



# Interfase

**Co-OP MODULE ADDENDUM**

Revised May 2010

*advanced solutions for career services offices*



# Interfase Co-op Module Addendum

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## CONVENTIONS

The following conventions are used in this manual:

CSO represents CSO Research, Inc.

WWW represents the World Wide Web

URLs and email addresses are printed in blue and underlined.

## LICENSING

With your office's signature on a new Interfase contract including the co-op module or a signature on a co-op module addendum to an existing contract, you are granted an annually renewable, nonexclusive, non transferable license to use the Interfase software. Refer to your purchase agreement for more details

## SUPPORT

Every attempt has been made to make this documentation complete. If questions or problems do arise, you can get technical support from CSO Research, Inc.

CSO Research, Inc.  
P.O. Box 340819  
Austin, TX 78734  
(866) 705-4201 (toll free); Press 1 for Support  
[support@csoresearch.com](mailto:support@csoresearch.com)

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# Support Information

For complete information on available support services please visit <http://www.csoresearch.com/support>.

There are three main options for obtaining support for Interfase. The CSO Research services team is available Monday through Friday from 8am to 6pm CT

- LIVE CHAT: To access the Live Chat service, please visit <http://www.csoresearch.com/support>, go to the Live Chat section and click the Live Chat button
- EMAIL: [support@csoresearch.com](mailto:support@csoresearch.com)
- PHONE: 1-866-705-4201 (Toll Free). Press "1" for support.

## Support Help Menu

As an Administrator you will have access to the Help menu option. You will find the Help menu in the main menu of your Interfase system. Clicking on this menu will load the CSO Support website and display the Support Information. All support options are listed there for your convenience.

The screenshot shows the CSO Support website. At the top, there is a navigation bar with the CSO logo on the left and 'Interfase Training' on the right. Below this is a secondary navigation bar with links: Home, My Profile, Databases, Tools, Help, and Sign Out. The 'Help' link is circled in red, and a red arrow points from it down to the 'Support' section of the main content area. The 'Support' section has a header with the CSO logo and a navigation menu: SOLUTIONS, COMPANY, NEWS & EVENTS, SUPPORT, CONTACT US. Below the header, the word 'Support' is written in a large font. The main content area contains text about the CSO services team, a list of support options (Online Documentation, Live Chat), and a 'LEARN MORE' button next to a photo of a woman at a computer.

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# CO-OP MODULE

## What is the co-op module?

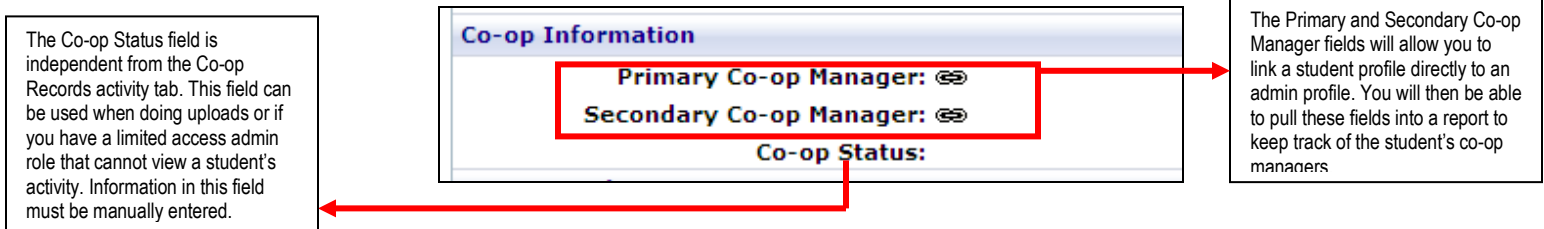
The co-op module is an additional Interface component that allows administrators to manage co-op student timelines and any associated position information. In this addendum we will cover setting up a co-op timeline, as well as how to link the timeline to the employer that the student will be working for.

NOTE: Schools that use the co-op module may or may not use the placement activity tab. Information in the Placement tab will not be linked to information in the Co-op Records tab.

## STUDENT PROFILE AND ACTIVITY

### CO-OP INFORMATION SECTION

For the co-op module, there will be a new section added to the student's profile called the Co-op Information Section. This section will allow you to link the student to their co-op manager and keep track of their current co-op status.



### CO-OP RECORDS ACTIVITY TAB

To view the student's co-op timeline go to the Student Profile and click on View Activity under Page Functions on the left, and then click on the Co-op Records tab.



