CVC Exchange:
Administrator Dashboard Guide

Administrator Dashboard Guide

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Accessing the Dashboard

In order to access the Exchange Admin Dashboard, you must have an Administrator (Admin) account.

The URL you need to log into your account is located here: search.cvc.edu.

Note: If you need an Administrator account, please email support@cvc.edu.

Once you log in, you can find the link to your Profile in the upper right corner.

Administrator Dashboard Overview

The Admin Dashboard is divided into four areas:

1. **Settings**
   a. Accounts: Manage Admin users and permissions
   b. Create User: Create and set Admin users
   c. Log History: Display of actions taken by an Admin user
2. **Cross Registration Management**
   a. Enrollments: Report that identifies all successful and attempted enrollments and registrations through the Exchange
3. **Course Management**
   a. Exchange Courses: Panel in which administrators can hide courses or make them visible
   b. Sections: Panel in which administrators can hide sections or make them visible
   c. Session Management: Panel in which administrators will configure sessions
4. **Course Search Reports**
   a. Saved Exchange Courses: Aggregate report of courses students users have saved
   b. Saved Searches: Report of searches that students have saved to their dashboard
   c. Top Searches: Display of the most common searches that students have performed

The Admin Dashboard is straightforward and contains explanations for each area, as well as tooltips that help to identify particular terms. Items of note include:

Settings

Accounts

Note: The "Account" module and "Create User" module can only be seen by a user possessing the "Account Manager" attribute tag.

In the CVC Exchange, there are two Admin roles possible for accounts:
1. District Admins
2. Campus Admins

Both Campus Admins and District admins can have one or some of the following attributes listed below— it should be noted that the main difference between a Campus and District admin refers to the scope of what institutions they are able to adjust. Attributes define specific permissions within the scope of the administrator's role. Any combination of attributes can be applied to a single administrator's account. The attributes listed below pertain to the CVC Exchange:

- Financial Aid Director: Receives email notification when home institution student requests federal financial aid.
- Home Institution Approver: Can approve home institution registrations when the Home Institution Approval feature flag is enabled (Not applicable to CVC Exchange)
- Teaching Institution Approver: Can approve teaching institution registrations when the Teaching Institution Approval feature flag is enabled. (Not applicable to CVC Exchange)
- Person Match Administrator: Can review potential person matches as the teaching institution administrator.
- Prerequisite Administrator: Can review registration requests for courses with prerequisites when the Prerequisite Approval Workflow feature flag is enabled.
- Registration Approvals: Can review, approve or deny application requests for off the street registrations. (Not applicable to CVC Exchange)
- Admissions & Records: Users with this permission can review (approve/deny) residency at the Home College for student applications. They may also send notifications to students.
- Platform Configuration Manager: Can create and edit tuition policies within the Self-Service Configuration Portal.

In the "Account" section, admins can search through, create, view, edit, and delete other admin accounts. If the user is a district or campus admin, then they will need to have the "Account Manager" account tag. This can be toggled by another individual with the "Account Manager" tag within the user edit screen.

To create a new account, click "Create User" at the top of the page.

To edit an existing account, click "View" and then "Edit User".

Alternatively, you may also click "Create User" on the main page to navigate to the user creation page.

From this page, you can add and remove permissions simply by checking the appropriate boxes and saving.

In Log History, Admins can see the history of actions that have been taken by students and other administrators.

Log History

Displays a record of all actions taken by Exchange, District and Campus administrators. For example, when an administrator creates a new user account, hides a course section or overrides an error to force a student enrollment, the actions are logged here

CVC Exchange Student Enrollment Details Report

This report displays the details for all applications.

Filter Enrollments

Date from	Date to	Home College	Teaching College
yyyy-mm-dd	yyyy-mm-dd	All	All

Enrollment / Application Status ❓	Changed in Validation	Updated Residency Value	Student / course name
All	All	All	Search by student or course

Student email	Session		
Search by student email	All	Filter Clear filters	

Cross Registration Management

The Enrollment Attempts Report displays the details of the attempted or successful enrollment through the Exchange.

