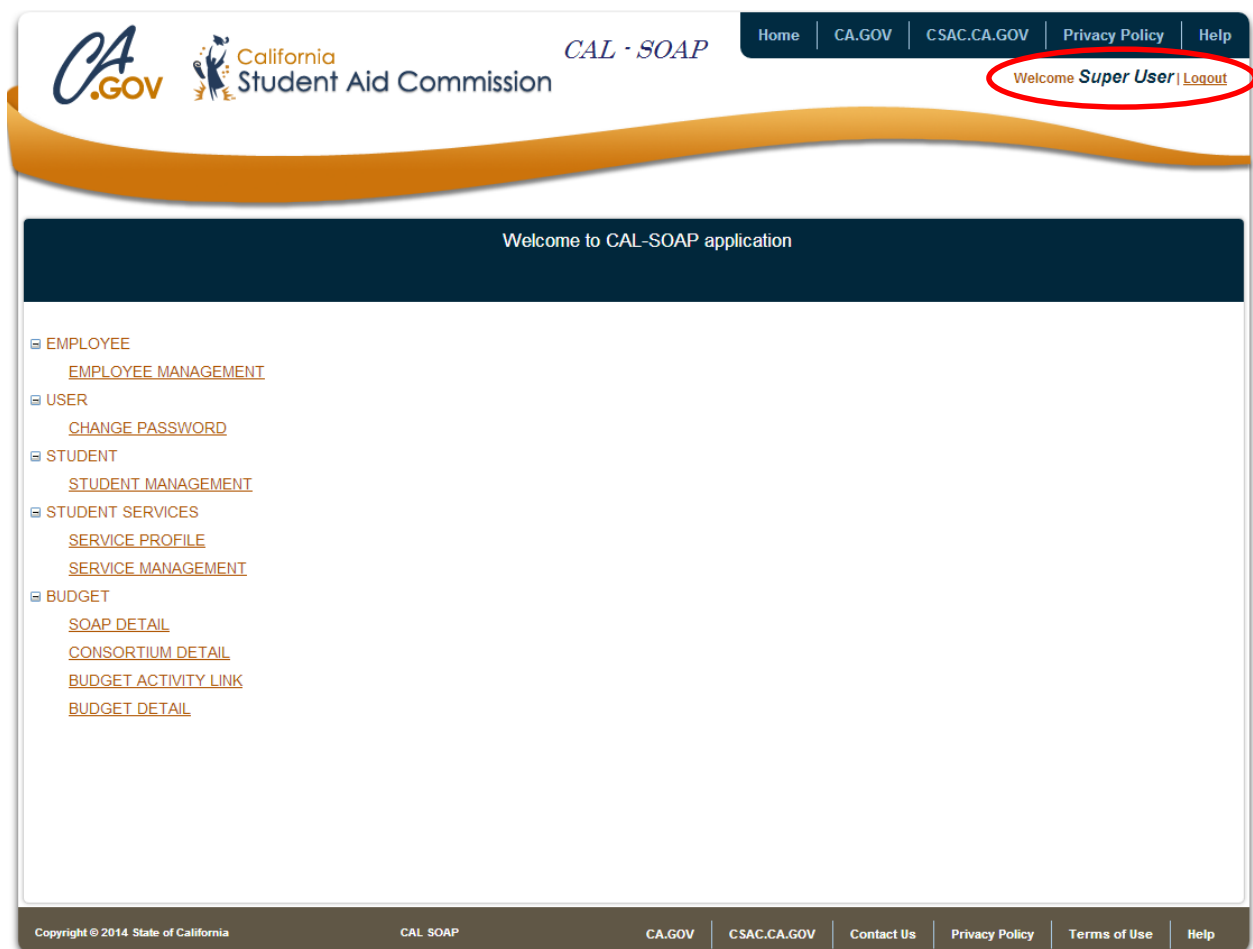
Screens that are identified as Management such as Employee, Service, User and Student refer to search screens that allow you to research current entries and determine whether you want to add or edit the respective data. Therefore you will see that the management screens are launching points to search screens which are launching points to add or edit detailed data within the system. This approach is the same throughout the system.

See Appendix 8: Screen Navigation Flow for further explanation.

Role based security, which is introduced in this system, is a mechanism to grant levels of access to the various modules within the system. Some roles provide full control of all modules, while others constrain the modules the user can access. Roles also determine whether the user can simply view or can edit the data on the screen. Based on your role, you may not see all the options shown in the previous Home screen example. The role will determine whether the user can view, add, edit or delete data within each module that has been made available.

See Appendix 9: Role Permissions, for more information on how the role based security is implemented

Below is an image of a typical Search/Management screen. As you can see the search screen provides the user the ability to search for entries that exist in the system, edit those entries by clicking on the value of the entry in the left hand column or add a new entry by clicking on the add button.

This example shows all test records created for the Eastbay Cal-SOAP employee table. This is very similar to the User, Student and Service Search/Management screens.

Most all screens available to the User with full control for the module will contain the following four standard buttons.

Search – Launches a search based on the criteria you have entered in the screen.

Reset – Removes all previous search criteria as well as any search results from previous queries.

Add – Sets the system in Add mode for the respective module.

Back – Takes you back to the previous screen.

The difference the user will see when either editing a record or adding a new record is that the subsequent screen will either be populated or blank. The screen will contain the same fields in either Edit or Add mode. Based on your role, you will have the ability to view only, save changes, add more entries or go back to the previous screen.

In the screen shot below you see the Employee Profile screen, which is how a typical data entry screen in Add mode will look. The field labels that include a preceding asterisk indicate that the field is required. You will not be able to save changes if these fields are not populated.

As with most all screens in Add and Edit mode you will have the ability, based on your role, to Save the changes you made. If you have entered the subsequent screen in Add mode, the Save button will add the data to the database as a new record. If you are in Edit mode of a current entry the Save button will allow you to alter the data related to that record.

Some screens will include an Add button for the corresponding module (Student, Employee, User, Service). If this is present, as in the example above, when clicked the screen will be cleared and will be in Add mode for all new data entry. Upon completing all the required fields, you will need to click on Save to commit the new entry to the database.

Most all screens also have a Back button which allows you to return to the previous screen without saving any changes.

Help

The online help found on the home page includes the most up to date copy of this document. It is only available to the user once they have logged in to the system. IF you are not logged in and click on the Help hyperlink found at the top right hand corner of all CalSOAP System screens you will receive a message the document is only available to authorized users.

To get to a copy of this manual using the online Help perform the following.

1. Log in to the CalSOAP system using your credentials.

If you do not log in you will receive the following message.

Cal-SOAP System

The Cal-SOAP system is available to authorized Cal-SOAP users only. If you are a current user and unable to log in successfully, please contact your respective
Cal-SOAP project director to review your user credentials.

Upon successful log in, you can access a wide range of user training materials under the Help hyperlink.

Thank you,
Cal-SOAP System Administrator

2. Upon successful login, click on the Help hyperlink found on the top right hand corner of the Home page.
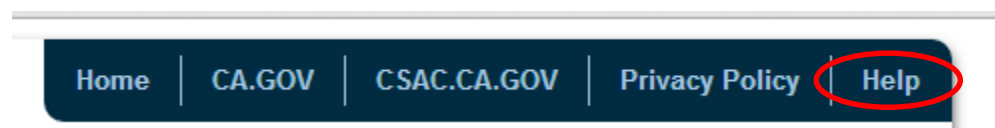
You will be presented with the following text.

Cal-SOAP System

Click to download file
File access password:

Thank you,
Cal-SOAP System Administrator

3. Click on the blue hyperlink with the description "Click to Download File".

This will download the file to your machine and can be accessed by clicking on the actual download.

4. As the file is opening it will request that you enter a password. The password is provided in the download screen under the hyperlink you clicked on to download the file. The password has been blanked out from the screen shot above for security reasons. Enter the password and the file will open.
5. Click on the Home hyperlink found to the left of the Help hyperlink to return to the CalSOAP System Home screen.

| Home | CA.GOV | CSAC.CA.GOV | Privacy Policy | Help |
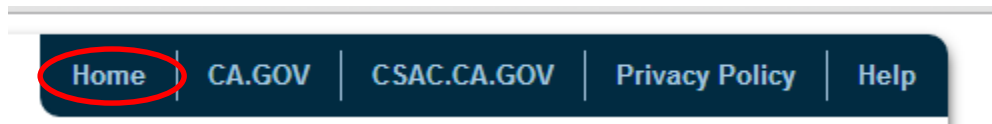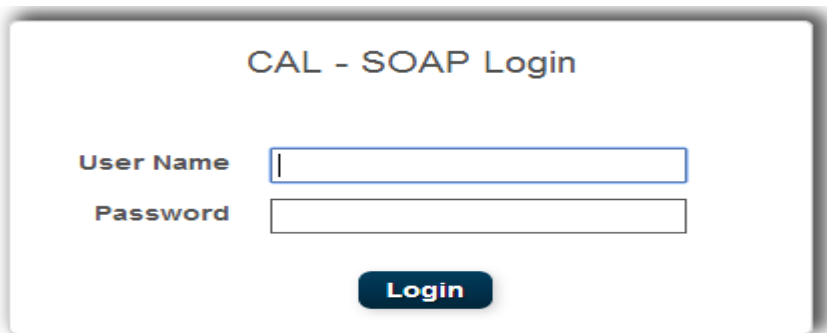
Logging In

The process to log in to the Cal-SOAP system insures only authorized employees have access to the Cal-SOAP modules and data.

1. Enter your credentials provided you by either CSAC if you are the initial Cal-SOAP Super User or those that were provided by your respective Super User.

   The URL for this screen is: http://webtest/DEV02/CalSOAPWeb/app/Login.aspx
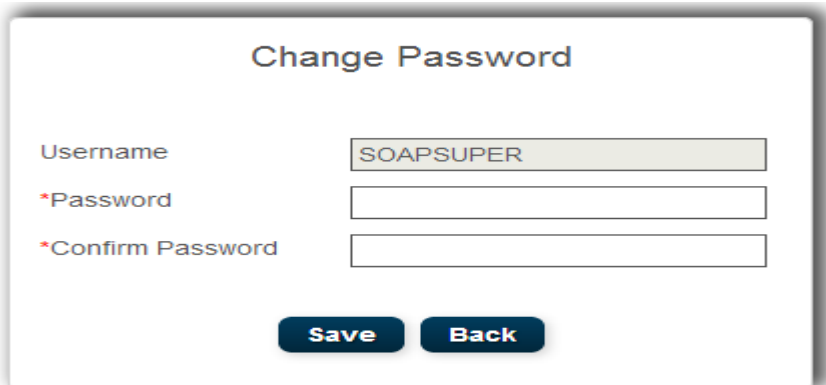
If you fail to enter your password correctly three consecutive times, you will be locked out for a prescribed amount of time. It is important to be attentive when entering your username and password. Usernames are not case sensitive, but passwords are. If you believe you have entered the correct username and password, make sure to check to see if Cap Locks are on or off prior to submitting these values again.

At the time of writing this document the password requirements were defined as the following:

1. At least one uppercase character
2. At least 6 characters long
3. At least one numeric character

The username will follow your respective Cal-SOAP Super User standards.

2. If this is the first time you are logging in, or your password has been reset, or your password has expired due to inactivity, you will be required to change your password before gaining any access to the system. In this case you will be presented with the change password screen in which you must supply a new password and confirm that password and click on Save.