Student Search > Student Profile > Activity

Quick Search >  
 Pending v  
 Last Viewed v  
 Quick Links v

**Co-op Records for Student "Betty Davis"**

0 Referrals | 0 Placements | 0 Schedules | 0 Mentors | **4 Co-op Records** | 0 Event Registrations | 4 Observations  
 1 Survey Responses | 0 Appointments | 0 Job Agents | **4 Co-op Records** | 27 Audits

[Add To Timeline]

<< 1 >> Page 1 of 1, items 1 to 4 of 4

Co-op Term	Co-op Type	Work Term Number	Description	Action
<input type="checkbox"/> 2009, Fall	At Work	1	Employer: Olin Corporation Contact: Angie Standefer Job: Engineering/Business Trainee	View Remove
<input type="checkbox"/> 2010, Winter	At School	1		View Remove
<input type="checkbox"/> 2010, Spring	At School	2		View Remove
<input type="checkbox"/> 2010, Summer	At Work	2	Employer: Olin Corporation Contact: Angie Standefer Job: Engineering/Business Trainee	View Remove

<< 1 >> Page 1 of 1, items 1 to 4 of 4

Assign

### CREATING A STUDENT'S CO-OP TIMELINE AS AN ADMIN

To create the student's co-op timeline you will click on the Co-op Records tab in activity and then click on "Add to Timeline".

2 Referrals | 1 Placements | 0 Schedules | 0 Mentors | 0 Event Registrations | 22 Observations  
 0 Survey Responses | 0 Appointments | 0 Job Agents | **5 Co-op Records** | 2 Audits

[Add To Timeline]

<< 1 >> Page 1 of 1, items 0 to 0 of 0

Co-op Term	Co-op Type	Work Term Number	Description	Action
No records to display.				

<< 1 >> Page 1 of 1, items 0 to 0 of 0

Assign

STEP ONE: Select what term the student's co-op timeline should start in.

Add to Timeline

**Add To Timeline**

Select Starting Term: [Select] v  
 Timeline: [Select] v  
 2009, Fall  
 2010, Winter  
 2010, Spring  
 2010, Summer

Create Close

STEP TWO: Select if the student will be at work, at school, etc. until the term that they will be graduating. Then click the Create button. If for a specific term you do not know where the student will be you can leave it at “Do not create”.

STEP THREE: If you know what company and job the student will have, assign this to their timeline.

Co-op Term	Co-op Type	Work Term Number	Description	Action
<input checked="" type="checkbox"/> 2009, Fall	At School	1		View Remove
<input type="checkbox"/> 2010, Winter	At Work	1		View Remove
<input type="checkbox"/> 2010, Spring	At School	2		View Remove
<input type="checkbox"/> 2010, Summer	At Work	2		View Remove
<input type="checkbox"/> 2010, Fall	At Work	3		View Remove
<input type="checkbox"/> 2011, Winter	Parallel (Both)			View Remove
<input type="checkbox"/> 2011, Spring	At School	3		View Remove
<input type="checkbox"/> 2011, Summer	At School	4		View Remove
<input type="checkbox"/> 2011, Fall	At Work	4		View Remove
<input type="checkbox"/> 2012, Winter	At Work	5		View Remove

Work Term Number counts the number of terms the student is at work or at school. This number is automatically generated when you first create the co-op timeline. If you make changes or add to the timeline you will have to manually change these numbers as this is only a text field in the record.

Check the term that you want to start the assignment with and then click the Assign button.

After clicking the assign button you will be able to search for the employer and job that the student will be working with and link it to their co-op timeline.

Job ID	Job Title	Organization Name	Colleges	Action
8	Physical Ed/ Drivers Ed Teacher, K-12	Austin ISD	Professional	[Link]
9	Social Studies Teacher, Grades 7-12	Austin ISD	Professional	[Link]
11	Elementary Teacher, Grades 3+4(One Position)	Austin ISD	Professional	[Link]

Select if you want the job to be assigned to only the record that you selected or to the record you selected and all following records.

Enter the job title and/or the organization name and then click Search.