Should you need more information on a particular student, you can click on 'Details' and obtain more specific student information. Downloading the report will also yield additional information pertaining to the TC SIS ID and HC FICE Code.

Glossary of Terms: Enrollment/Application Status

The following terms are utilized on the CVC Exchange to indicate Enrollment Status; the Enrollment Attempts Report can be filtered to select whichever status you would like to view. Note: there will be Enrollment Status terms in the filter that are not currently in use for the CVC Exchange, the items below reflect what is in use.

- AER Form Submitted: Student completed and submitted abbreviated enrollment form.
- Consent Given: Student agreed to consent statements.
- Created: The student authenticated into the Exchange but did not proceed any further.
- Drop Failed: Student's attempt to drop from the teaching course has failed
- Dropped: Student has been dropped from teaching course.
- Eligible Pending Approval (If Enabled): The student provided consent and contact information, but is not yet registered to the course. Will require manual action to process.
- Eligible: The student authenticated into the Exchange, filled out the AER, but did not submit.
- Enrollment Failed: The student has not been successfully enrolled to the Teaching College.
- Ineligible: This status has multiple meanings a) the Canvas account cannot be located for the student at their Home College; b) the student's CCCID cannot be located on their SIS record; c) the student self-identifies as a Special Admit student (Adult Ed, Dual Enrollment, or International F-1 Visa)
- Pending Drop (If Enabled): Student has requested to drop the course, and is waiting on administrator approval.
- Prerequisite Denied: Student has been denied registration at the Teaching College.
- Prerequisite Pending Review: Student has been enrolled at the Teaching College but is pending course registration approval due to course prerequisites.
- Registered and Pending Validation: Student was successfully registered into the Teaching College and is pending residency validation at the Home College.
- Registration Failed: The student was successfully enrolled to the Teaching College, but the registration into the class failed.
- Validated & Registered: Student was successfully registered into the Teaching College.

A Note on Eligibility

Application records are marked 'ineligible' under several different circumstances, which occur

at different points in the process:

1. If a student self-reports as K-12, adult learner, or an international student on the AER form, they will be marked as ineligible. This means they are not eligible to cross-enroll through CVC.
2. If, after AER form submission, if a student does not have a home college canvas account or if a home college canvas account cannot be sourced, they will display as ineligible.

Person Match

If you are a campus admin and have the attribute 'Person Match Administrator' attribute, you will be able to make decisions about potential student records matches in your system. This is to prevent the creation of duplicate student records.

If this feature is turned on for your college/district and the student in your SIS does not have a CCCID on their record, a secondary search match will be performed on the student's a) first name; b) last name; and c) date of birth.

If there is a potential match in your SIS for the student, the student will be notified in the user interface that their application is under review and will be notified by email following review. The Person Match Administrator will also receive an automated email indicating that a potential match exists and a manual intervention needs to be taken on the Admin Dashboard. If no match is determined, the Person Match Administrator can create a new record.

In the Admin Dashboard, navigate to the Cross Registration Management screen, and identify the student(s) for whom Person Match is pending or filter all "Pending Person Match" under the Enrollment/Application Status dropdown menu.

When the Person Match Administrator clicks on "Match Student", they will see the following and be able to make a decision:

CVC Exchange Student Enrollment Details Report

This report displays the details for all applications.

Filter Enrollments

Date from	Date to	Home College	Teaching College
yyyy-mm-dd	yyyy-mm-dd	All ⌄	All ⌄

Enrollment / Application Status ❓	Changed in Validation	Updated Residency Value	Student / course name
Pending person match ⌄	All ⌄	All ⌄	Search by student or course

Student email	Session		
Search by student email	All ⌄	**Filter**	**Clear filters**

1 Enrollment Found   ⬇ Download CSV

STATUS	STUDENT	CREATED	RESIDENCY INFO	TEACHING COURSE	HOME COLLEGE	TEACHING COLLEGE	VIEW
Pending person match	**Angel, Wendy** sbcc7@quottlyinc.com **ID:** ZQSBC007 **SIS ID:** N0005325	2022-11-01 09:29:13 PDT	2022-11-01 - Y -	**ENGL102 - Critical Thinking And Li...** 3.0 Units - Fall 2022	Santa Barbara City College	Glendale Community College	**Details | Match Student**

If no match is found or if the student record is updated, the process moves forward to create the student record and process the registration. The student will then receive an email when the process has been completed.