3. Once you have successfully logged in verify that you are assigned to the correct SOAP Project by clicking on Employee Management hyperlink and viewing the SOAP name in the top search criteria textbox as shown below.

4. Click on the Back button in the Employee Management screen to return to the Home screen.

Note: If your user account was created without linking it to an employee record, you will receive an error indicating this and you will not be able to access any of the system features. You must contact your respective Super User or CSAC Admin if you are the Super User for the Cal-SOAP Project. Once the user account is associated with your employee record, you will have access to the corresponding features based on your role.
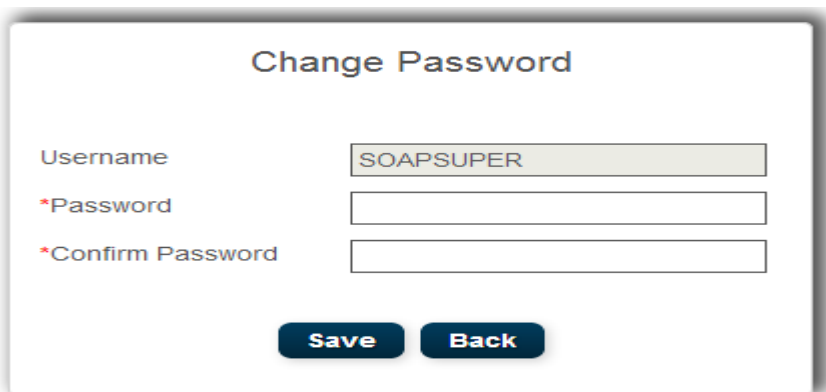
Password Change

1. From the home screen any user can change their password by clicking on the Change Password hyperlink under the User caption.
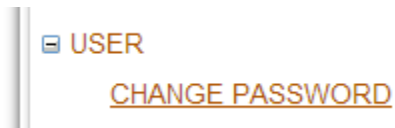
Upon clicking on the Change Password hyperlink, you will be presented with the following screen.

2. Enter your desired new password based on the password requirements defined by CSAC in the password and confirm password fields and click on the Save button.

At the time of writing this document the password requirements were defined as the following:

1. At least one uppercase character
2. At least 6 characters long
3. At least one numeric character

Passwords are remembered by the system. You will not be able to reuse a password from your previously used passwords. If you choose not to change your password, you can simply click on the Back button and return to the home screen.

CSAC Admin Account Management

Adding a User

In the event a Cal-SOAP project has no access to the Cal-SOAP system (Project Director leaves, or a new Cal-SOAP project is created), the administrator is the only role which can create new initial accounts for the Cal-SOAP project. The administrator will need to create an account with the Cal-SOAP Super User role.
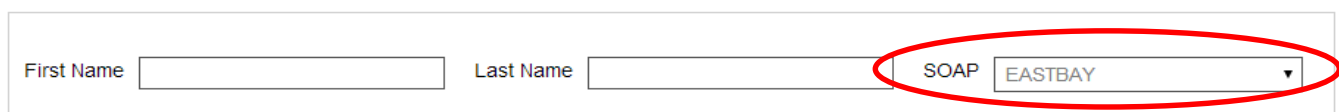
Role Based Security

The Cal-SOAP system supports role based security and is developed with the following roles by default.

- Admin User– CSAC Employees only, who will help administer any Cal-SOAP account, review reports and manage Cal-SOAP project entries.
- Super User – Cal-SOAP role which has full access to the respective system components necessary for a Cal-SOAP to document students, student activities and budget activities. Only Super User accounts can delete data in those screens where this option is available.
- Student Staff User – Cal-SOAP role which has full access to all student related screens.
- Student Staff Viewer – Cal-SOAP role which has limited access to all student related screens. Users who have this role will only have the ability to view student related data.
- Budget User – Cal-SOAP role which gives the user full access to budget related screens.

All users of the system have the ability to change their password at any time. Based on the role the user is given, there will be a varied number of screens available to the user upon login.

The process to create a new user account and assign a role is provided below.

1. Enter credentials as Administrator in the Cal-SOAP login screen.

   The URL for this screen is: http://webtest/DEV02/CalSOAPWeb/app/Login.aspx

2. Upon successful login, the Admin user will click on the option under User caption identified as User Management.

3. Within the User Management screen the Admin user can decide either to Search for the User record to insure it does not already exist or simply choose to add the user by clicking on the Add User button. Search in this screen can be done by simply choosing the Search button without entering any search criteria or specifying exact match criteria in the available search criteria options.

Total number of records :8

First Name	Last Name	User Name	Email
ADMIN2	USER	SOAPADMIN2	ADMIN2@TEST.COM
ADMIN	USER	SOAPADMIN	ADMIN@TEST.COM
SUPER	USER	SOAPSUPER	SUPER@TEST.COM
STUDENTSTAFF	USER	SOAPSTUDENTS	STUDENTSTAFF@TEST.COM
STUDENTVIEWER	USER	SOAPSTUDENTV	STUDENTVIEWER@TEST.COM
BUDGET	USER	SOAPBUDGET	BUDGET@TEST.COM
MARK2	USER	SOAPMARK2	MARK@TEST.COM
MARK	USER	SOAPMARK	MARK@TEST.COM

4. Click on Add User button if the user does not already exist. Enter all required data as indicated by the red asterisks to create a user account. There should be a standard username and password convention used when setting up these initial accounts for CSAC Admin or Cal-SOAP Super User employees.

See Appendix 9: Role Permissions to determine the correct role for each User or refer to any instructions from PASD.

5. Once the data is saved you must link this account to an employee record by clicking on Link Employee. This will hand off the common data values to the Employee Profile screen and provide you the ability to create the employee entry. This is where you also associate the user/employee with their respective Cal-SOAP Project.

Note: If the user is associated with the administrator role, the Soap Type should be a CSAC type and not one of the Cal-SOAP Project's types.

6. Save your changes and return back to user search results by clicking on the Back button.
7. Inform the user of their credentials. The user will be required to change the password upon initial login.

User Access Deactivation

1. Follow steps 1-3 as described for creating a new user account for an employee and click on the user's name in the results.
2. Click on Link Employee button.
3. In the employee's Profile, enter a Termination Date. By entering a date in this field, the user entry will be effectively deactivated. The user and employee records will not be altered, thus preserving the link between the two entries. However, the user will no longer have access to the Cal-SOAP System.

4. Click save.

User Access Reactivation

1. Follow steps 1-3 as described for creating a new user account for an employee and click on the user's name in the results.

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2. Click on the Link Employee button.
3. Remove the termination date from the Employee Profile screen for the affected employee. The user will be reactivated with the same role, title and SOAP affiliation as before.

Editing User Record

1. User related data can be edited by following steps 1-3 for adding a new user described above.
2. After searching for a particular user and receiving the search results, the admin user can simply click on the highlighted name in the left hand column for the user you wish to edit.

Total Number of record :8

First Name [   ]   Last Name [USER   ]   SOAP [EASTBAY ▼]   [Search]

First Name	Last Name	Phone Number	Email
BUDGET	USER	(916) 454-7878	BUDGET@TEST.COM
MARK	USER	(916) 555-1212	MARK@TEST.COM
MARK2	USER	(916) 666-6666	MARK@TEST.COM
STUDENTSTAFF	USER	(916) 454-7878	STUDENTSTAFF@TEST.COM
STUDENTVIEWER	USER	9164547878	studentviewer@test.com
SUPER	USER	(916) 454-7878	SUPER@TEST.COM
TESTUSERID	USER		
USERTEST	USER		

This will place you in the User Profile screen where you can update user related data.

Data that is common between user and employee will be updated simultaneously with the employee profile. There is no need to enter into the Employee Profile screen. It is recommended that you utilize the User Profile screen to alter username, role and password and the Employee profile to update employee demographic data. This is not required, however.

3. Save your changes.
4. Return to previous screens by clicking on the Back button.

Cal-SOAP Super User Account Management

Adding an Employee Profile

The process to create a new employee account and assign a user role is provided below.

1. Enter credentials as Super User in the Cal-SOAP login screen.

   The URL for this screen is: http://webtest/DEV02/CalSOAPWeb/app/Login.aspx

2. Upon successful login, the Super User will click on the option under Employee caption identified as Employee Management.
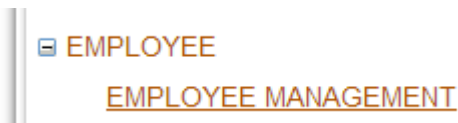
3. Within the Employee Management screen the Super user can decide either to search for the Employee record to insure it does not already exist or simply choose to add the employee by clicking on the Add button. Search in this screen can be done by simply choosing the Search button without entering any search criteria or specifying exact match criteria in the available search criteria options. The employees will only pertain to the user's respective Cal-SOAP project affiliation.

First Name		Last Name	USER	SOAP	EASTBAY ▼

Search   Reset   Add   Back

First Name	Last Name	Phone Number	Email
BUDGET	USER	(916) 454-7878	BUDGET@TEST.COM
MARK	USER	(916) 555-1212	MARK@TEST.COM
MARK2	USER	(916) 666-6666	MARK@TEST.COM
STUDENTSTAFF	USER	(916) 454-7878	STUDENTSTAFF@TEST.COM
STUDENTVIEWER	USER	9164547878	studentviewer@test.com
SUPER	USER	(916) 454-7878	SUPER@TEST.COM
TESTUSERID	USER		
USERTEST	USER		

4. Click on Add Employee button.   Enter all required data as indicated by the red asterisks to create an Employee record. The Cal-SOAP affiliation will default to the Cal-SOAP of which the user belongs, who is adding the profile.
5. Ensure the Soap Type field contains your Cal-SOAP name. If it contains a SOAP Type that is not your own, please notify your CSAC contact as soon as possible, since you are tied to the wrong Soap Type
6. Then save the employee record by clicking on the Save button.

Employee Profile

*First Name	SUPER	Middle Initial	
*Last Name	USER	*Date of Birth	01/28/2010
Address 1	123 SOAP ROAD	Address 2	SUITE 100
City	SACRAMENTO	State	CA ▼
Zip	95812	Phone Number 1	(916) 454-7878
Phone Number 2	(916) 548-2145	Email Address	SUPER@TEST.COM
Title	SUPER USER	*Soap Type	EASTBAY ▼
*Hire Date	06/10/2013	*Employee Type	Teacher ▼
Termination Date		User Access	Yes

Save   Link User   Back

Adding User Access to an Employee Profile

If the employee requires access to the Cal-SOAP system, you will need to link the employee to a user record.

1. Follow steps 1-3 for adding an employee profile and choose the employee name from the search results. Then press Link User button in the employee profile screen.
2. This will hand off the common data values to the User Profile screen and provide you the ability to create the user entry. It is important to establish a standard Username convention when setting up users. This helps in identifying users and makes it easy for users to remember. It is also in this screen where you define the role for the employee's user account.   The Super User and Administrator roles can only be administered by the CSAC Admin and not the Cal-SOAP Super User.

   Note: Linking to User Profile is not required. It is only necessary if the employee needs access to the system. Many employees who are advisors to students will not require this access unless they are required to view or edit system data.

   See Appendix 9: Role Permission to determine the correct role for each User.

