

This document is a writing sample submitted by Caitlyn Johnston.

- The audience this is intended for is non-technical social workers and health coordinators. The management at Nulinx International, Inc. has chosen to adopt a non-standard technical writing style for all manuals, help files and training material to increase their comfort with the database.
- Please note in the child care industry, there are standard terms that normally are considered misspellings, for example:
 - Waitlist
 - Overincome
- This document was originally generated in OpenOffice Writer
- In 2013, Nulinx International decided to remove all Microsoft products from the office computers, opting instead to use **LibreOffice Writer** and **OpenOffice Writer**. Incompatibilities in these software suites include:
 - Disjointed page numbering and section breaks with separate numbering capabilities doesn't work correctly
 - The Table of Contents has a bug where the numbering doesn't work
 - The spell- and grammar-checking features don't work
 - Inconsistent headers
- Despite an ongoing discussion of documentation best practices, Nulinx International, Inc. continues to use non-standard open source office software.

With the correct industry-standard software, none of this is an issue. This is one reason why Caitlyn Johnston is looking for a new position.



Admin's Guide

User Access Rules

Welcome to your COPA database!

- This manual is for Admin and SuperAdmin-level users.
- COPA is designed to be as straight-forward and easy-to-use as possible. Each field is named according to its direct use.

This manual assumes users have a basic knowledge of COPA. If more guidance is needed, please see the **COPA Overview** document.

About This Guide

This guide is designed to help you get started setting up COPA access for your staff. After an initial overview, we take you through an in-depth look at each major functional area of the software. To understand how COPA works, we have devised the following graphics and symbols for this User Guide:

Navigation. Arrows in the text indicate a navigational option. For example, **Child > Data Sheet > Program Information > Additional Information** indicates to go to the Program Information section of the Child Data and scroll down to the Additional Information Section.

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Notes

- A user's access level is defined by the program administrator, called "Admin". Access rights are defined by the Hierarchical Access as well as Job Definition.
- The highest level of access in the database is the "SuperAdmin"; however, the SuperAdmin does not have access to the HR section.
- "Hierarchical Access" refers to a user being given access to view the information on children and their families within one CLASS, One or Multiple SITES, One AGENCY or the entire GRANTEE (all Agencies).
- If a security breach has been suspected, the database can be blocked so only SuperAdmin users can get in and out. To do this, go to **ADMIN > SuperAdmin > School Year End > Block Access to Database**.
- If a user's profile has been changed, s/he must log out and log back in for the changes to take effect.
 - If major changes have been made and Admins wish to force users to log out and log back in, go block the database, then unblock it after 5 minutes.

1. User Profiles vs. HR Staff Profiles

Each employee will have only one HR Staff Profile for all personal, professional and employment information. By way of comparison, a given employee can have as many User Profiles as needed for different levels of access.

For example, a Director might need to access both the Admin configuration settings as well as the HR section, and would therefore have two different use profiles, one SuperAdmin, and one HR manager.

- The HR Manager - like any manager profile in COPA - cannot access the ADMIN section.
- The Admin profile cannot access the HR section, so a person needing both areas would have to have both profiles.
- COPA access is set up this way to ensure strict security of all confidential information.

ADDITIONAL NOTES:

- There are additional settings in **ADMIN > SuperAdmin > Administrative Functions > Activation & Mandatory Controls** that customize what users of various levels can and cannot do. Be sure to double check these settings if a user has trouble with a feature.
- HR Staff Profiles and User Profiles are not related. One type can be deactivated with no effect on the other.
- HR Staff Profiles can be deactivated and re-activated anytime.
- A deactivated user profile cannot be re-activated. A new user profile with a different user name and password would need to be created.
- COPA keeps a list of deactivated user profiles. In **ADMIN > USERS**, the Search page can be filtered for Active, Inactive, or All user profiles.