Student Registration Details

Home College Student ID: ZQSBC007   **Term:** Fall 2022

Application Information (Pending person match)

The following student has attempted to register for **Critical Thinking And Literary Analysis** at **Glendale Community College** and has been flagged as a potential person match. Please review the Student information from enrollment below and provide action as to use an existing person record in your student information system or create a new person record.

> ⚠ You can proceed by updating the student ID or creating a new user

Update teaching college Student Id

Student information from enrollment:

Name: Wendy Angel
Sex: -
Address: 1070 Innovation Way, Sunnyvale, 94089
Email: sbcc7@quottlyinc.com
Phone: -

Students with potential matches.

SELECT STUDENT ID OR ADD STUDENT ID
○ 10116336
○ Enter the new student id

Use Existing Person & Enroll/Register

Create a new User (skip the student match)

Create New Person & Enroll/Register

Financial Aid

Students are able to request to use Financial Aid through the platform, after they have paid for the course. A student checks the 'I want to use Financial Aid' box and that triggers an automated email to the Home College administrator with the 'Financial Aid' attribute. The Financial Aid administrator can then proceed with their own process to determine eligibility and next steps.

Managing Prerequisites

If you are a campus admin and have the attribute 'Prerequisite Administrator' you will approve prerequisites through a set workflow.

When a student attempts to register for a section with a prerequisite, they will be enrolled at the Teaching College but the registration will be put on hold pending clearance of the prerequisite. The campus administrator at the Teaching College will receive an email indicating that the student would like to register; they will proceed to the Admin Dashboard and the 'Enrollments' section. There, they can filter for the Enrollment Status "Prerequisite Pending Review".

CVC Exchange Student Enrollment Details Report

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Filter Enrollments

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yyyy-mm-dd	yyyy-mm-dd	All	All

Enrollment / Application Status ❓	Changed in Validation	Updated Residency Value	Student / course name
Prerequisite pending review	All	All	Search by student or course

Student email	Session		
Search by student email	All	**Filter** Clear filters	

8 Enrollments Found   📄 Download CSV

STATUS	STUDENT	CREATED	RESIDENCY INFO	TEACHING COURSE	HOME COLLEGE	TEACHING COLLEGE	VIEW
Prerequisite pending review	Test100, Ventura vent100@quottyinc.com **ID:** VENT100 **SIS ID:** VENT10082	2022-06-03 10:57:42 PDT	2022-06-03 - Y -	MATH1090 - Trigonometry 3.0 Units - Fall 2022	Ventura College	Banner Sandbox	Details

The campus administrator will click on 'Student Details' and review the unofficial transcript and the identified course that meets the prerequisite. If the prerequisite is approved, the administrator will need to remove any restriction in the campus SIS and then approve the prerequisite on the CVC Admin Dashboard. If approval is not given, then the administrator will mark the student as ineligible in the CVC Admin Dashboard. When the administrator has completed their response in the Admin Dashboard and, if appropriate, in their SIS, the

registration process will continue and the student will be notified of their registration into the course.

Student Enrollment Details
This report displays the details of the student enrollment.