User Profile

*First Name	SUPER	Middle Initial	
*Last Name	USER	*Date of Birth	01/28/2010
*Address 1	123 SOAP ROAD	Address 2	SUITE 100
*City	SACRAMENTO	*State	CA
*Zip	95812	Phone Number	(916) 454-7878
*Email Address	SUPER@TEST.COM	*User Role	SUPER_USER
*User Name	SOAPSUPER	*Password	

Save **Back**

3. Save your changes and return back to the previous screens by clicking on the Back buttons in each of the screens.
4. If the employee has been provided a user account, inform the user of their credentials. The employee will be required to create a new password once they successfully login using the credentials you provide initially.

Editing an Employee Profile

1. Employee related data can be edited by following steps 1-3 for adding a new employee as described above.
2. After searching for a particular employee and receiving the search results, the super user can simply click on the highlighted name in the left hand column for the employee you wish to edit.

This will place you in the Employee Profile screen where you can update employee related data.

Data that is common between employee and user account (if employee has access to the Cal-SOAP system) will be updated simultaneously with the user profile. There is no need to enter into the User Profile screen.   It is recommended that you utilize the User Profile screen to alter username, role and password and the Employee profile to update employee demographic data. This is not required, however.

3. Save your changes.
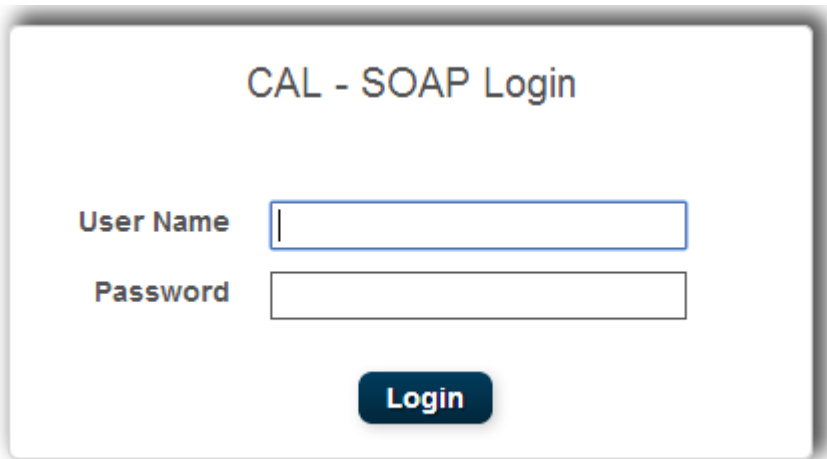4. Return to previous screens by clicking on the Back button.

Editing a User Account

1. User related data can be edited by following steps 1-3 for adding a new employee as described above.
2. After searching for a particular employee and receiving the search results, the super user can simply click on the highlighted name in the left hand column for the employee you wish to edit.
3. Within the Employee Profile screen, click on Link User.
4. Edit the data in the User Profile screen and click on the Save button.

Note: If you alter any data specific to the User record, you must provide a new password and notify the user of the change. The user will be required to change the password upon subsequent login.

Role Based Security

The Cal-SOAP system supports role based security and is developed with the following roles by default.

- Administrator– CSAC Employees only, who will help administer any Cal-SOAP account, review reports and manage Cal-SOAP project entries.
- Super User – Cal-SOAP role which has full access to the respective system components necessary for a Cal-SOAP to document students, student activities and budget activities. Only Super User accounts can delete data in those screens where this option is available.
- Student Staff User – Cal-SOAP role which has full access to all student related screens.

- Student Staff Viewer – Cal-SOAP role which has limited access to all student related screens. Users who have this role will only have the ability to view student related data.
- Budget User – Cal-SOAP role which gives the user full access to budget related screens.

The Super User and Administrator roles can only be administered by the CSAC Admin and not the Cal-SOAP Super User.

All users of the system have the ability to change their password at any time. Based on the role the user is given, there will be a varied number of screens available to the user upon login.

See Appendix 9: Role Permissions to review the correct role for each User.

User Access Deactivation

1. Follow steps 1-3 as described for Adding an Employee Profile and click on the name for the employee in the search results.
2. In the employee's Profile, enter a Termination Date. By entering a date in this field, the user entry will be effectively deactivated. The user and employee records will not be altered, thus preserving the link between the two entries. However, the user will no longer have access to the Cal-SOAP System.

3. Click save.

User Access Reactivation

1. Follow steps 1-3 as described for Adding an Employee Profile and click on the name for the employee in the search results.
2. Remove the termination date from the Employee Profile screen for the affected employee. The user will be reactivated with the same role, title and SOAP affiliation as before.

Student Import

Student Import is a powerful tool available to you to bulk load student records based on a strict import file specification. Student import relies on the availability of a precise file which must contain valid student data that comes from a trusted source. The assumption is that this process relies on a file which will come from your respective districts and contains complete data for all the fields in the import specification provided in Appendix 5.

The Student Import process relies on the student's permanent ID to reduce the possibility of duplication. Although the permanent ID is not required to load students in this manner, by not including this field you take a greater risk in creating duplication. Duplicate students are determined in the system using the student's first name, last name and date of birth (DOB). If you do not include the permanent ID and any of the demographic fields change, once a subsequent file is loaded, you will get an additional student record for the same student with slightly different demographic characteristics. If the student's permanent ID is included in every upload, the student's demographics can change in subsequent loads, which will result in that student's demographics being updated as expected.

The import process is quite simple once you have a valid file ready to load.

1. Begin by clicking on the hyperlink on the Home page under Student caption with the description of Import File.

    IMPORT STUDENT DATA

This will take you to a simple import screen similar to the screen shown below. Depending on your browser the screen may look different, but the functionality is the same.

2. Click on the Choose File (Browse) button to navigate to the file to import. This will bring up a typical dialogue box, which you should be familiar with in many Microsoft tools when navigating to files you wish to save or open.
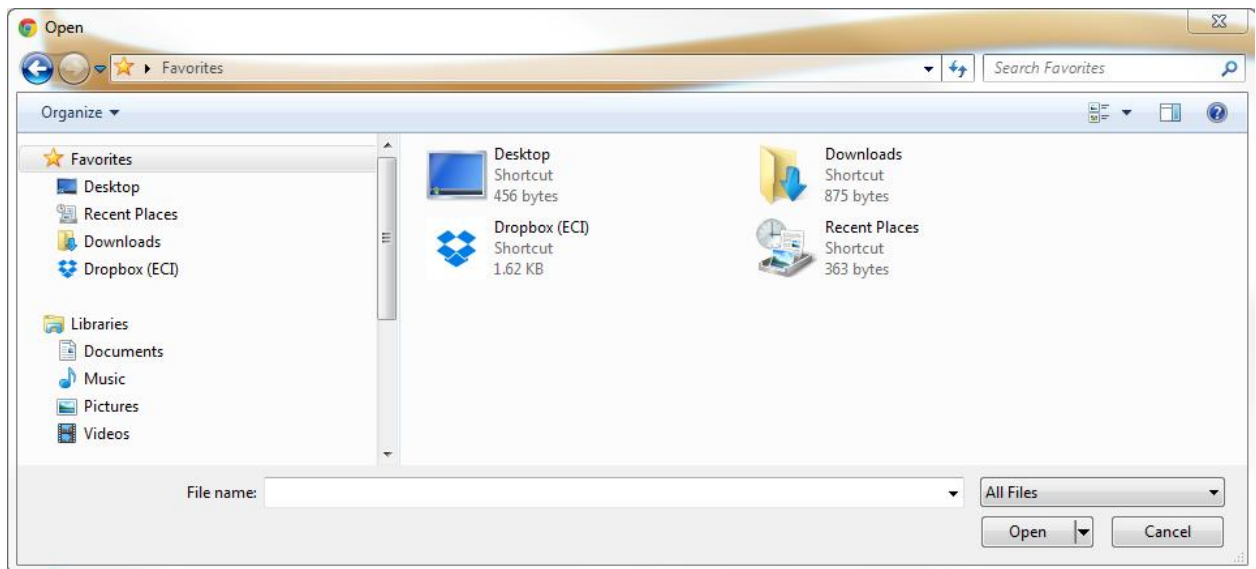
3. Select the file you want to import and click on the Open button on this dialogue box.

The file name will appear in the textbox on the import screen. In the example below, the file named Student_Import_Data.txt was chosen.

Choose File Student_Import_Data.txt
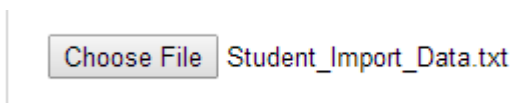
4. Click on the Import button.

When the upload process completes you will see a hyperlink to the file which contains the results of the import process. It will include information about the number of records processed, the number of inserted records, the number of updated records and will list errors identified throughout the process if any.

5. Review the process result's file to determine if any additional updates are necessary based on any errors.
6. Click on Back button to navigate back to the Home screen.

See Appendix 5: File Import Specification to see details about the Student Import File Layout and import rules.

Student Management

Based on your role, you will have access to the Student Management screens from the Cal-SOAP system home screen. Your role will also determine whether you have the ability to make changes to the student record, add additional students, or simply view details about the student records.

Student Management allows you to search for and depending on role add student records associated with your respective Cal-SOAP project. From the main Student Demographics screen you can also view the student's contact and term history information. The Student Demographics screen is comprised of a two-tab screen and contains the information typically provided in a file supplied by the school district (if you perform bulk imports) and data typically found in a Cal-SOAP application.

If you have access to the Student Management screens you will be able to access this functionality by clicking on the Student Management hyperlink under the Student caption on the Home screen.
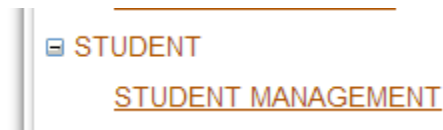
Upon clicking on the Student Management hyperlink you will be presented the following Student Search screen.

From the Student Management screen you can search for students associated with your Cal-SOAP project by a number of different criteria. Simply include any pertinent criteria from the available criteria items and click on the Search button. You can also reset the screen and clear all criteria and previous results by clicking on the Reset button.

Important Student Features

Partial Match Searches

The Student Management screen allows for partial match searches within the Last Name search field. To perform a partial match, include the % sign after the partial search value for the student's last name. For example, to search for the students, whose last name begins with "And…" for Andersen or Andrews, type AND% in the Last Name search field. All students, whose last name begins with And, will appear in the search results once the search has completed.

Status

Important to note in this screen when adding new students is the Status dropdown data element. Student Status is comprised of three different states; Never Applied, Active and Inactive.

Never Applied

These are students who can be found in the system, but have never applied to the Cal-SOAP program.

- These students will not be available to be added to services and do not show up on any reports

- If there is a need to report the percentage of Active students to all others, these can be used in the denominator

Inactive

Inactive Students are those who had once applied but are now considered inactive due to graduation, they dropped out of school or requested to no longer take part in the Cal-SOAP Program.

- If Inactive, the student will not be available to include on services

- Inactive students who have had services for current reporting year will show on activity reports for those date ranges

Active

These are students who are in the system and have applied to the Cal-SOAP program and made active through data import or manually by a user.