2 Adding New Users

1. To add new users to COPA, go to **ADMIN > ADD USERS**. The following fields in the New User Information section are mandatory:

New User Information			
Username	<input type="text"/>	Password	<input type="text"/>
User is the same as following staff	<input type="text"/>		
First Name	<input type="text"/>	Last Name	<input type="text"/>
Gender	Male ▾	Title	<input type="text"/>
Phone	<input type="text"/>	Email	<input type="text"/>
Address	<input type="text"/>	City	<input type="text"/>
State	Illinois ▾	Zip Code	<input type="text"/>

- User name
- Password. Note that the combination of user name and password must be unique for each user. For example, if a user has two profiles, they can have the same username, and different passwords, or slightly different usernames and the same password. For more information, please see the Advocates Section.
- The drop-down list "User is the same as following staff" pulls in from the HR Staff Profiles. If this user's name is not on that list, s/he doesn't have an HR staff profile.
- First Name
- Last Name
- Phone Number
- Email Address.

2. In the User Access Privileges section, select the locations this user should be able to access.

- The "ALL (Grantee Level)" level allows the user access to all families, children and volunteers for all agencies, sites and classes in COPA.

User Access Privileges		
Agency	<div> All (Grantee level access) * AVANCE *Sholom CSB_Agency3 EOAC HS - EHS Geraniums Head Start Gleamns HRC Ingenium </div>	Choose multiple agencies by holding down the control key
Site	<div> All Bethel Center Eastview Center North Street Center North Street Children's Center Rochambeau Center </div>	Choose multiple sites by holding down the control key
Class	All ▾	

- If a site is selected, a user can have either:
 - Access to all classes,
 - Or only one class.

- If more than one site is selected, the user will have access to all classes within those sites.
3. Select a Job. This determines what the user can do with the records within her/his access level.
- See the section below titled **Job Descriptions** for full information on the Jobs.

NOTE: "ALL (Grantee Level Access) + Job=Admin " is SUPERADMIN. This is a sensitive role that should be LIMITED to select user only!

Job / Role	HR & Manager	<input type="checkbox"/> Dashboard Admin
Customized Access Profile	Manager Admin Family Advocate Child Advocate Teacher (Limited Access) HR HR & Manager View Only User Search Only User Swipe Card User Auditor & Service Manager Auditor (ONLY) Audit Manager (ONLY) Billing Billing Manager Family	Access Profile
Monitoring and DMR	<input type="radio"/> Auditor <input type="radio"/> Audit Manager <input checked="" type="radio"/> None <input type="checkbox"/> Responsible For Action	<input type="checkbox"/> DMR Access
eDocs	Child <input type="checkbox"/> Family <input type="checkbox"/> Staff <input type="checkbox"/> Volunteer <input type="checkbox"/> Agency <input type="checkbox"/> Site <input type="checkbox"/> Class <input type="checkbox"/> Monitoring Child <input type="checkbox"/> Family <input type="checkbox"/> Staff <input type="checkbox"/> Volunteer <input type="checkbox"/> Agency <input type="checkbox"/> Site <input type="checkbox"/> Class <input type="checkbox"/> Monitoring MB	
Inventory Privileges		
Child & Family Info Edit Restrictions	<input type="checkbox"/> Eligibility Info. <input type="checkbox"/> Eligibility Info. History (Snapshot) <input type="checkbox"/> Program Info. <input type="checkbox"/> Enrollment Info. <input type="checkbox"/> Address & Agricultural Info. History <input type="checkbox"/> Eligibility & Income Info. History (Snapshot) <input type="checkbox"/> PCG Enrollment Info. <input type="checkbox"/> User Defined	

Create User

4. Check boxes. COPA has specialty modules and specialized restrictions in addition to the regular database subscription.
- **Child & Family Info Edit Restrictions:**
 - When the boxes for "Enrollment Info." and "PCG Enrollment Info." are checked, the drop-downs in these Enrollment Information > Activity will be disabled.
 - Similarly, when the boxes for "General Info.", "Eligibility Info." and "Program Info.", etc., are checked, the Pencil Edit icons will not be present.
 - Additional modules include **Monitoring, DMR, eDocs** and **Inventory**. If applicable, check the boxes listed for these modules as they pertain to the user.
 - If these are not visible, your organization has NOT subscribed to them.
 - eDocs, Inventory and Monitoring have their own manuals. However, a given user can have the access in his/her Job expanded to include either Auditor or Audit Manager.
 - Dashboard Admins can customize the Dashboard module for all users. Only three Dashboard Admins are allowed per database.
5. Click CREATE USER.

3. Blocked Users

In **SuperAdmin > Administrative Functions - User Login Control** blocks users out after periods of inactivity. The default is 60 days. The users who cannot get in have been logged out longer than that.

