

2 Common Features

This chapter includes information regarding common features of the CA program, including:

- System Requirements of the CA Program
- Browser Settings
- Logging into the CA Program
- Closing and Logging out of the CA Program
- Selecting an Academic Year
- Account Links
- Tabs and Screens
- List and Detail Screens
- Locating Records
- Adding Records
- Editing Records
- Deleting Records
- Comments/Notes
- User-Defined Fields

System Requirements of the CA Program

- Internet access is necessary to run the CA program.
- The CA program is compatible with PC and Macintosh computers.

Browser Settings

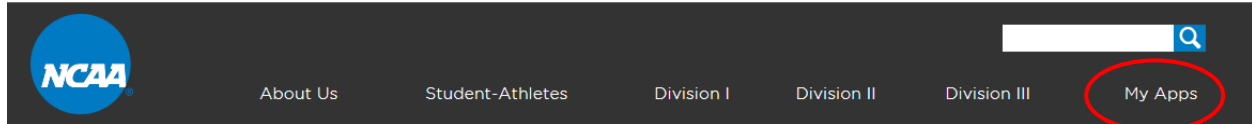
- Users are required to use Internet Explorer, Google Chrome, Firefox or a Safari browser.
- A user is not allowed into the system if the browser does not meet the minimum requirements.
- Announcements on the Main screen of your CA account provide the most up-to-date information on any web browser or system issues.

Logging into the CA Program

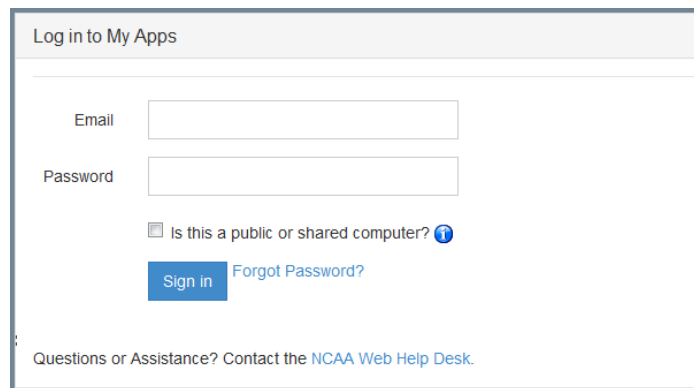
- Access to the CA program is granted to individual users by the member designated single- source sign-on administrator(s).
- Individual users will not see a link to Compliance Assistant until access is granted through the single-source sign-on system via the NCAA Application Authentication Service.

How to Log into the CA Program

1. Go to NCAA.org and click the **"My Apps"** link in the top right-hand corner of the page.



2. Enter email and password on login page and click the **"Sign in"** button.

A screenshot of the 'Log in to My Apps' login page. It features a title bar, an email input field, a password input field, a checkbox for 'Is this a public or shared computer?' with a help icon, a blue 'Sign in' button, and a 'Forgot Password?' link. At the bottom, there is a link to 'Contact the NCAA Web Help Desk'.

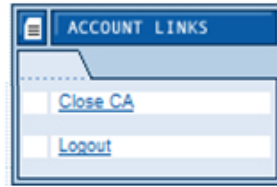
3. Click the **"Compliance Assistant"** link found on the "My Applications" tab.

Closing and Logging Out of the CA Program

- It is important for all users to correctly close or log out of the CA program.
- Users who are logged in but do not use the CA program for 30 minutes will automatically be logged off of the system.
- Closing the CA program will close the CA application only and will not log the user out of the single-source authentication system.
- Users who choose to "Logout" of CA will have to re-authenticate themselves before gaining access to other applications behind the single-source authentication system.

How to Close the CA Program

1. To close the CA program, the user should click the **"Close CA"** link in the Account Links menu on the left side of the screen.



2. A user should not close the program by clicking the "X" in the top, right-hand corner of the program as the user will continue to remain logged in for approximately 30 minutes.
 - If the user was on a student-athlete's record and clicked the "X" to log out, the student-athlete may remain "locked" until the user's time expires after 30 minutes.
 - If other users (or the user who clicked the "X") attempt to access the screen on which the user was working before closing the program, a message may appear stating that the screen is locked. (See the Session Maintenance section of the Tools chapter (Chapter 13) of the user guide for more information regarding how to end an active session.)
3. If a user is logged into the CA program but does not work in the program for a period of 30 consecutive minutes, a warning message will appear indicating that the user will be logged out of the CA program.
4. If the user attempts to use the program after it has automatically logged off, a message will appear at the top of the Sign In screen indicating that "Your session has timed out" and the user will be required to sign in again.
5. If the user selects "Logout" the CA program will close and the user will be logged out of the single-source sign-on system. The user will have to re-authenticate their email and password before being able to access programs protected by the single-source sign-on system.