- Active student will be available to be added to services and are reported where applicable

- Qualify as General – When specified in services, but do not meet Level1 criteria for school year ending in August

- Qualify as Level1 – When specified in services and meet Level1 criteria during current school year ending in August

Advisor

The Advisor data element allows the SOAP to associate student with a specific advisor. This can help in developing lists for the respective advisor in order to plan and document required work. New advisor entries are added through the Employee Management screen.

Reporting Category

Reporting Category allows you to create a SOAP specific category of students in the event you wish to create specialized lists for reporting purposes; i.e. SummerBridge, PCA, etc.

School

The school field allows the SOAP to associate student with a specific school. The CSAC maintained school table will have a link to district, which will also include a county. This would allow the SOAP to roll up students based on school affiliation to district and county level.

Student Add

1. From the Student Search screen you can click on the Add Student button if you know the student does not already exist. All students added to the system will be verified by First Name, Last Name and Date of Birth. If a student already exists with this combination, you will receive a warning and the student will not be added.

Upon clicking on Add Student you will be presented with the following screen.

As you can see, the Student Demographics data is comprised of many data elements which are all presented in a two tabbed screen (Student and Student Continued). Not all data available in these tabs are required. You only need to populate the data elements preceded by an asterisk to complete the add process.

2. Upon completing the data entry process for all required fields you can click on the Save button to add the new student entry. If additional students need to be added, you can click on the Add button and all previously entered data will be cleared from the screen and the system will be ready to accept new student entries.

Editing Student Demographic Data

1. Editing a student record can be achieved by clicking on the student's name from the Student Management screen data grid results.

The dataset is returned after you have provided valid search criteria and clicked the Search button. From the Student Management screen you can edit any student returned as a search result by clicking on the student name which is highlighted in the left-hand column of the resulting dataset.

Name	DOB	School Name	Grade
TEST TEST	04/01/2014	"Virtual" Pre	
TEST STDID	03/03/2010	Life Learning Academy Charter	
TEST STDID	03/03/2010	Life Learning Academy Charter	

After clicking on the student name for the student you wish to edit, you will be presented with the student demographics tabbed screen. This screen will present to you all of the data captured for the student to date.

2. You may alter any data in either tab. Upon completing your data entry, you simply need to click on the Save button located in either Student tab to complete the edit process.

You can return to the Student Management screen by clicking on the Back button.

Student Term History

Student Term History screen allows SOAP to track GPA, School, and Grade Level for each student over time. The system will not require these items be maintained to advance students in subsequent years. However, if maintaining grade level, school affiliation and GPA over time is not essential, you will need to track that under the student demographic record.   This will ensure that students will be advanced/deactivated as part of the annual advancement process. (MM-Detailed rules still need to be determined)

Level 1 (MM-Technical Implementation needs to be determined: Scheduling, Monitoring)

The Student Term History table is also maintained by internal system processes to track whether a student has been provided the required number of services in an academic year to qualify as "Level 1." On a regular basis, all of a student's activities will be evaluated at the student level to determine if the student is considered Level 1. If it is found that the student has received the required amount of services, an entry will be placed in the Student Term History table with the corresponding term and year. This will help identify when the student became a Level 1 student and over the years, whether the student received the required services in all years they were active with Cal-SOAP.

Adding Student Term History Data

1. Within the Student Demographics tabbed screen, you can add a term history record for the student you have in view by clicking on the History button. Upon clicking the History button you will be presented with the following screen.

Student Term History

STUDENT NAME: MARK MCDONELL

Add Term   Back

2. Click on Add Term button to enter a new entry for the Student Term History.

Student Term History

STUDENT NAME: STDID TEST

Add   **Back**

*Year		*Term	--- SELECT --- ▼
GPA		School ID	▼
Grade Level			

Save   **Cancel**

3. In the screen that appears below the Add button, enter data into all required fields and click on the Save button. If you do not want to add a term history record at this time, you can quit the process by clicking on the Cancel button.

The newly captured data will be saved in the database and will be automatically presented above the Add button. In the example below a record was saved including the school, GPA and grade level for the Spring 2014 school term.

Student Term History

STUDENT NAME: MARK MCDONELL

Year	Term	GPA	School Name	Grade Level	Level1 Flag	Record Type
2014	Spring	3.25	"Virtual" Pre	10		USER

Add   **Back**

The record type field indicates that this record was created manually by a user of the system. A user cannot add multiple records with the same year and term. There is validation that will stop this from occurring. Editing a record for a specific term that already exists is allowed.

Editing Student Term History Data

1. Editing term history data is similar to editing students. From the term history results for a given student, simply click on the term history year data element which represents the year and term to be edited.

Student Term History

STUDENT NAME: ELIAS DIAZ

Year	Term	GPA	School Name	Grade Level	Level1 Flag	Record Type
2013	Fall	3.36	"Virtual" Pre	9		USER
2014	Spring	2.37				USER
2014	Fall	3.24	"Virtual" Pre	10		USER

Add **Back**

*Year	2014	*Term	Fall ▾
GPA	3.24	School ID	"Virtual" Pre ▾
Grade Level	10		

Save **Delete** **Cancel**

In this example above, you are editing the only record available for the particular student. As you can see the year and term correspond to the year and term displayed in the data grid at the top of the screen.

Depending on your role, you can edit the data for the term history by clicking on the Save button after you have made your changes. Your role will also determine if you have the ability to delete the term history record. All roles which have access to the term history screen will be able to view the details in this edit screen, and have the ability to cancel the edit screen view.

2. After making all edits you must click on the Save button.
3. After making your edits of the Student Term History data, you can navigate back to the Student Demographics screen by clicking on the Back button.

You need not click on the Save button in the Student Demographics screen at this time to complete a save process for Student Term History records. All Student Term History records have been saved at this point.

Deleting Student Term History Data

1. Click on the Year data element that corresponds to the year and semester term you want to delete.
2. In the edit screen, click on the Delete button. The record will be deleted from the system and the result grid at the top of the screen will reflect the change.
3. Return to the Student Demographics screen by clicking on the Back button.

Student Contact

Student Contacts screen allows you to maintain all contacts the student may have throughout their time with Cal-SOAP and beyond when they attend college. Along with the various fields you would typically maintain for a student contact, you can also indicate whether a particular contact is an emergency contact. Those contacts flagged as emergency contacts will be indicated as such in the contact search results and are available at first view.

Adding Student Contact Data

Within the Student Demographics tabbed screen, you can add a student contact record for the student you have in view by clicking on the Contact button.

1. Upon clicking the Contact button you will be presented with the following screen.

2. Click on Add button to enter a new entry for the student's contact.

Student Contacts

STUDENT NAME: STDID TEST

Add   Back

*First Name		*Last Name	
*Relationship		Address 1	
Address 2		City	
State	-- SELECT --	Zip	
Email Address		Phone Number	
Emergency Contact		Comments	

Save   Cancel

3. In the screen that appears below the Add button enter data into all required fields and click on the Save button. If you do not want to add a student contact record at this time, you can quit the process by clicking on the Cancel button.

The newly saved data will be saved and will be automatically presented above the Add button. In the example below a record was saved with the data for the student's father, who is an emergency contact for the student.

Student Contacts

STUDENT NAME: STDID TEST

Relationship To Student	First Name	Last Name	Email Address	Phone Number	Is Emergency Contact
FATHER	MICKEY	MOUSE	MICKEY@DISNEY.COM	(555) 555-1212	Y

Add   Back

Editing Student Contact Data

1. Editing student contact data is similar to editing students. From the student contact results for a given student, simply click on the student contact relationship data element.

Student Contacts

STUDENT NAME: STDID TEST

Relationship To Student	First Name	Last Name	Email Address	Phone Number	Is Emergency Contact
FATHER	MICKEY	MOUSE	MICKEY@DISNEY.COM	(555) 555-1212	Y

Add   **Back**

*First Name	MICKEY	*Last Name	MOUSE
*Relationship	FATHER	Address 1	
Address 2		City	
State	CA	Zip	
Email Address	MICKEY@DISNEY.COM	Phone Number	(555) 555-1212
Emergency Contact	✔	Comments	

Save   **Delete**   **Cancel**

In this example above, you are editing the only record available for the particular student. As you can see the relationship corresponds to the dataset at the top of the screen.

Depending on your role, you can edit the data for the student contact by clicking on the Save button after you have made your changes. Your role will also determine if you have the ability to delete the student contact record. All roles which have access to the Student Contact screen will be able to view the details in this edit screen, and have the ability to cancel the edit screen view.

2. After making all edits click on the Save button.
3. Once you have made all your edits to student contact data, you can navigate back to the Student Demographics screen by clicking on the Back button.

You need not click on the Save button in the Student Demographics screen at this time to complete a save process for student contact records. All student contact records have been saved at this point.

Upon completion of any data entry related to the student demographics, you can return to the Student search screen by clicking on the Back button.

Deleting Student Contact Data

1. Click on the Year data element that corresponds to the year and semester term you want to delete.
2. In the edit screen, click on the Delete button. The record will be deleted from the system and the result grid at the top of the screen will reflect the change.
3. Return to the Student Demographics screen by clicking on the Back button.

Student Services

Student Services is comprised of two components; Service Profile and Service Management. Service Profile screens provide the user the ability to define CalSOAP specific, specialized services within the twelve standard activity categories. Service Management provides the user the ability to search, export and create service events using the Service Profiles previously defined. Service events are the interactions between students and advisors on a specific date, which determine the level of service the student received in an academic year. All Service Profiles will roll up to the twelve activities for reporting purposes.

```
⊟ STUDENT SERVICES
      SERVICE PROFILE
      SERVICE MANAGEMENT
```
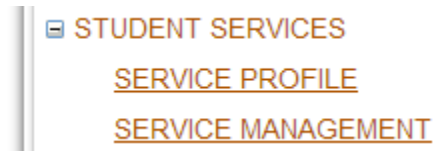
Service Profile

There are two kinds of Service Profiles; General and Intensive. A general Service Profile, when used to create a service event, does not require student level data and is not used to identify the level of service provided to any one individual. An Intensive Service Profile, when used to create a service event, does require you enter the specific students who were part of the event. An intensive service is also defined by the following CSAC categories: Small Group, One-On-One and 4 Hour Plus.

- Small Group – Service event involving up to 10 students
- One-On-One – Service event where there is only one student who participates
- 4 Hour Plus – An event involving a large group of students, which has a duration of 4 hours or more

All students, who take part in intensive Service Profile events, must be documented in the system to account for the effort towards the student's level of service.

Intensive Service Event Valuation

- Small Group – One service event has a point value of 3.
- One-On-One – One service event has a point value of 1.
- 4 Hour Plus – One service event has a point value of 3.

Level of Service Determination for Students Associated with Intensive Service Events

- Level 1 – Students, whose point value is 9 or greater

- General – Students, whose point value is less than 9

When you create a service event for a general Service Profile, you are only required to enter the number of students and parents who participated in the event. Since you are not identifying the specific students, there are no points earned at the student level as with intensive service events.

Adding a Service Profile

Before you can create a service event for any of the twelve activities, you must define a Service Profile. Based on need, you may wish to create multiple Service Profiles for any one activity. You must create at least one Service Profile per activity.

See Appendix 2: Service Profile Concept Diagram for further understanding

1. From the home screen you can begin to Add or Edit Service Profiles by choosing the Service Profile hyperlink under the Student Services section as shown below.
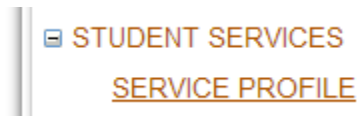
You will be presented the following screen.