- **Best Practice Tip:** Change the entry of “60” to “365”, and the users who have NOT attempted to login yet will be able to login with no problems.
- For those who HAVE attempted to login and were blocked, this will not work.

To unblock these users:

1. Go to the **ADMIN > USERS > SEARCH USERS** page. In the column, "Login Status", the default setting is “None”.
2. Click on this link until it shows "Authorized" to let them in.

4. Search Engines

In order for a user to find a child, family, volunteer or staff member, the user's access must match or include the other person's location.

- If a family has an enrolled child in the Agency/Site/Class which matches the user access, then they will come up in the "Search Families of Enrolled Children".
- If a family has a wait-listed child whose desired Agency/Site matches a user's access, then the family will come up in the "Search Waiting List".
- If a family has NO children, then ONLY families associated with Agency/Site that match a user's access will come up in the "Search Families Without Children".

5. Job Definitions

A user's job definition further defines the user's access within that user's Hierarchical Access, as the following SIX possible settings. The following do not include the possibility of adding restrictions to the existing levels of access.

- Note that most likely, the “Job” in a COPA user profile is going to be unrelated to the employee's Job Title with the company.

SuperAdmin

This user has the highest level of access, and is created when the Agency is set to “ALL (Grantee Level)”, and the Job is set to “Admin”.

SuperAdmins can access everything in the database, including all the configuration settings, EXCEPT the HR section.

- A Customized Restriction can be set up for a SuperAdmin user to prevent access from a given area.
- Only 10 SuperAdmins are allowed in COPA.
- The only difference in access between a SuperAdmin and an Admin is a SuperAdmin can access all the configuration sections, specifically the SuperAdmin settings and the *COPAMonitoring* Admin settings for the Monitoring module.

Admin

Edit and view access to the information including all admin and SuperAdmin privileges.

NOTES:

- Admins cannot access configuration settings in the SuperAdmin section, or the *COPAMonitoring* Admin section.
- Only Admins can access 900 series of Download Reports.
- Only Admins will have access to the SUPPORT button to submit support tickets. Also, the **Support > Update Document** contains release notes outlining the changes made during the latest quarterly Update.

Manager

Edit and view access to all information (within hierarchical access).

- NO admin and SuperAdmin privileges.
- No archived family/child search, unless in **SuperAdmin > Activation and Mandatory Controls**, the following are checked:
 - Activate 'Search Entire Database' on Child Advanced Search screen
 - Activate 'Search Entire Database' on Family Advanced Search screen

Child and Family Advocates

Advocates are manager-level users, with some restrictions built in.

Family Advocates

Edit and view access to all information (within hierarchical access). Families assigned to the advocate are grouped under Advocate Caseload. No archived family/child search.

- Family Advocates have the same access as Manager.
- Having Family Advocate profile creates the ability for families to be assigned to, and reports to be filtered by, that person.
 - **ENROLLMENT Tab > Assign Advocate > Assign Family Advocate**. The name will appear in the drop-down in the center of the page.
 - Page and Report Filtering. The name will appear on the drop-down and can be selected to list just his/her children.
 - **FAMILY > Family Group Process**.
 - **FAMILY > Family Advocate Case Load**
 - Page and Report Filtering. In Family reports, the Additional Filtering feature in the upper left-hand corner has Advocate parameters.

Child Advocate

Edit and view access to all information (within hierarchical access). Families assigned to the advocate are grouped under Advocate Caseload. No archived family/child search.

- Having Child Advocate profile creates the ability for families to be assigned to, and reports to be filtered by, that person.
 - **ENROLLMENT Tab > Assign Advocate > Assign Child Advocate**. The name will appear in the drop-down in the center of the page.
 - Page and Report Filtering. The name will appear on the drop-down and can be selected to list just his/her children.

- **CHILD > Child Group Process.**
- **CHILD > Child Advocate Caseload.**
- In Child reports, in the Additional Filtering feature in the upper left-hand corner has both Child and Family Advocate parameters.

Combining Advocate Roles

Often an advocate needs both Child Advocate Access and Family Advocate access. S/he will need to access all Family pages for their Family caseload, and all child pages for their Child caseload. However, because of the fundamental restrictions of both of those profiles, the user would have to constantly log in and out, switching between the two profiles. Not only would this be tedious, it would also waste time.