Selecting an Academic Year

The selection box on the left side of the screen provides access to the different years of data entered into the CA program.



How to Select an Academic Year

1. When entering information into the CA program, the data will be stored in the year that appears in the "Year" field within the selection area.
2. To change the year in which data is to be entered or viewed, pull down from the "Year" drop-down box to select the appropriate year.



Account Links

The "Account Links" box on the left side of the screen provides access to all areas of the program, according to the access granted to a particular user by the system administrator ("manager") of the CA program.



How to Access the Account Links

1. To enter an area within the "Account Links" box, click the underlined option or "link" (e.g., student-athletes).
2. Some of the links (i.e., Administration, Setup, Reporting, Tools) have a plus (+) sign next to the section. This indicates that there are multiple screens within those links.
 - a. When clicking a link with a plus sign (e.g., Reporting), the screens within that area will become available (i.e., Ad Hoc Reporting, Standard Reports).



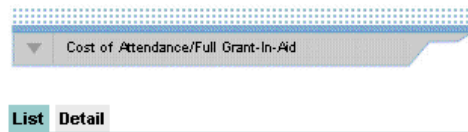
- b. Click the link within the section in which to work (e.g., Standard Reports).
 - c. To hide screens within a particular section, click the main option with the minus (-) sign (e.g., Reporting).
3. Note that if the system administrator ("manager") of the CA program sets a user's access as "None" for a particular screen or section, the account link for that area of the program will not appear in the list.

Tabs and Screens

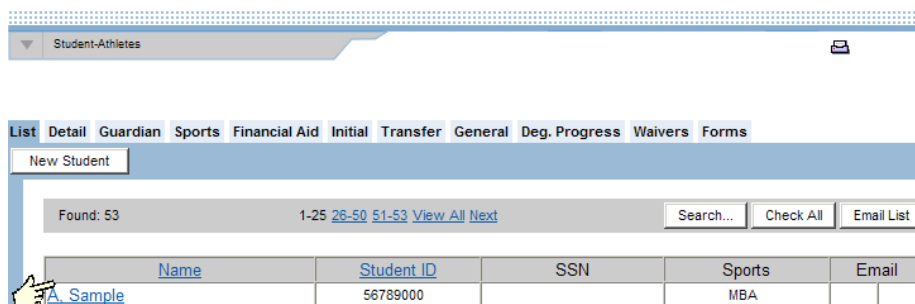
- Tabs allow the user to maneuver among different screens within a particular area of the CA program. **Remember to "Save" the information on screens before switching tabs to preserve the updated information.**
- Tab options differ depending on the area of the program in which the user is working.

How to View Tabs and Screens

1. Click an account link on the left side of the screen to open an area of the program.
2. Most screens within the program have tab options near the top of the screen. Other screens do not require tabs because there are not multiple screens within that area.
3. Most screens have at least a List and Detail tab. (See the following section for a description of the List and Detail screens.)



4. Other screens within the program have multiple tabs, such as the Student-Athletes area, which houses data pertaining to student-athlete information.



5. Note that the user first must click an item on the List screen before being able to access the tabs within the area.

List and Detail Screens

- Most areas within the CA program have a List and Detail tab (other sections have additional screens that track more specific information).
- Depending on the level of access a user has been granted by the system administrator ("manager"), the screens within the program allow users to view and change existing data, and add or delete entries.
- The List screen pictured below is for maintaining financial aid sources information; however, its features are representative of most List screens within the CA program.

How to View the List and Detail Screens

1. The List screen for a particular area opens once the Account Link for that area (e.g., Financial Aid Sources within the Setup area) is clicked.

The screenshot shows a web interface with a navigation bar containing 'List', 'Detail', and 'Setup Questions'. Below the navigation bar is a header for 'New Fund Source'. The main content area displays 'Total Aid: 81' and a pagination link '1-25 26-50 51-75 76-81 All Next'. A table follows with three columns: 'Fund Code', 'Fund Name', and 'Aid Description'. The table contains 20 rows of data, sorted by Fund Name.