The Activity Name dropdown control includes the twelve standard activities common to all Cal-SOAP projects. As you will see, until a Service Profile is added for a given activity, there will be no search results for any of the twelve activities.

2. To begin adding Service Profiles, choose an activity from the Activity Name dropdown and click on Add Service Profile.

In this example, the Academic Counseling activity has been chosen. If you fail to choose an activity, you will be prompted to include that prior to saving the Service Profile.

3. Enter a Service Profile Name, select a Frequency for the service, choose a Service Type (Intensive or General) and enter any Material typically necessary to conduct this service.
4. If you choose to make the service an intensive service type, you will also be required to enter the appropriate CSAC Service Type associated with it. This will be used in determining the point value to associate with any student included in the service event.

In the example below, a service type of intensive was chosen, which required the selection of CSAC Service Type as well. In this example the CSAC Service Type of One-On-One was chosen from the dropdown.

5. At this point you can Save your Service Profile or Cancel the process. If you save this entry, you will see it in the search results for the activity under which it was created.

In the example below, two service profiles have been successfully saved and are displayed in the search results for Academic Counseling.

*Activity Name	ACADEMIC COUNSELING ▼		Search	Reset	Add	Back

Activity Service Name	Frequency	Service Type	CSAC Service Type
TEACHING	DAILY	GENERAL	
MATH CONCEPTS	DAILY	INTENSIVE	ONE-ON-ONE

6. Continue to Add Service Profile records for all the activities necessary for your Cal-SOAP Project.
7. Click on the Back button to return to the Home screen.

Click on the Reset button, if you wish to start from a blank screen. This will not remove service profiles, but simply clear the screen.

Editing a Service Profile

1. Enter the Service Profile screen from the home screen by clicking on the Service Profile hyperlink.
2. Select an activity under which exists the Service Profile you wish to edit and click on the Search button.

In the example below, the search results for the Academic Counseling activity have been shown.

*Activity Name	ACADEMIC COUNSELING ▼		Search	Reset	Add	Back

Activity Service Name	Frequency	Service Type	CSAC Service Type
TEACHING	DAILY	GENERAL	
MATH CONCEPTS	DAILY	INTENSIVE	ONE-ON-ONE

3. Click on the Service Profile Name from the left hand side of the list. This will open the Service Profile in edit mode.

4. Make any changes to the Service Profile and click on the Save button. The ability to edit entries is based on your role, so you may not have this option. You may also click on the Cancel button if you do not wish to make any changes.

Note: You cannot change the service type once the service has been tied to a service event.

5. Click on the Back button to return to the Home screen.

Click on the Reset button, if you wish to start from a blank screen

Deleting a Service Profile

1. Enter the Service Profile screen from the home screen by clicking on the Service Profile hyperlink.
2. Select an activity under which exists the Service Profile you wish to delete and click on the Search button.

In the example below, the search results for the Academic Counseling activity have been shown.

Activity Service Name	Frequency	Service Type	CSAC Service Type
TEACHING	DAILY	GENERAL	
MATH CONCEPTS	DAILY	INTENSIVE	ONE-ON-ONE

3. Click on the Service Profile Name from the left hand side of the list. This will open the Service Profile in edit mode.

Activity Service Name	Frequency	Service Type	CSAC Service Type
TEACHING	DAILY	GENERAL	
MATH CONCEPTS	DAILY	INTENSIVE	ONE-ON-ONE

4. Click on the Delete button and the Service Profile will be deleted. The ability to delete entries is based on your role, so you may not have this option. You may also click on the Cancel button if you do not wish to make any changes.

   Note: You cannot delete a service once the service has been tied to a service event. This is important to maintain data integrity.

5. Click on the Back button to return to the Home screen.

Click on the Reset button, if you wish to start from a blank screen

Service Management

Once you have defined the Service Profiles for each activity you intend to provide, you can access those service profiles when creating service events. Service events document the actual engagement between students and Cal-SOAP staff members. You will create many Service Events for specific Service Profiles throughout the year. After you create a service event, you can view, edit and export the data related to it.

Based on the service profile type (general, intensive) you wish to use to create a service event, there will be varying required data elements. General Service Profiles only require you enter the number of students and/or the number of parents who attended the event along with the service date. Intensive type Service Profiles require you identify the specific students who participated in the service event along with the service date and advisor. There are other optional fields that can be included in any service event including the subject and duration of the event.

Adding Service Events

1. To add a new service event click on the hyperlink on the home screen for Service Management.

SERVICE MANAGEMENT

This will take you to the following screen.

You can either choose to search for service events prior to adding a new one, to insure it does not already exist or simply click on the Add Service button to begin adding the new event. If you wish to search for events already in the system, you can do that by choosing or entering data in the prescribed parameters at the top of the screen and clicking on the Search button. You can learn more about this process under the part of this manual that discusses "Viewing Service Events."

2. Upon clicking on the Add button, you will be taken to the following screen.

Figure 1: General Service Event Add/Edit Screen

3. Begin by choosing and entering the required data as indicated with an asterisk for the type of Service Profile you have chosen. Remember, you will see different required fields for general versus intensive Service Profile types. In figure 1 above, the screen shows the required fields for a general Service Profile type and does not allow you to choose student level data. In figure 2 below, the screen shows the required fields for an intensive Service Profile type.

Figure 2: Intensive Service Event Add/Edit Screen

4. If you are entering an event for a general service and you have completed the required fields, you can simply click on the Save button, and you are done adding a new service event.
5. If you are entering an event for an intensive service profile, once you have entered all the required fields, you must also include the students who participated in the Event. To complete this process, click on the Choose Students button.

This screen is very similar to the Student Search screen and will provide a list of students based on the criteria you choose or enter in the parameters at the top.

6. Once you have successfully searched for students, you can click on the check box for the students you want to add to the service event.
7. Once all the students have been added, you can click on the Select button or Cancel if you do not want to add students at this time. You can perform this task many times to append more students to the service details.
8. Once you have selected all the students who participated in the intensive service event, you can press the Save button. This will create or append the newly selected students to the service event.
9. To add additional service events, you must click on the Add button to reset the screen and begin again. If the list of students is the same for multiple intensive service events, you can create more service events for those same students by changing the required fields, selecting the same students from the Choose Student screen (the same students from your previous search will be available) and pressing the Save button.

Viewing Service Events

1. Viewing service events that you have already entered into the system can be performed in the Service Management screen. You can get to this screen by clicking on Service Management hyperlink on the home screen.

SERVICE MANAGEMENT

2. Select or enter criteria in the controls at the top of the screen and click on the Search button. This will return all services you have entered based on these criteria.

Activity Service Name	Advisor	Service Date	Subject	Service Type	CSAC Service Type
MATH CONCEPTS	ANDRE AGASSI	06/25/2014	ENGLISH	INTENSIVE	ONE-ON-ONE
MATH CONCEPTS	BOUN KHAMNOUANE	06/24/2014	HISTORY	INTENSIVE	ONE-ON-ONE
MATH CONCEPTS	ANDRE AGASSI	06/24/2014	OTHER	INTENSIVE	ONE-ON-ONE
MATH CONCEPTS	ANDRE AGASSI	06/17/2014	ENGLISH	INTENSIVE	ONE-ON-ONE
MATH CONCEPTS	ANDRE AGASSI	06/13/2014	MATH	INTENSIVE	ONE-ON-ONE
MATH CONCEPTS	ANDRE AGASSI	06/11/2014	OTHER	INTENSIVE	ONE-ON-ONE

3. If you wish to view additional details about the services (students for intensive services, duration, etc.) you can do that by clicking on the specific Activity Service Name presented in the screen above. The Service Profile name entries are hyperlinks to the service detail screen below.

Name	Permanent ID	DOB	School Name	Grade Level
DEV256 DEV		04/25/2014	Arthur E. Mills Intermediate	
DEV06/23 DEV	12312123	03/03/2003	"Virtual" Pre	6
MARK MCDONELL	1234567890	05/01/2014	"Virtual" Pre	

Choose Students

Exporting Service Events

1. Follow the instructions for Viewing Service Events presented previously.

2. Once you have the details displayed for the desired service you want to export, click on the Export button at the bottom right of the screen. The service and service detail data will be exported in a .csv file format which can be opened in MS Excel.
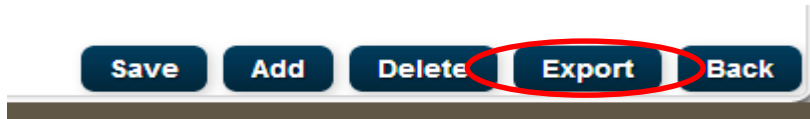
Editing Service Events

1. Follow the instructions for Viewing Service Events presented previously.
2. Once you have the details displayed for the desired service you want to edit, update the data as desired.
3. You can also add more students to intensive type services by clicking on the Choose Student button as you would when creating the service event for the first time.
4. Click on the Save button to save your changes.

You are not able to remove students already associated with a saved service event. If the service includes students who did not participate in the particular service, you must delete the entire service event and create it again. See Deleting Service Events for instructions on how to perform that task.

You are also not allowed to alter the activity or service level descriptions since those are integral in documenting the type of service provided. If either of these fields is not correct, the service record will need to be deleted as expected.

Deleting Service Events

1. Follow the instructions for Viewing Service Events presented previously.
2. Once you have the details displayed for the desired service you want to delete, click on the Delete button on the bottom right side of the screen.

Budget

The Budget module is comprised of four screens; SOAP Detail, Consortium Detail, Budget Activity Link and Budget Detail. The first three screens are supportive in nature and help create the details for the various budget reports (Budget, Reimbursement, Equipment, Pledges & Contributions). The Budget Detail screen is central to creating the many values represented on the actual Budget Report. For example, the Consortium Detail screen allows you to create the records which will be available in the Budget Detail screen dropdown for consortium. The SOAP screen provides you a place to enter your Cal-SOAP details that are shown on the Reimbursement Report.

SOAP Detail

The SOAP Detail screen is an interface designed to allow each Cal-SOAP project to edit information about itself. The information can be helpful to CSAC staff to better understand who they can contact about the system updates, and may be used in various reports.   The SOAP Detail screen will also be the one interface the CSAC Administrator will use to deactivate outdated or create new Cal-SOAP entries. The SOAP entries are vital to the distinction of records throughout the system to insure the data remains separate and confidential to each Cal-SOAP project.

Editing SOAP Details

1. To edit your respective entry simply click on the hyperlink found on the home page shown under the Budget caption.
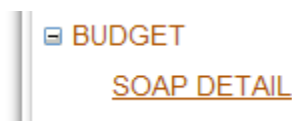
This will bring you to a basic screen that will include your one entry for your respective Cal-SOAP project. Only the CSAC Administrator will have the ability to add new or see all entries.