Student / Enrollment Information

Test100, Ventura   vent100@quottyinc.com   CCCID: VENT100
Home College SIS ID: VENT10082   Teaching College SIS ID: N00050880

Residency Information
Original date reported - Value: 2022-06-03 10:58:30 PDT - Y
Updated date reported - Value: -

Creation date	Enrollment date
2022-06-03 10:57:42 PDT	2022-06-03 10:58:34 PDT

Paid through Exchange	Financial Aid requested
No	No

Enrollment status
Prerequisite pending review

Prerequisite upload
📄 Test Document 2.pdf (no virus found)

Comparable Prerequisite Courses
MATH 123

[Approve student Prerequisites]

[Mark Student as ineligible]

Teaching College Course & Section

Banner Sandbox
MATH1090 - Trigonometry   3.0 credits

Term Fall 2022

CRN: 10062

Section Start Date: August 1 2022

Section End Date: December 23 2022

Professor(s): James Flanagan

Tuition Policy

Administrators can use the Self-Service Configuration Portal to update their college tuition policy. Changes to the tuition policy should be configured on the Exchange prior to the open enrollment date for that term (either Summer or Fall).

For the non-resident rate, please enter the total sum amount per unit. The remaining hours/units will be automatically calculated.

enrollment fee + tuition + capital outlay (if applicable)

As a reminder, this is a per course rate. The number of total hours/units will not be calculated should your district policy have a modified rate (e.g. 6> units).

Warning: Any changes to the non-resident policy require a confirmation of the resident policy. Please re-enter the resident tuition policy to $46 per hour/unit (or $31 per hour if quarter college) so both policies are confirmed with a green check.

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New Tuition Policy

Information

University

Banner Sandbox ⌄

Residency

Non-resident ⌄

Session

Fall 2023 ⌄

Prices

Per hour price

361

automatically set the cost for all the below cost fields, doing *price* * *n hours*. **Requires SAVE**

Cost for 0 hours

0.0

Cost for 1 hours

361.0

Cost for 2 hours

722.0

Cost for 3 hours

1083.0

Fall 2023 Available for Cross Registration searches

✓ **Resident Policy** - Created | ✓ Cost data entered	| ⊕ Edit Tuition Policy
✓ **Non Resident Policy** - Created | ✓ Cost data entered	| ⊕ Edit Tuition Policy

Course Management

There are three items associated with this section: Exchange Courses, Sections, and Session Management. Please note: a fourth section, Requirements, is not currently in use for CVC.

Courses

Exchange Courses will include *any* course that has been listed on the Exchange. If there are no open sections for a particular session/time period, the course and corresponding section would not appear in search results.

Sections

This report lists all sections (not just active sections) available in the Exchange, showing course title, date & time, Teaching College, instructor name, units and visibility. You can filter a search by campus, course name, or session.

Colleges can use this report to hide a section from their course list, if needed. When sections are available, they would appear here in a way similar to the Courses view, above.

District Admins can see reports showing all course sections in their district.; Campus Admins can see reports showing all course sections at their campus.

Session Management

The Session Management configuration within the Quottly Admin Dashboard allows individual institutions full control over individual session settings. This includes:

- Inventory Import Start Date - the first date course inventory should be imported into the exchange for each session.
- Registration Open Date - date courses within each session will be available for registration.
- Start Date - Term start date and last day courses will be available for registration.
- End Date - Term end date and last day nightly imports will run for that term.
- Census Date 1 - Last day course can be dropped without a W on the students transcript.
- Census Date 2 - Last day course can be dropped with a W on the students transcript.
- Session Code - Student Information System session code that should be used for integration requests. (ie: 2020FA or 202007)

Access to the Session Management configuration is only available within the Quottly Admin Panel for all administrators with no specific account attribute (e.g. Financial Aid, Admissions & Records).

Session creation is completed automatically within the platform for the next 4-terms. Session names cannot be updated as they are universal for all institutions.