If s/he does not need full managerial access in COPA, a Customized Access Restriction profile can be created and applied to this Manager-level profile, so s/he would have but less than a full manager.

For example, if Martha Jones has both children and families assigned to her, she would have three profiles:

- **Marjo-Ch.** This is her Child Advocate profile to which children will be assigned.
- **Marjo-Fam.** This is her Family Advocate profile to which families will be assigned.

This naming convention keeps all three profiles together in reports, and it's immediately apparent as to why she has three, and which one she logs in with.

- It does not matter which of the two she logs in with. They have the same level of access in terms of child and family information.

CeCe	Jenkins, CeCe	All	All	All	Manager
CeCe-Ch	Jenkins, Cecelia	All	All	All	Child Advocate (Also is an Auditor)
CeCe-Fam	Jenkins, Cecelia	All	All	All	Advocate
COPA AutoMonitor	DO NOT DELETE PLZ	All	All	All	Search Only

Teachers (Limited Access)

Teachers have View access to information within the hierarchical access, with limited edit capabilities for the following attendance and meal count data.

They cannot access archived families or children.

Teachers can only access the following areas:

- **Child Data Sheet** (view only), **Goals, Visits, Child Assessments, Transportation, Emergency, Case Notes** and **Referrals** pages.
- **Family Data Sheet** (view only, except for the **Address & Agricultural Information History (Migrant Families)** section), and all the sub tabs at the top, with edit privileges.
- **AGENCY > Agency > Site > Class links > Children, Attendance** and **Medical** pages.
- **AGENCY Tab > Volunteer Tracking, Community Resources, Professional Development, Staff Directory, My Password, Swipe Card Reader module, Calendar, and Staff Sign-In/Out.**
- **CHILD > Search, Child Navigation, Advanced Search, Assessment Monitoring, and Assessment Assignment** pages.
- **FAMILY > Family Search, Family Navigation, Family Group Process, Advocate Case Load, Advanced Search, Family Member Search, and Assessment Monitoring** pages.
- **ENROLLMENT > Prequalify, Regular Enrollment Application, and Unborn Prenatal Application.**

NOTE: If a teacher needs more access, change the Job to one of the Advocates or Manager. If this is too much access, add a Customized Restriction Profile, so s/he will have more access than a Teacher, but less than a full manager.

6. Specialized Access

There are a variety of specialized user profiles with very limited access in COPA. These are often given to people who should not have access to sensitive information such as contractors and federal auditors.

View Only

View access to information within their hierarchical access. They cannot edit data.

- View Only users cannot see children and parents' social security numbers.
- The **Child Tab > Group Process** is not available to View Only users.
- "View Only" users can access Report 999N (PIR), ONLY if their access level is ALL agencies and sites, which makes them a grantee-level view only user.

Search Only

When this user logs in, s/he will have only a SEARCH Tab, and will only be able to find children and families. To do so, s/he must have the first two letters of either the first or last name, or SSN.

The search results will produce a table with the following columns:

Family Search

- PC Name
- PC SSN
- PC Address
- SC Name
- SSN

Child Search

- Child Name
- Child DOB
- Child SSN
- Status
- Last Enrollment
- Drop Date
- There will be no links by which they can access anything else.

Swipe Card User

When an organization has subscribed to COPA's Swipe Card Module, this user will only have access to the **AGENCY Tab > Swipe Card** page. When a child's ID card with a bar code is scanned, the attendance and meal count is logged in COPA.

See the Swipe ID Card Module document for details.

HR

- Two tabs: HR & Logout.
- Edit and View access to the HR section.
- Even if this user's profile has DMR and Monitoring checked, s/he will not have access to these modules.

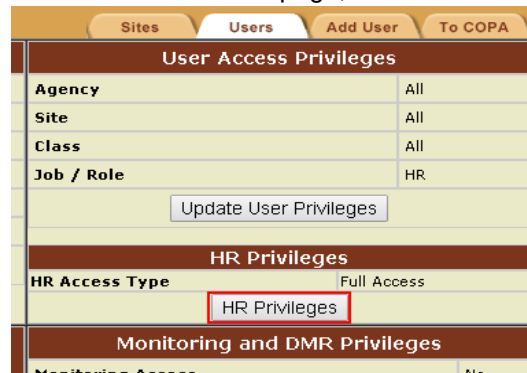
HR & Manager

Edit and View access to the HR section as well as other areas of COPA EXCEPT Admin. Only HR Managers can see 802-HR Smart Report

View Only HR Users

To create a View Only HR user, in **ADMIN > ADD USERS**, create an HR profile, selecting either HR or HR & manager, among the other options.