Fund Code	Fund Name	Aid Description
HS HON	Acad Hon HS	DI Academic Honor Award - High School
DIAHATRA	Academic Honor Award- Transfer	DI Academic Honor Award - High School
IAS2	Academic Scholarship	DI Institutional Academic Scholarship
IAS1	Academic Scholarship	DI Institutional Academic Scholarship
ATHL	Athletics Grant	Athletics Grant-in-Aid
GIFT	Award from outside agency	DI Financial Aid Not Administered by Institution
BBB	BBBB	DI Institutional Academic Scholarship
COBB	COBB Test	DI Government Grant
CHANCIAS	Chancellors Inst Academic Scholarship	DI Institutional Grant
CHNG	Change Test	Athletics Grant-in-Aid
TEST2009	Compliance Assistant Scholarship	DI Government Grant
CRUSADER	Crusader Scholarship	Athletics Grant-in-Aid
DIACAD	DI Academic Honor Award	DI Academic Honor Award - High School
ACAONTR	DI Academic Honor Award-Transfer	DI Academic Honor Award - Transfer
DI GOV	DI Federal Need-Based Aid	DI Federal Need-Based Aid
DI GO	DI Government Grant	DI Government Grant
N2L	DI Govt 2	DI Government Grant
NIL	DI Govt Grant	DI Government Grant

2. The List screen provides a brief summary of the information entered into the program pertaining to that area (e.g., financial aid sources, student-athlete names).

To sort by columns in the list:

- a. When viewing the List screen, the user may click any underlined column header to sort (alphabetize) all data by that column.
- b. In the example above, the data is sorted by the Fund Name, so the items in that column have been alphabetized.

3. The List screen shows the first 25 items in the list, and includes an index that separates the records into smaller groupings.

Total Aid: 82

1-25 26-50 51-75 76-82 [All](#) [Next](#)

- a. When the mouse is placed over one of the underlined groupings, a "tool tip" appears showing the name of the first and last record within that grouping.
 - b. The total number of records in the complete list is also provided (in the example above, 66 financial aid sources have been entered).
4. The Detail screen is opened after clicking one of the underlined items on the List screen.

The Detail screen shows the specific information about that item.

The screenshot displays the 'Detail' view of a financial aid source. At the top, it shows 'Financial Aid Sources' and 'NCAA University'. The 'Fund Code' is 'ACAD'. The 'Fund Name' is 'DI Honorary Academic Award' and the 'Aid Type' is 'DI Honorary Academic Award/Research Grant'. Below these are fields for 'Fund Comments', 'Default Amount' (\$0.00), 'Default Date' (08/01/2013), and 'Default Period' (FY). A 'Save' button is located at the bottom right.

5. To exit the Detail screen click the List tab, any of the other available tabs on a particular screen, or a link in the Account Link menu.

Locating Records

- There are different ways to locate records within the program, depending on the area of the program being accessed.
- A user may wish to work with a portion of the data by sub-setting the information contained in a list (e.g., student-athletes, athletics personnel). This may be done by using the "Search" button described below.

How to Search for Records

1. On List screens, a variety of methods can be used to find the individual or item. The user may do any of the following:
 - a. Click the links for the different groups of 25 or "All";
 - b. Scroll down through the list;
 - c. Click a different column header to sort the data in an alternative format; or
 - d. Click the "Search" button on the List screen to search for an individual (i.e., student-athletes, prospective student-athletes, athletics personnel);



- The "Search" function in the Student-Athletes Account Link allows users to search for student-athletes by many different options (e.g., Last Name, First Name, Gender, Recruited, Student ID). The user may also filter by sport to see only the student - athletes in that particular sport. Other options from the eligibility area have also been provided to help monitor rules in that area.

Search Criteria

Last Name:

First Name:

Gender: Male Female

Recruited: Yes No

Sport:

Student ID:

SSN:

Initial Enrollment Here:

Temp. Cert. Expires within:

Residence Requirement:

Aid Problem:

Initial/Transfer Problems: Transfer Requirement Clearinghouse Certification
 International Form

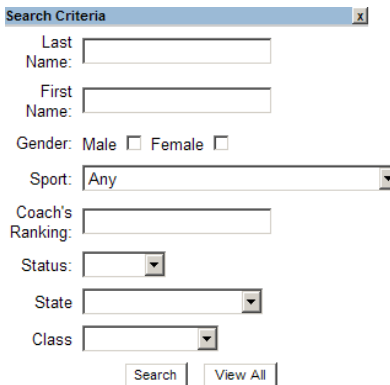
General Eligibility Problems: Fulltime Enrollment Student-Athlete Statement
 Drug-testing consent