Name	Project Director	Phone Number	Fiscal Agent
EASTBAY	BALAMURUGAN PARAMASIVAM	(916) 555-1414	OAKLAND HIGH SCHOOL

Back

2. To edit data about your SOAP project, simply click on the Name field hyperlink and the edit screen will open.

Name	Project Director	Phone Number	Fiscal Agent
EASTBAY	BALAMURUGAN PARAMASIVAM	(916) 555-1414	OAKLAND HIGH SCHOOL

Back

*Name	EASTBAY	Address 1	123 SOAP ROAD
Address 2		City	
State	CA	Zip	
Phone Number	(916) 555-1414	Project Director	BALAMURUGAN PARAMASI\
Fiscal Agent	OAKLAND HIGH SCHOOL	Is Active	✔

Save   **Cancel**

3. After you have made your changes, click on the Save button. The newly entered data will now appear in the original grid presented.
4. If you choose not to make any changes, you can simply choose the Cancel button and the edit screen will close.

Consortium Detail

The Consortium Detail screen allows you to enter all the members who provide Matching funds throughout the year. The members you add in this screen will be available in the budget screen where you enter any pledges and contributions you have arranged. You can add or edit these entries anytime throughout the year.

Add and Edit of Consortium Members

1. In order to enter the various consortium member entries, you just need to click on the Consortium Detail hyperlink available under the Budget caption on the home screen.

CONSORTIUM DETAIL

After clicking on this hyperlink, you will be presented with the following screen.

Consortium Name	Contact Name	Contact Phone	Contact Email
EAST BAY CONSORTIUM	SHELDON COOPER	(123) 456-7890	SHELDONCOOPER@BIGBANGTHEORY.COM
EAST BAY ONE	BALAMURUGAN PARAMASIVAM	(123) 456-7890	BALAMURUGAN.PARAMASIVAM@CSAC.CA.GOV

Add   Back

Here you can either add a new consortium member or edit entries that already exist in the grid.

2. To add a new consortium member, click on the Add button. Here you see the Add screen after it has been opened.

*Consortium Name		Address 1	
Address 2		City	
State	-- SELECT --	Zip	
Contact Phone		Contact Email	
Contact Name			

Save   Cancel

3. Enter your desired member data and click on the Save button. If you do not want to make any changes you can click on the Cancel button and close the screen. Once you click Save, the screen will close and your new entry will be visible in the grid.
4. To edit a consortium member entry, simply click on the hyperlink in the name column of the grid of the consortium member you want to edit. This will open the same screen as the add screen, except it will be populated with the respective consortium members data.
5. Click Save to commit your changes to the database or Cancel to close the screen without making any changes.

Budget Activity Linkage

In order to derive a cost per activity the Cal-SOAP system allows you to associate line item details at the budget category reporting level to one or many of the common activities. Once an association is created, each entry for that budget category will have its dollar amount distributed to the various activities for which it was designated by the percentages you entered in these screens.

For a depiction of the various reporting levels offered in the system and how budget category ties to activities, see the following diagram.

See Appendix 7: Cost Per Activity Allocation Diagram

To create these associations and provide the cost per activity in an automated fashion, you need to enter each and every association that you know will be necessary to accurately calculate the cost per activity.

1. Begin by clicking on the hyperlink on the home screen titled Budget Activity Link.

BUDGET ACTIVITY LINK

2. In the subsequent screen, you will be presented with a search screen that requires you select the year and Budget Main Category. Once both of these selection criteria are chosen and you click on the Search button, you will see all the predefined budget categories that exist for the budget main categories.

*Fiscal Year 2014-2015 ▼   *Budget Main Category STAFFING ▼

Search   Reset   Back

Budget Category	Total Percentage
ADMINISTRATIVE	65.5
CONSULTANT AND PROFESSIONAL	99.4
PROGRAM SERVICES STAFF	90
STUDENTS	100
WORK STUDY	0

In the example above, the fiscal year of 2014-2015 and Budget Main Category of "Staffing" was chosen. After clicking on Search the budget categories appear in the grid. The list contains all budget categories for the combination you selected at the top. In the example four of the five categories have been mapped to one or many of the twelve common activities. Only the Students category has been allocated to activities fully as indicated by the 100 in the Total Percentage column of the grid.

If you have never created these associations for a particular year or budget main category, all of the budget category items will show a zero in the Total Percentage column of the grid.

3. To create the associations, just click on the hyperlink for the budget category for which you want to create all of the associations. The example below shows what has been completed in

the system for the Administrative budget category. The title bar in the screen below will describe the budget category you chose to associate with the various activities.

Activities for ADMINISTRATIVE	Percentage
ACADEMIC COUNSELING	30.5
ACADEMIC PREPARATION	30
CAREER COUSELING	5
COLLEGE: MAKING IT HAPPEN	
COLLEGE VISIT	
FAMILY SERVICES	
FINANCIAL AID COUNSELING	

4. Now you can enter the percentages which make sense for the association you want to create. In the example provided, 30.5% of dollars entered under Administrative will be distributed to all service events provided under the activity titled Academic Counseling. You can maintain these associations for the entire fiscal year. These associations will need to be created every new fiscal year or no dollars will be distributed to activities for that year.

When entering the percentages, use whole numbers to indicate a full percentage point. If you want to break down the percentage down to a portion of a percentage point, you can enter percentage values with decimal points. Therefore, an entry like 10.4, will result in .104 of the total dollars entered as line items for a particular budget category being distributed to the associated activity. If you want to allocate 10%, then simply enter 10 without any decimal points.

5. After you have entered the percentages for the activities, click on the Save button. The associations will be committed to the database and the cumulative percentage will show next to the respective budget category. If you do not want to update the association at this time, click on the Cancel button.

| Total Percentage | | Save | Cancel |

Review all Budget Main Categories and their respective budget categories to ensure you allocate all budget categories that are necessary to accurately calculate a cost per activity. You can see where there may be gaps if the total percentage for any budget category is either zero or some value less than 100. It is not expected that all budget categories be associated with activities, nor that they are fully allocated.

6. The Back button will return you to the Home screen.
7. The Reset button can be used to begin your search all over again from a blank screen.

Budget Main Categories and Budget Categories can only be created by adding data values to the Master_Lookup and the Budget_Category tables. This can only be performed by CSAC IT Staff.

Budget Detail

The Budget Detail screen has been designed to allow every budget related line item to be entered using one interface. The objective when entering data in this screen is to provide the details that will populate the various budget reports (Budget, Reimbursement, Equipment, Pledges & Contributions) and contribute to a large extent in calculating the cost per activity in the Activity Report.

To understand the concept of budget in this system you must become familiar with the actual Budget Report. This report is separated by funding source categories, such as Federal and Matching. Under each of the funding source categories it includes two budget categories; Budget Main Category and Budget Category. The Budget Main Categories are bolded in the Budget Report and include descriptions like Staffing, Benefits, Operating, etc. The Budget Categories include descriptions like Administration, Students, Work Study, etcetera, as in the case of the Staffing Budget Main Category.

For a depiction of how the funding sources and budget categories relate, see the following diagram:

Appendix 7: Cost Per Activity Allocation Diagram

Some important nuances of the Budget screen include the notions of Line Item Type and Funding Source.

Line Item Type

The line item type is required for every entry in the Budget screen and determines the subsequent data requirements to create a complete record. The various Line Item Types are described below:

Agreement – This line item type is a single entry for the fiscal year that represents the total dollar amount provided to the individual Cal-SOAP project from the federal or state government. It is represented on the reimbursement report as a single line item and will tie to the total dollar amount of all "Budget" line item type entries for a given fiscal year.

Budget – This line item type represents the initial entries required to report the budget for the fiscal year. These entries give insight into the allocation of the funds provided by a government agency (federal or general fund) out to the many budget categories on the budget report. These entries should only be entered once per year and set the budget for the entire year. The total of all budget line items must tie to the "Agreement" line item amount for a given fiscal year.

Transaction – This line item type represents the expenditures throughout the year that directly tie to the "Budget" line item types. These entries make up the Reimbursement report and also populate the quarterly, aggregated entries on the budget report. These entries represent the expense of budget entries throughout the year.

Pledges – This line item type is very similar to the Budget line item type. It can be considered the allocation of pledges for the year from the consortium members. These entries will populate the first half of the Pledges and Contributions Report and also complete the quarterly, aggregated entries on the budget report related to funds which are the match of the government funds.

Contribution – This line item type represents the expenditures of funds that have been pledged from the consortium members. These entries will populate the second part of the Pledges and Contributions Report as well as provide the quarterly, aggregated entries under the Budget report for matching funds.

Equipment – This line item type provides the user the ability to track expenditures for Equipment that must be provided on the separate Equipment Report. When associated with main budget category of Equipment, these entries will also show up on the Budget report under that main Category. By choosing the line item type of Equipment though, you are guaranteeing that the expense will show up on the separate Equipment Report.

Funding Source

The Funding Source is required for most line items that are entered in the Budget screen. As its name implies, it specifies the source of the funds in the case of credit entries (Budget, Pledges) and debit entries (Transaction, Contribution, Equipment).

The funding source has two categorical levels; Funding Source Category and Funding Source.

See **Appendix 7** for a depiction of these categories and representative data.

The best example of how these levels work deals with the Matching type funding source category. This category represents all matching funds that are pledged by the consortium members. The funding source examples under the "Matching" category are; In-Kind, Restricted In-Kind, Cash, etc. The Funding Source Category and Funding Source nuance is less descriptive for Federal funds, where both levels are represented by the term "federal". The funding sources may be expanded in the future, but this is not necessary at this time. The Funding Source Category names represent the breaks on the front page of the Budget Report, which are sub-totaled separately in the report.

The only entry where the funding source is not required is the "Agreement" line item type. This entry is only reported as a single item on the Reimbursement Report.

The funding source category and therefore the funding sources tie directly to the line item types. When entering data in the Budget screen, a line item type of Budget or Transaction must include a funding source of "Federal". Likewise Pledge and Contribution line item types require funding sources such as "In-Kind", "Cash", etc. This relationship is verified just prior to submission to the database. If you choose an invalid combination the system will warn you and not allow the record to be saved.

See Appendix 3: Allowable Line Item Type to Funding Source Combinations

Note: Equipment line items can be linked to Matching or Government Funding Sources. Also see Appendix 3 for more details about adding line items for Equipment purchases.

Adding Budget Detail Records

1. In order to enter a budget detail record, choose the hyperlink on the home screen titled Budget Detail.

   BUDGET DETAIL

2. In the main Budget Detail screen, click on the Add button to create a new budget record.

After you click the Add button you will be presented with the screen as shown below. The screen can now accept the detailed data required to build a complete budget detail record.

The choice of Line Item Type, Budget Main Category, Budget Category and Funding Source will be as important as the specific details like Amount, Effective Date and Description. Equally important is the

Consortium selection if you are entering Pledge or Contribution line item types. The same goes for entries related to Equipment that must be shown on the separate Equipment Report, and the specialized fields related to the equipment budget record.

3. Now specify the Line Item Type. This will determine how the data will be represented on the budget reports and the required data elements for a complete budget record of that line item type.
4. Choose Funding Source.

Depending on the line item type, you should only choose from the appropriate Funding Source for that type as described in Appendix 3.

5. Then choose a Budget Main Category and Budget Category to ensure you place the entry in the right place on the Budget Report.
6. If the record is related to a Pledge or Contribution, you have the additional requirement of selecting a Consortium member.
7. Enter the Amount, Description and Effective Date and you should be done for most all data you will enter in the Budget Detail screen. The amount field will only accept dollar amounts without any formatting. For example if you wish to enter $1,234.67; you must enter this as 1234.67 only.

Notes:

The "Agreement" line item type has far fewer data requirements. The data requirements for each line item type are designated by an asterisk preceding the field name in the screen.