1. Once saved, go back to this profile and there will be a new HR Privileges section in the page.
2. Click HR PRIVILEGES. On the EDIT page, the radio button can be set to View Only.



View Only HR profiles have the following access:

- ALL sub-tabs: No Pencil Edit Icons will be displayed on top of each page nor on History records.
- Personal Info > "Delete Record" will be hidden.
NOTE: Personal information can be completely hidden from the HR View Only User by going to **SuperAdmin > Activation & Mandatory Controls > Administrative Controls**, and check the box for "Hide Staff Personal Info from HR View Only Users".
- Credentials page: No Pencil Edit Icons will be displayed on "Staff Data User Defined Fields " section
- Absence Info > Disable "Add Record"
- Professional Development Plan > "New Goal" will be hidden.
- Professional Development Plan > View link > Staff Professional Development Plan > No Pencil Edit Icons will be displayed.
- Professional Affiliations > Disable "Add Affiliation" button as well as Pencil Icons.
- Staff Assessment > Delete Last Assessment" will be hidden. Also, editing existing assessments will be disabled as well as submitting new assessment.
- Staff e-Docs: Full access.

Users will then need to log out and log back in to COPA to see the changes in their access.

7. Customized Restriction Profiles

To create customized access restrictions, go to **ADMIN > SuperAdmin > Administrative Functions > Customized Access Restrictions Profile**.

- Note that the Customized Access Restrictions Profile link in the user profile and Add User page go to the same page.
1. To create a new restrictions profile, enter a Profile Name.
 2. Check the boxes for different areas and features to set up restrictions. An Unchecked box means the user WILL HAVE access.

- Remember that the user's Job includes default restrictions, for example, a non-Admin level user will not have the ADMIN tab or any admin functions, so it is not necessary to restrict them from adding or editing Agencies, Sites or Classes, or from the SuperAdmin area. Similarly, a non-HR user does not need to be restricted from accessing the HR sections.
 - When editing an existing profile, for each checked box, the restriction will be listed in the right-hand pane.
3. Click the ADD RESTRICTIONS PROFILE button at the bottom to save the settings.

Users will then need to log out and log back in to COPA to see the changes in their access.

Restrictions for Groups of Users

A Customized Access Restrictions profile can be added to groups of users by going to the ADMIN Tab > USERS Tab > GROUP PROFILE ASSIGNMENT page.

Restricting users to View Only for the following sections of the data sheets can also be done on this page.

- Child General Info.
- Eligibility Info.
- Eligibility Info. History (Snapshot)
- Program Info.
- Enrollment Info.
- Family PCG General Info. (Incl. Buttons and links)
- Address & Agricultural Info. History
- Eligibility & Income Info. History (Snapshot)
- PCG Enrollment

On the **ADMIN Tab > USERS Tab > GROUP PROFILE ASSIGNMENT** page,

1. Filter the page to the desired group of users to whom to apply restrictions.
2. Select a profile from the drop-down. Additionally, hold down the Control key and click on the family and child areas the users should also be restricted from editing.
3. Check the boxes to the left of the usernames.
4. Click the ASSIGN button at the top right-and corner above the table.

Users will then need to log out and log back in to COPA to see the changes in their access.

8. COPA*monitoring* Profiles

Ensure that user profiles are mapped to a staff profile through **ADMIN Tab > USERS Tab > User Profile > UPDATE USER INFO > User** is the same as following staff.

User Profiles

When staff members are given COPA*monitoring* access in their user profiles, their restrictions will not change with the exception that now they have the Monitoring and DMR tabs as well as their previous levels of access.

- To give a user COPA*monitoring* access, go to ADMIN Tab > USERS Tab > User Profile > User Departmental, Monitoring and DMR Access Privileges.
- Only SuperAdmins will have COPA*monitoring* Admin access. Only SuperAdmins have access to the 900-series D/L reports.