Degree Progress Problems: Good Academic Standing Academically Ineligible
 Ineligible Due to Violation Designation of Degree
 Six Hour GPA Rule 40/60/80
 Credit Hour

Transferred Here:

Transferred Away:

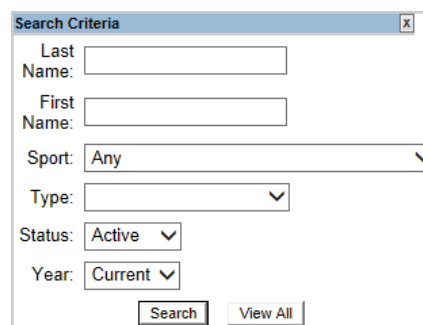
- While a search is active, it will appear that the records within the subset are the only records in the database (e.g., when "List" is chosen, only those within the subset will appear). However, all records are still in the database; they are just unavailable until the "Search" button is chosen again and the criteria is removed from each category (or until the user leaves that section of the program and then returns to the List screen).
- To return to the full list of student-athletes, click the **"Search"** button and then the **"View All"** button.
- The list screen defaults to include only those student-athletes assigned to a sport. If a student-athlete's sport was not designated upon entry, his or her record can only be retrieved by selecting "All" from the drop-down box of the "Sport" field in Search.
- The Search function in the Recruiting area allows users to search for prospective student-athletes (e.g., Last Name, First Name, Gender, Sport and/or Coach's Ranking).



The screenshot shows a web form titled "Search Criteria" with the following fields and controls:

- Last Name:
- First Name:
- Gender: Male Female
- Sport:
- Coach's Ranking:
- Status:
- State:
- Class:
- Buttons: Search, View All

- The search function in the Athletics Personnel area allows users to search for athletics personnel or coaches by Last Name, First Name, Sport and/or Type (of athletics personnel).



The screenshot shows a web form titled "Search Criteria" with the following fields and controls:

- Last Name:
- First Name:
- Sport:
- Type:
- Status:
- Year:
- Buttons: Search, View All

How to Move Among Records

1. When moving off of the List screen, some of the other screens within an area provide arrow buttons near the top of the screen that allow a user to move to the previous or next record.



- a. In the example above, the user may move from Charlie Brown's Detail screen to the Detail screen of the student-athlete before or after him in the list.
 - b. Note that if the "Search" button is used to narrow the list (e.g., by sport), the arrows provide a quick way to move through a desired subsection of individuals.
2. The user also may return to the List screen to select a record from a list of all available records.
 3. The "Search" button described in the section above may also be used to move among records.

Adding Records

- To add records within the CA program, a user must be granted (in the Single-Source Sign-On System) "Update Only" or "Full Access" to the particular screen or section in which information is to be added.
- Most screens within the CA program have a "New" button near the top of that screen to add new records.

How to Add Records

1. Within the Student-Athletes area, a "New Student" button is available on all screens.



- a. To add a new student-athlete in the Student-Athletes area, click the **"New Student"** button.
- b. A Detail screen appears.

- Enter desired information, and note that data fields that are highlighted in yellow are required fields that must be completed to save the screen.
- Click the **"Save"** button. (Note that if the "Save" button is not clicked before leaving the screen, the additions or changes will not be saved.)

2. Within other areas of the program, different methods are used to add records.

- a. In the Recruiting area, most screens (e.g., Telephone Log) have an "Add" button to enter new records.

- b. In the Setup area, some screens (e.g., Administrative Duties) provide a blank field to enter new information (e.g., Job Code and Description).

The screenshot shows a web application interface titled "Administrative Duties Setup". Below the title is a table with three columns: "Job Code", "Description", and "Delete?". The table contains four rows of data, each with a job code, a description, and a checkbox in the "Delete?" column. Below the table is a "Save" button.

Job Code	Description	Delete?
ADM	Administrative Assistant	<input type="checkbox"/>
ALUM	Alumni Manager	<input type="checkbox"/>
DOF	Director of Football Operations	<input type="checkbox"/>
TIX	Ticket Manager	<input type="checkbox"/>

- c. On all screens, to save the addition of information, the user must click the **"Save"** button before exiting the screen.