Session Management Tasks

Configure and Import
Each session at minimum requires a Session Code to be input.
This can be completed by:

1. Accessing CVC Admin Dashboard
2. Under Course Management, select Session Management
3. Under Actions, select Edit *(if code is not set, you can also select Add Code under the Code column)*
4. Set configurations
5. Select Save Information

Import
Course inventory imports can be triggered by two methods:

1. Automatically - if Inventory Import Start Date is set for the session, this will trigger an automated nightly import starting that date.
2. Manually - if Inventory Import Start Date is not set for the session, you must manually trigger the first import. Following the first import, course inventory import will run automatically on a nightly basis. In order to manually import:
   a. Accessing Quottly Admin Panel

      b. Under Course Management, select Session Management

      c. Under Actions, select Edit *(session code must be set prior to importing course inventory)*

      d. Under Actions, select Import Sections
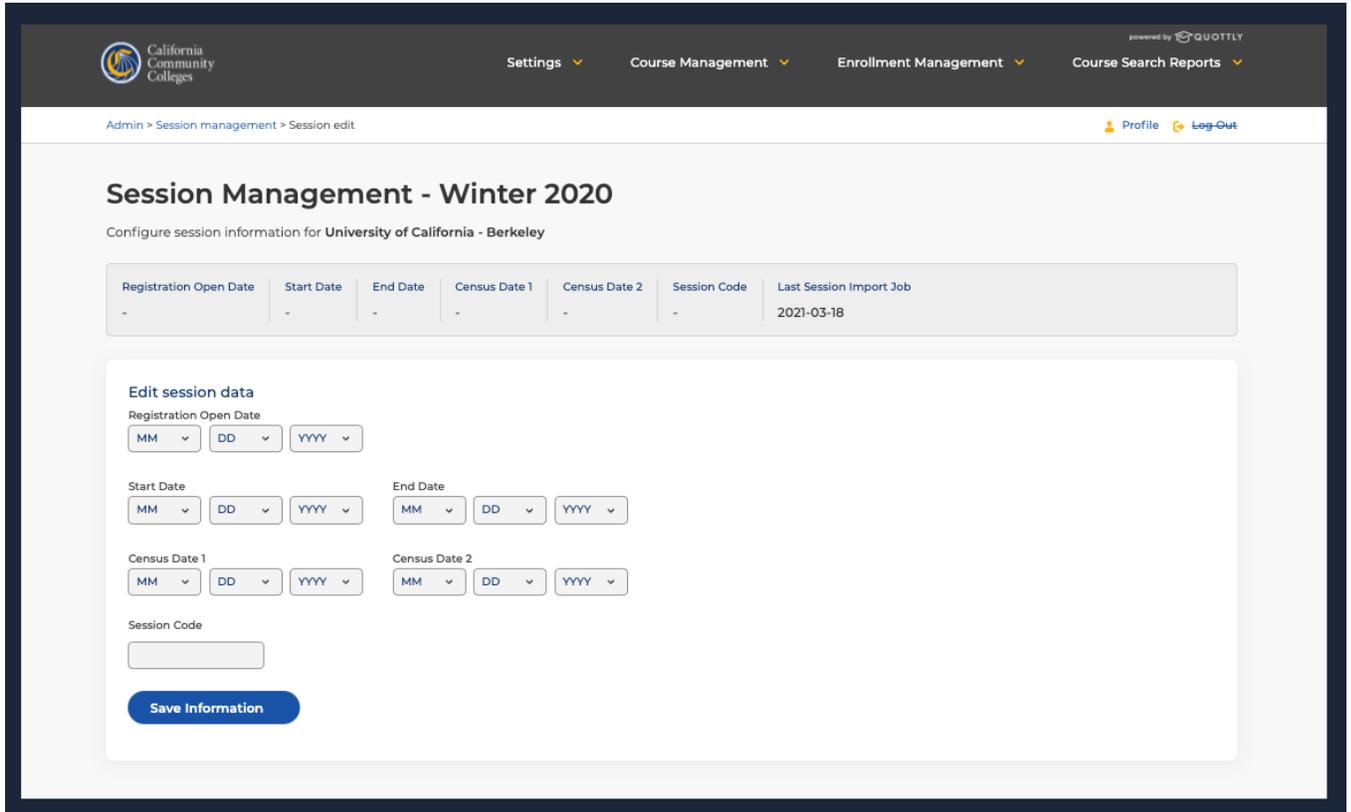
Course Search Reports

This section provides insight into student searches, items that they have saved and the top search terms for your Exchange.