An Equipment purchase may be associated with an "Equipment" or "Contribution" line item type. If the purchase is made using government funds and you need to be reimbursed through an Equipment Report, use the Equipment line item type. If the purchase is made using Matching funds in the form of Cash, use the Contribution line item type.

Searching Budget Detail Records

1. After entering the Budget Detail screen from the home page choose the fiscal year or specify a date range for the budget records you wish to view and click on the Search button.

If you select a fiscal year and provide a date range in the Effective Start and End Date fields, the fiscal year will take precedence and you will see all records for that year. If you just want to see data related to a date range, do not choose a fiscal year and enter the appropriate date range.

You may also specify a Line Item Type to narrow the search down further.

In the example below, the 2014-2015 fiscal year was selected before searching.

2. To view all the details for any one budget detail record, click on the hyperlink which corresponds to the Line Item Type that represents the record to be viewed in detail. This is indicated by the red circle in the screen shot above.

By clicking on the hyperlink, you will be presented with the budget record details below the search result grid as shown below.

3. Once you are done viewing the record, you can click on the Cancel button to return to the search result grid.

Editing Budget Detail Records

1. Follow the same steps as described for Searching Budget Detail Records previously.
2. Once you have selected the budget record to edit and are viewing the details, you may change any data element and click on the Save button.

The changes will be saved in the database and the detail screen will disappear. You can verify changes by clicking on the line item type hyperlink of the record you just saved and view its details.

Deleting Budget Detail Records

1. Follow the same steps as described for Searching Budget Detail Records previously.
2. Once you have selected the budget record to delete and are viewing the details, you may click on the Delete button to remove the record from the database.

Appendix

Appendix 1 – Cal-SOAP System Conceptual Diagram

Cal-SOAP System Concepts

SOAP (14)

Funding

Consortia
HS, JC,
CSU

Federal
30%

Improve Access to College
Improve Academic Achievement

50 Employees

Employees
- Admin
- Student Staff
- Program Services
- Teachers

Users
System
Access

Students (CA)
- H.S., J.H, Elem.

Low Income
First Generation

Applicants

Level 1

12 Common Activities
- General Services
- Intensive Services

Depending on Activity Involvement
Applicants May Become Level1

Budget
- Budget/Transactions
- Pledges/Contributions
- Equipment
- Agreement

Expenditures Tie to Activities
To Determine Cost per Activity

Reporting
- Budget
- Student
- Activity

Appendix 2 - Service Profile Conceptual Diagram

<u>SOAP Activity Service Concept</u>

Refers to Activity Service Screen of Cal-SOAP System

- Each Cal-SOAP Project can define specific services for each of the twelve common activities.
- You will define the type of service (General, Intensive) to better define services within each activity.
- You can further define the intensive type of service (One-On-One, Small Group, 4+ Hours) to enable accurate Level1 reporting .
- The services you create will define the options the user will have when creating service events in the Service Management screens
- The examples provided in the Services level below are meant to describe the potential relationship that you can create, linked to Advisement (Activity Category) and Financial Aid Counseling (Activity).
- Every Activity requires at least one Service.

Activity Category (2*)
- Advisement
- Academic

Activity (12*)
- General Counseling
- Tutoring
- Financial Aid Counseling
...

Services (Unlimited Services*)
- SAR Workshop – Intensive, 4 Hours
- FAFSA preparation – Intensive, Small Group
- Cash for College - General
- Cal-Grant Promotion - General
...
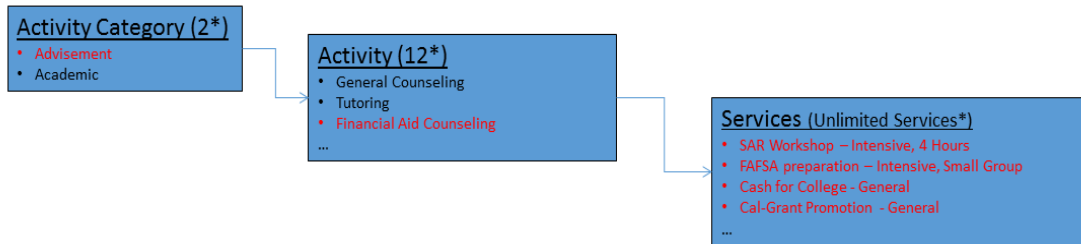
* Refers to the potential number of items at this level.

Appendix 3 – Allowable Line Item Type to Funding Source Combinations

LINE_ITEM_TYPE	FUNDING_SOURCE	TYPE
AGREEMENT	FEDERAL	CREDIT
BUDGET	FEDERAL	CREDIT
CONTRIBUTION	CASH	DEBIT
CONTRIBUTION	IN KIND	DEBIT
CONTRIBUTION	RESTRICTED IN KIND	DEBIT
CONTRIBUTION	WORK STUDY	DEBIT
EQUIPMENT	FEDERAL	DEBIT
PLEDGE	CASH	CREDIT
PLEDGE	IN KIND	CREDIT
PLEDGE	RESTRICTED IN KIND	CREDIT
PLEDGE	WORK STUDY	CREDIT
TRANSACTION	FEDERAL	DEBIT

Notes:

Equipment Purchase

An Equipment purchase may be associated with an "Equipment" or "Contribution" line item type. If the purchase is made using government funds and you need to be reimbursed through an Equipment Report, use the "Equipment" line item type. If the purchase is made using Matching funds in the form of Cash, use the "Contribution" line item type.

The "Equipment" line item type will move the cost/amount you entered under the correct funding source in the Budget Report as well as list the purchase on the separate Equipment Report.

The use of the "Contribution" line item type for an equipment purchase, where there was cash from a consortium member available, will ensure the cost/amount is placed under the correct funding source, but will not include it on a separate Equipment Report.

In both cases, you must selsct the correct Budget Main Category and Budget Category to place the amount under the correct Budget Report categories.

Appendix 4 – Code Tables

Eligibility Type

Code	Description
1	FIRST GENERATION AND LOW INCOME
2	LOW INCOME ONLY
3	FIRST GENERATION ONLY
4	REGIONAL

Ethnicity

Code	Description
163	AFRICAN AMERICAN
164	ASIAN OR PACIFIC ISLANDER
165	CAUCASIAN
166	FILIPINO
167	HISPANIC
168	NATIVE AMERICAN OR ALASKAN NATIVE
169	NO RESPONSE
170	OTHER

Status

Code	Description
5	ACTIVE
6	INACTIVE
7	NEVER ACTIVE – Default value if not indicated in import file.

Language

Code	Description	Code	Description
46	AFGHANI	105	FILIPINO
47	AFRIKAANS	106	FRENCH
48	AMERICAN SIGN LANGUAGE	107	GERMAN
49	AMHIRIC	108	GREEK
50	ARABIC	109	GUJARATI
51	ARAMIC (CHALDEAN)	110	GUJRATI
52	ARMENIAN	111	HAWAIIAN

53	ASIAN	112	HEBREW
54	ASSYRIAN	113	HINDI
55	BENGALI	114	HINDI/PUNJABI
56	BOSNIAN	115	HINDI/URDU
57	BULGARIAN	116	HINOI
58	BURMESE	117	HMONG
59	CAMBODIAN	118	HUNGARIAN
60	CANTONESE	119	HUPA
61	CEBUANO (VISAYAN)	120	ILOCANO
62	CHAOZHOU (CHAOCHOW)	121	INDONESIAN
63	CHINESE	122	ITALIAN
64	CREO	123	JAPANESE
65	CZECH	124	KHMER
66	DUTCH	125	KOREAN
67	ENGLISH	126	LAO
68	ENGLISH/ARABIC	127	LAOTIAN
69	ENGLISH/ARMENIAN	128	LITHUANIAN
70	ENGLISH/CAMBODIAN	129	MANDARIN
71	ENGLISH/CHAM	130	MARSHALLESE
72	ENGLISH/CHINESE	131	MEZTECO
73	ENGLISH/ETHIOPIAN	132	MIEN
74	ENGLISH/FRENCH	133	MOLDAVIAN
75	ENGLISH/GERMAN	134	MONGOLIAN
76	ENGLISH/HINDI	135	OAXACAN
77	ENGLISH/HUNGARIAN	136	OTHER
78	ENGLISH/IGBO	137	PALAUAN
79	ENGLISH/ILOCANO	138	PAMPANGO
80	ENGLISH/ILOCANO	139	PANGALATOK
81	ENGLISH/JAPANESE	140	PASHTO
82	ENGLISH/KHMER	141	PERSHION
83	ENGLISH/KOREAN	142	POLISH
84	ENGLISH/LAOTIAN	143	PORTUGUESE
85	ENGLISH/MANDARIN	144	ROMANIAN
86	ENGLISH/MIEN	145	RUMANIAN
87	ENGLISH/NEPALESE	146	RUSSIAN
88	ENGLISH/POLISH	147	SAMOAN
89	ENGLISH/PORTUGUESE	148	SERBIAN
90	ENGLISH/PUNJABI	149	SERBO CROATIAN
91	ENGLISH/RUSSIAN	150	SERBOCROAT
92	ENGLISH/SAMOAN	151	SIGN LANGUAGE
93	ENGLISH/SWAHILI	152	SPANISH
94	ENGLISH/TAGALOG	153	TAGALOG
95	ENGLISH/THAI	154	THAI

96	ENGLISH/TIGRINYA		155	TIGRINYA
97	ENGLISH/TONGAN		156	TONGAN
98	ENGLISH/TONGAN		157	TURKISH
99	ENGLISH/URDU		158	UKRAINIAN
100	ENGLISH/VIETNAMESE		159	UNKNOWN
101	ENGLISH/VISAYA		160	VIETNAMESE
102	ETHIOPIAN		161	VISAYAN
103	FARSI		162	YUROK
104	FIJIAN			

Appendix 5 – Student Import File Specification

Fixed Width Text File Format

*Indicates a Required Field
() Indicates the field length

Field Name	Field Start Position	Notes
Student_State_ID	1 (16)	
Student _Permanent_ID	17 (16)	Student's Permanent ID from District
Student_SSN	33 (16)	###-##-####
*Student_First_Name	49 (32)	
*Student_Last_Name	81 (32)	
Student_Middle_Initial	113 (1)	
*Student_DOB	114 (10)	01/01/2000
Student_Gender	124 (1)	M/F/O
Student_Home_Address	125 (128)	
Student_Home_Address_Line_2	253 (32)	
Student_Home_City	285 (32)	
Student_Home_State	317 (2)	CA
Student_Home_Zip	319 (16)	#####-####
Student_Mailing_Address	335 (128)	
Student_Mailing_Address_Line_2	463 (32)	
Student_Mailing_City	495 (32)	
Student_Mailing_State	527 (2)	CA
Student_Mailing_Zip	529 (16)	#####-####
Student_Phone_Number	545 (16)	### ###-####
Student_Email_Address	561 (128)	
Student_Ethnicity_ID	689 (3)	Must be Mapped Using the Code Table for Ethnicity
Student_Ethnicity	692 (10)	Used only to provide a description for the Ethnicity indicated by the preceding code. This data will not be used in the actual import.
Student_Eligibility_Type_ID	702 (1)	Must be Mapped Using the Code Table for Eligibility Type
Student_Eligibility_Type	703 (10)	Used only to provide a description for the Eligibility Type indicated by the preceding code. This data will not be used in the actual import.
Student_Grade_Level	713 (2)	1 through 12
Student_GPA	715 (4)	Only two decinal places (ex. 3.34)
*Student_School_ID	719 (8)	ID for the School the student is attending - This is the ID given to the School by CDE.