Editing Records

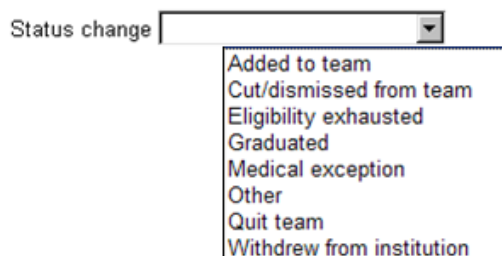
- To edit records within the CA program, a user must be granted (in the Single-Source Sign-On System) "Update Only" or "Full Access" to the particular screen or section in which information is to be edited.
- An "Edit" button is not necessary to edit information within the CA program.

How to Edit Records

1. To change data in an existing record, locate the record to be changed (see the "Locating Records" section above).
2. Once on the desired screen, the user may change any of the data for that record by moving to the appropriate field and typing or selecting the new value. For example, the user may do one of the following:
 - a. Place the cursor in the desired field and type.

Status change date

- b. Highlight the appropriate response from a pull-down box.



- c. Click in a box (or radio button) to add or remove a check mark (or dot).

Noncounter certification on file Yes No N/A

3. To save the edit, the user must click the **"Save"** button before exiting the screen.



Deleting Records

- To delete records within the CA program, a user must be granted (in the Single-Source Sign-On System) "Full Access" to the particular screen or section in which information is to be deleted.
- Most screens within the CA program have a "Delete" button near the top of that screen (or a "Delete" button next to a row of data) to initiate the deletion of records.

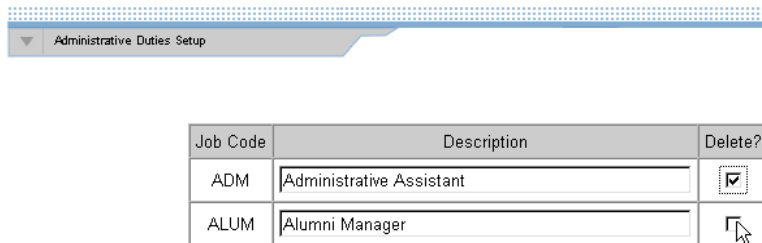
How to Delete Records

WARNING: Deleting records should only be used as a last resort. The CA program provides other options to effectively make records inactive (e.g., see Student-Athlete General Chapter for more information on "How to Delete a Student-Athlete from a sport.")

1. To delete an existing record, the user must first locate the record to be removed (see the "Locating a Record" section).
2. Within the Student-Athletes area, a "Delete Student" button is available on all screens within that area other than the List screen.



- a. To delete a student-athlete in the Student-Athletes area, click the "**Delete Student**" button.
 - b. A message will appear asking "Are you sure you want to delete this record?"
 - Click the "**OK**" button to delete the student-athlete.
 - Click the "**Cancel**" button to keep the student-athlete.
 - c. The student-athlete will be deleted from the program and will no longer appear in the student-athlete list for any academic year.
3. Within other areas of the program, "Delete" check boxes are provided to remove records.
 - a. In the Setup area, the Administrative Duties screen provides a "Delete" check box to remove a Job Code that has been created.



Job Code	Description	Delete?
ADM	Administrative Assistant	<input checked="" type="checkbox"/>
ALUM	Alumni Manager	<input type="checkbox"/>

- b. To delete information using a "Delete" check box, click the box in the "**Delete**" column next to the line of data to be removed.
- c. Click the "**Save**" button to remove the information.
 - A warning message to confirm that the data should be deleted will not appear with these types of deletions. Because deletions are permanent, the user should ensure that the information should be deleted before clicking the "**Save**" button.
 - If the "**Save**" button is not clicked before leaving the screen, the information will not be deleted.

Comments/Notes

- "Comments" (or "Notes") fields are available on most screens within the CA program.
- "Comments" and "Notes" fields provide the user with additional flexibility to track information that is important to the user but that is not already tracked by the CA program.

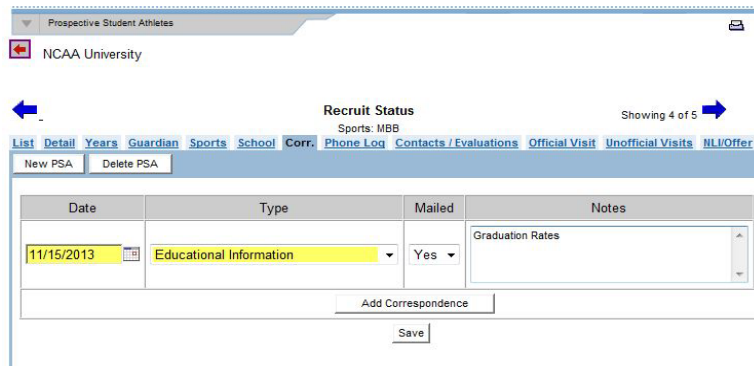
How to Enter Comments/Notes

1. In the Student-Athletes area, the "Comments" or "Notes" fields are large boxes that allow as much free-form text as necessary.