Saved Exchange Courses

Saved Exchange Courses are those that students have saved to their Exchange account. If you are a campus administrator, this report will reflect your students only.

Saved Searches

This report shows courses or general education requirements that students have searched for and saved. You can filter to see the searches saved by students from a particular district/campus.

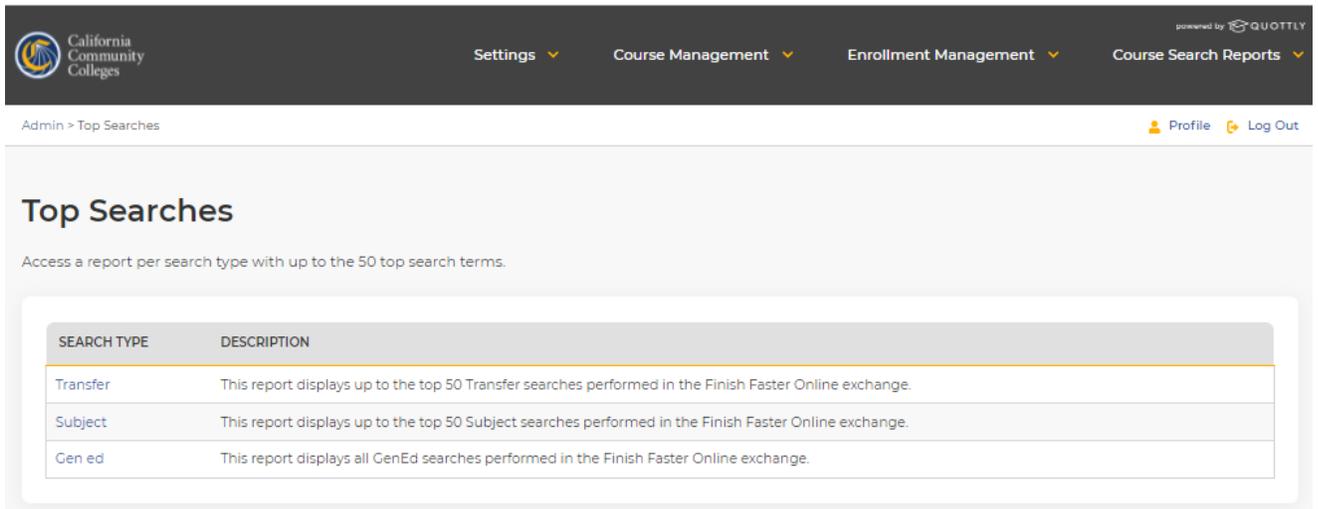## Top Searches

This report outlines by search type the top 50 searches on the CVC exchange.

Transfer is equivalent to a Course Name search

Subject is equivalent to a Keyword search

Gen Ed includes searches conducted using IGETC or CSU Breadth.

Additional Resources

If you are logged in as an Admin, a chat button will appear on the bottom right. This is a live chat with a Quottly Customer Experience specialist. You can also reach out to CVC directly at at support@cvc.edu.

Document Version

Version No.	Change Made By:	Section or Page Number:	Changes Made:
8/9/2022	Jennifer Atkinson		Original Document
10/31/2022	AJ Sorensen	Page 4 Page 12	Glossary of terms updated ; added note for CSV download information Changes to session management section
11/7/2022	Donna Miranda & Amanda Mason	Page 6	A note on eligibility added
11/9/2022	AJ Sorensen	Page 5	Added eligible and made minor text edits to glossary
12/6/2022	AJ Sorensen	Pages 2-4	Added information regarding various attributes and the Account module
2/16/2023	AJ Sorensen	Page 4	Added Admissions and Records permissions information.
9/8/2023	Donna Miranda	Page 11-12	Included tuition policy instructions.