- Give each user profile that has *COPAmonitoring* access 20 megabytes of disc space for uploaded files in DMR File Upload Quota.

Auditor

These users will only have access to the DMR, Monitoring and Reports tabs, and nothing else. They cannot edit a Completed Audit Tool.

Audit Manager

These users will only have access to the DMR, Monitoring and Reports tabs, and nothing else. In the Site Summary, they can update the Site Supervisor Verification section.

They cannot:

- Edit any Audit or visit information except tasks assigned to them.
- Create New Site Visits, nor edit Visit Summaries.
- The Audit Manager should be the same person as the site supervisor. S/he can edit Site Verification, but cannot access Audit Instruments. Again, the checklist is the tool for Audit Managers.

Audit & Service Manager

Along with the DMR and Monitoring tabs, the Audit Service Manager can access everything in COPA except:

- The ADMIN Tab,
- S/he can edit Visit Summaries.
- S/he cannot edit Site Verification.

Using these Auditing profiles are required to populate the list of Auditors when a Site Visit is created in **MONITORING > Plan a Visit** and **New Site Visit**. The list of Staff Interviewed is populated from the staff profiles in the HR section.

Note that next to the “Job” drop-down, there are “Auditor” and “Audit Manager” radio buttons. These grant the user either of these levels of functionality in addition to the given “Job”.

- If the Job is set to Auditor, Audit manager or Audit & Service Manager, these radio buttons will be disabled.

Users will then need to log out and log back in to COPA to see the changes in their access.

9. eDocs Access

This is COPA's electronic library. Once an organization subscribes to eDocs, user profiles need to be updated with access to the module.

1. Go to **ADMIN Tab > USERS Tab > Search > User Profile > eDocs Privileges**, about half way down the page.
2. Click **eDOCS PRIVILEGES**.
3. On the eDocs Privileges page, check the boxes of the areas relevant to that user.
 - The Monitoring column pertains to the *COPAmonitoring* module, which is a separate subscription. If your organization does not have *COPAmonitoring*, checking these boxes will have no effect.

Users will then need to log out and log back in to COPA to see the changes in their access.

10. User-Related Reports

There are several reports in COPA to view lists of users and user activity.

ADMIN > USERS > Search

This shows all users in the database, and defaults to only the currently active users. There's a drop-down to show all users, or switch to only deactivated users.

- The headers of the columns are clickable to re-organize the table.
- In the Access Status column, "Normal" means the user is not blocked by either an Admin nor the setting in SuperAdmin > Administrative Functions > User Login Control.
 - **Blocked:** The user is blocked by either by an Admin or the system setting.
 - **Unblocked:** The user was either blocked by an Admin or the system settings, and then unblocked by an Admin.

ADMIN > USERS > Users List

This list is filterable by job and location, and can be downloaded as a spreadsheet.

- This is filterable by status.
- To see SuperAdmins, set the Job to ADMIN and leave the location to All. When the page loads, click on the "Agency" header. The Admins with grantee level access will be at the top. These are the SuperAdmin users.
- User can be listed more than once because a given person will be listed for each User Profile s/he has.

ADMIN > USERS > Group Processing

This page lists both specialized restrictions as well as the ability to grant multiple users access to any additional specialized modules the organization has subscribed to, such as:

- DMR
- Inventory
- eDocs
 - Granting eDocs access via this feature gives them Grantee-level Access to selected user(s) will allow them to access to all the Upload and Directory sections for ALL entities.
 - To reduce this access, edit the **User Profile > eDocs Privileges** section.
- Monitoring

980 – User Activity Report

Under **REPORTS > Organizational Reports**, this report shows with which profiles users have been logging in and out of COPA.

- The date defaults to yesterday and cannot be run for today. This is COPA's only nonreal-time report.
- The **Logout Date** column with a time stamp means the user clicked on the LOGOUT Tab in COPA when s/he was done. If this is blank for a user, it means s/he closed the browser instead.

Other Activity Logs

- SuperAdmin > Data and Activity Log > Deletion Information Log
- SuperAdmin > Data and Activity Log > Activity Log
- CHILD > Enrollment Information – EDIT
- FAMILY > Enrollment Information – EDIT
- ADMIN > (Agency) > (Site) – Edit Class.