A screenshot of a large, empty text input field with a vertical scrollbar on the right side. The word "Comments" is written in a small font to the left of the field.

2. In the Recruiting area, the "Notes" fields are associated with each line of data within a particular screen (e.g., Correspondence).



A screenshot of a web application interface for "Prospective Student Athletes" at an "NCAA University". The page title is "Recruit Status" for "Sports: MBB", showing "4 of 5" records. A navigation menu includes "List", "Detail", "Years", "Guardian", "Sports", "School", "Corr.", "Phone Log", "Contacts / Evaluations", "Official Visits", "Unofficial Visits", and "NLI/Offer". Below the menu are buttons for "New PSA" and "Delete PSA". The main content is a table with the following structure:

Date	Type	Mailed	Notes
11/15/2013	Educational Information	Yes	Graduation Rates

Below the table are buttons for "Add Correspondence" and "Save".

3. Place the cursor in the "**Comments**" or "**Notes**" field and enter the desired text.
4. While editing notes, a user may right-click on the text area to open a menu of options that may be useful, including options to cut, copy, paste or delete information.
5. Click the "**Save**" button.

User-Defined Fields

- User-defined fields are fields that the user creates to track information that is not already being captured by the CA program. User-defined fields allow increased flexibility in tailoring the CA program to the needs of the institution.
- User-defined fields are created in the Setup area by clicking "**User-Defined Fields**" in the Account Links menu on the left side of the screen (for additional information on user-defined fields see Chapter 4, Setup Information).

Table	Description
Administrative Duties	This will appear on the Athletics Personnel Administrative Duties tab.
Coach General	This will appear on the main tab of Athletics Personnel.
Coach Sport(s)	This will appear on the Coaching Duties tab of Athletics Personnel.
Prospective Student Athlete General	This will appear on the prospective student athlete page.
Prospective Student Athlete Guardian	This will appear on the Guardian tab of the recruiting module.
Prospective Student Athlete NLI	This will appear on the NLI tab of the Recruiting module.
Prospective Student Athlete Visit	This will appear on the Official and Unofficial Visit tabs of recruiting.
Student Athlete Aid Limits	This will appear on the Financial Aid tab of the student athlete.
Student Athlete Continuing Eligibility	This will appear on the Satisfactory Progress tab.
Student Athlete General	This will appear on the main page of Student Maintenance
Student Athlete General Eligibility	This will appear on the general eligibility page.
Student Athlete Initial Eligibility	This will appear on the initial eligibility page.
Student Athlete Parent Guardian	This will appear on the parent guardian page.
Student Athlete Previous Enrollment	This will appear on the Student Athlete Previous Enrollment page.
Student Athlete Sport	This will appear on the Sports tab of the student.
Student Athlete Transfer	This will appear on the transfer page.

Up to 20 user-defined fields may be created for each of the related tables (e.g., "Prospective Student-Athlete General") in the Setup area. In the screen shot below, two user-defined fields (i.e., "HEIGHT" and "WEIGHT") have been added to appear on the Detail screen in the Student-Athlete area.

Prospective Student Athlete General

List Find Field Detail

Field 1 HEIGHT Required?
 Yes No

Field 2 WEIGHT Yes No

The user-defined fields that have been created in the Setup area then appear on the designated screens (usually near the bottom of the screen) of the CA program (e.g., Prospective Student-Athlete Detail screen).

HEIGHT

WEIGHT

How to Enter Information in the User-Defined Field

1. After a user-defined field has been added in the Setup area, the user may go to the screen in which the field is to be tracked (e.g., Student-Athlete Detail).
2. Scroll down the screen to find the user-defined field(s) in which information is to be entered.
3. Place the cursor in the field and type (up to 30 characters) the information to be tracked.
4. Click the **"Save"** button.

How to Remove Information in the User-Defined Field

1. Go to the screen in which the user-defined information is to be removed.
2. Place the cursor in the user-defined field and highlight the information typed in that field.
3. Press the "**Delete**" key on the keyboard.
4. Click the "**Save**" button.