Expected_Graduation_Year	727 (4)	####
Free_Or_Reduced_Lunch	731 (1)	Y/N
Primary_Language_ID	732 (4)	Must be Mapped Using the Code Table for Language
Primary_Language	736 (10)	Used only to provide a description for the Language indicated by the preceding code. This data will not be used in the actual import.
*Status_ID	746 (1)	Must be Mapped Using the Code Table for Status.

Import Process Notes:

1. The only valid Status_ID values accepted in the import process are;
   a. 5 – Active
   b. 7 – Never Active
2. When sending the Active Status_ID of 5, the Application_Date will be set to the date when the file was processed for initial inserts only.
3. If there is no Status_ID in the file for a student record and it is an initial insert, the system will default to 7 for Never Active.
4. Status_ID has no effect on update records. You cannot alter the status for an existing student record using the student import process.

Duplication

This file import process relies on the availability of the student's permanent ID. This field is central in reducing the possibility of duplication. Although it is not required, relying solely on First Name, Last Name and DOB to identify a unique individual can be problematic when any of these values chage for an individual, as it will create a new record. By including the permanent ID in every file, you can reduce the occurrence of duplicate records, since any change to name or dob will not result in an additional record, but will enable a seamless update of the student data for that permanent ID.

Field Validation

Some fields, if you supply an invalid code, will not be updated and you will receive a warning in the upload process results file. The original value will remain in the database for that record. Those fields include:

Gender, Free or Reduced Lunch, Ethnicity Code, Eligibility Type, Primary Language

Some fields, if you supply an invalid code, the entire file will fail and no data will be processed. Those fields include:

Date of Birth, School ID, Status_ID

Appendix 6 – Creating Import File Manually Using TextPad Text Editor

1. Open your TextPad text editor software as you would open any other application. If you do not have the TextPad text editor you will need to speak to your information technology administrator to arrange for you to have this editor added to your workstation computer.

Depending on where you capture the lists of student data (Microsoft Access or Excel), you will need to open the list in whichever application currently contains the data you want to import.

2. Select a column of data in MS Access or Excel and copy the column.

3. Tab to TextPad text editor.
4. Move the cursor to the desired start location for the data you want to paste based on the Student Import File Specification. The cursor can be moved using Tab or the Space Bar on your keyboard.

Depending on your text editor, you typically can see the exact location where your cursor is resting, which is indicated on the bottom right hand corner of the text editor screen. The following screen shot indicates that the cursor is on the first line in the 25th position.
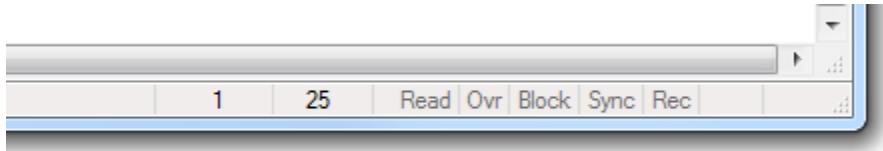
5. Click on the Edit menu at the top of TextPad. Choose Insert and then Paste As Block. This will insert the column of data as a column in the text editor.
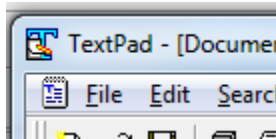
6. Continue to advance the cursor in the text editor to the next position in the file where you want to paste additional data. Once you have pasted all columns of data you have available, choose File from the top menu and save the file.

Appendix 7 – Cost Per Activity Allocation Diagram

Cost Per Activity
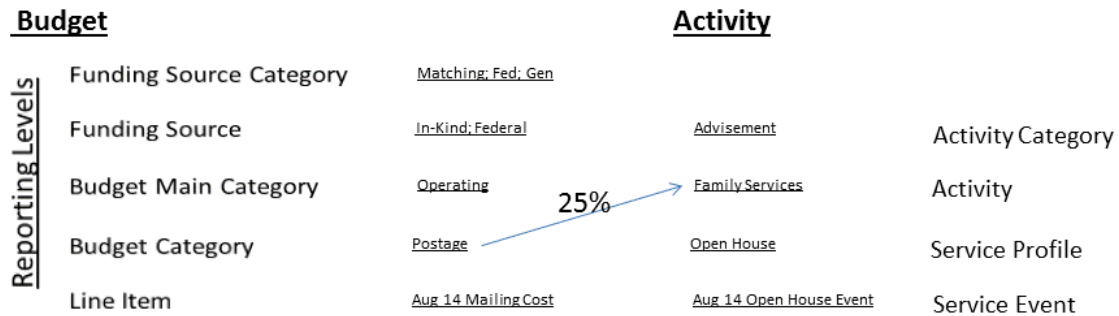
Budget   **Activity**

Cost per Activity is calculated based on the percentage you assign to the association between a Budget Category and one/many of the twelve common Activities. In this example, the budget category of Postage is being associated with the Family Service activity by 25%. Therefore, any line item entered for the budget category of Postage, the dollars in those line items will be distributed to Family Service activities by 25%. Most all budget categories should be allocated to activities and you will likely want to associate 100% of the category dollars to one or many various activities.

Appendix 8 – Screen Navigation Flow

Screen Navigation Flow

Home Screen

Management Screens
- Employee
- User
- Student
- Service

Independent Screens
- Add Detail Screen
- Edit Detail Screen

Basic Screens
- Change Password
- Service Profile
- SOAP
- Consortium Member
- Student Contact
- Student Term History
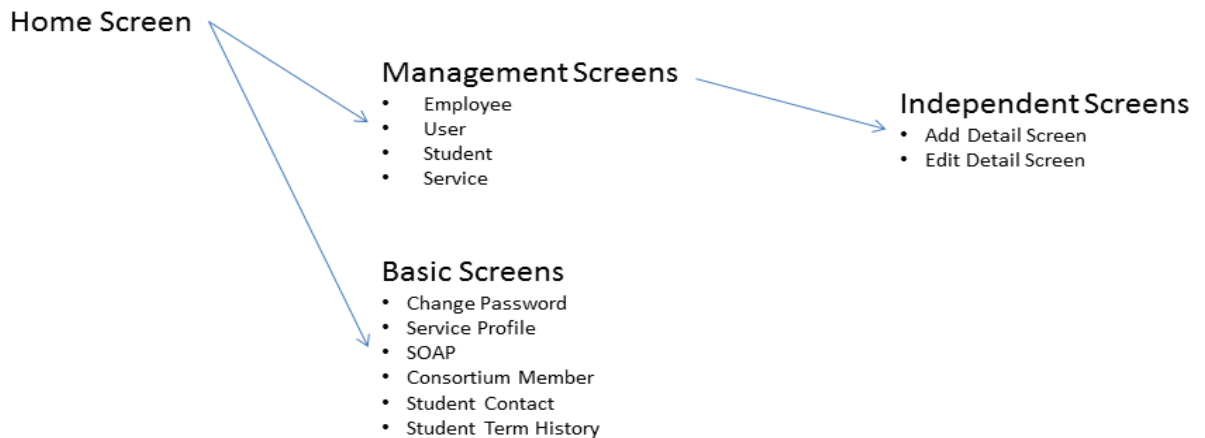
Management Screens provide search capabilities. If you choose to Edit or Add data from the Management screens, you will be brought to additional, independent screens to make those changes. You then must navigate back to the Management screen to return to the Home screen

Basic Screens provide search capabilities. If you choose to Edit or Add data from the basic screens, you will be able to make those changes within the same screen. To return to the Home screen, you must only navigate back once. The items maintained in Basic screens do not require the use of the more complex process provided by the Management screens.

Appendix 9 – Role Permissions

Role Based Security

The Cal-SOAP system supports role based security and is developed with the following roles by default.

- Administrator– CSAC Employees only, who will help administer any Cal-SOAP account, review reports and manage Cal-SOAP project entries.
- Super User – Cal-SOAP role which has full access to the respective system components necessary for a Cal-SOAP to document students, student activities and budget activities. Only Super User accounts can delete data in those screens where this option is available.
- Student Staff User – Cal-SOAP role which has full access to all student related screens.
- Student Staff Viewer – Cal-SOAP role which has limited access to all student related screens. Users who have this role will only have the ability to view student related data.
- Budget User – Cal-SOAP role which gives the user full access to budget related screens.

ROLE	SCREEN	PERMISSION
ADMINISTRATOR	CHANGE PASSWORD	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
ADMINISTRATOR	EMPLOYEE ADD EDIT	ABILITY TO READ (VIEW), AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
ADMINISTRATOR	SOAP DETAIL	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
ADMINISTRATOR	USER ADD EDIT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
ADMINISTRATOR	USER MANAGEMENT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
BUDGET_USER	BUDGET ACTIVITY LINK	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
BUDGET_USER	BUDGET DETAIL	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
BUDGET_USER	CHANGE PASSWORD	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
BUDGET_USER	CONSORTIUM DETAIL	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
BUDGET_USER	EMPLOYEE ADD EDIT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
BUDGET_USER	EMPLOYEE MANAGEMENT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
BUDGET_USER	SOAP DETAIL	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_USER	CHANGE PASSWORD	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
STUDENT_STAFF_USER	EMPLOYEE ADD EDIT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_USER	EMPLOYEE MANAGEMENT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_USER	SERVICE ADD EDIT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_USER	SERVICE MANAGEMENT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_USER	SERVICE PROFILE	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_USER	STUDENT ADD EDIT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN

		OBJECT.
STUDENT_STAFF_USER	STUDENT CONTACT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_USER	STUDENT MANAGEMENT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_USER	STUDENT TERM HISTORY	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
STUDENT_STAFF_VIEWER	CHANGE PASSWORD	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
STUDENT_STAFF_VIEWER	EMPLOYEE MANAGEMENT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	SERVICE ADD EDIT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	SERVICE MANAGEMENT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	SERVICE PROFILE	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	STUDENT ADD EDIT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	STUDENT CONTACT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	STUDENT MANAGEMENT	ABILITY TO READ (VIEW) WITHIN AN OBJECT
STUDENT_STAFF_VIEWER	STUDENT TERM HISTORY	ABILITY TO READ (VIEW) WITHIN AN OBJECT
SUPER_USER	BUDGET ACTIVITY LINK	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	BUDGET DETAIL	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	CHANGE PASSWORD	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	CONSORTIUM DETAIL	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	EMPLOYEE ADD EDIT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	EMPLOYEE MANAGEMENT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	IMPORT STUDENT DATA	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	SERVICE ADD EDIT	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	SERVICE MANAGEMENT	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	SERVICE PROFILE	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	SOAP DETAIL	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	STUDENT ADD EDIT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	STUDENT CONTACT	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	STUDENT MANAGEMENT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.
SUPER_USER	STUDENT TERM HISTORY	ABILITY TO READ (VIEW), WRITE (INSERT, UPDATE) AND DELETE RECORDS WITHIN AN OBJECT.
SUPER_USER	USER ADD EDIT	ABILITY TO READ (VIEW) AND WRITE (INSERT, UPDATE) WITHIN AN OBJECT.