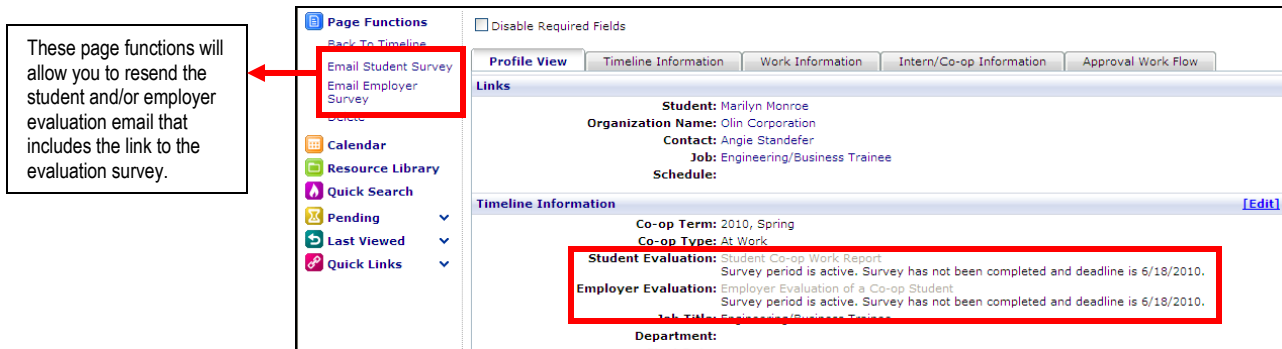
After selecting the job the system will fill in the information for the selected records and all following records if that option was selected.

NOTE: If you select to assign the current record plus records following the information will automatically be added to all of the following terms. If the student changes jobs you will be able to re-assign those terms. This also means that if a term is changed from "At School" to "At Work" it will already be assigned to the appropriate position.



Co-op Term	Co-op Type	Work Term Number	Description	Action
<input type="checkbox"/> 2009, Fall	At Work	1	Employer: Olin Corporation Contact: Angie Standefer Job: Engineering/Business Trainee	View Remove
<input type="checkbox"/> 2010, Winter	At School	1		View Remove
<input type="checkbox"/> 2010, Spring	At School	2		View Remove
<input type="checkbox"/> 2010, Summer	At Work	2	Employer: Olin Corporation Contact: Angie Standefer Job: Engineering/Business Trainee	View Remove

Viewing co-op record before evaluation survey is completed:



These page functions will allow you to resend the student and/or employer evaluation email that includes the link to the evaluation survey.

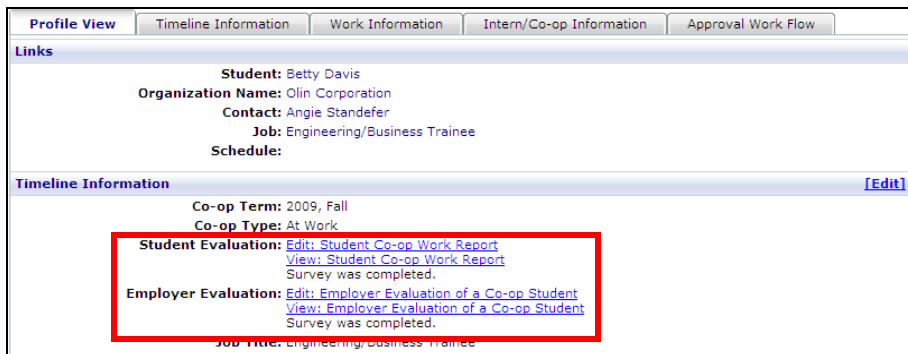
- Email Student Survey
- Email Employer Survey

**Student Evaluation:** Student Co-op Work Report  
Survey period is active. Survey has not been completed and deadline is 6/18/2010.

**Employer Evaluation:** Employer Evaluation of a Co-op Student  
Survey period is active. Survey has not been completed and deadline is 6/18/2010.

NOTE: Student Surveys will not be emailed out if there is not an Employer linked to the co-op record.

Viewing co-op record after evaluation survey is completed:



**Student Evaluation:** [Edit: Student Co-op Work Report](#)  
[View: Student Co-op Work Report](#)  
Survey was completed.

**Employer Evaluation:** [Edit: Employer Evaluation of a Co-op Student](#)  
[View: Employer Evaluation of a Co-op Student](#)  
Survey was completed.



## STEP FOUR: Set up the Approval Work Flow.

The Approval Work Flow will allow you to send the student co-op record to different approvers for them to fill in and approve sections of the co-op record using an external view of the record.

NOTE: This step is not mandatory and can be removed if your office does not want to approve the co-op record within the system.

Step	Deadline Date	Approver	Email Definition
Step 1:	5/4/2010	Contact	<input checked="" type="radio"/> Co-op Timeline Contact <input type="radio"/> Co-op Timeline Supervisor
Step 2:	5/6/2010	Faculty	<input checked="" type="radio"/> Student Faculty Advisor
Step 3:	5/12/2010	Other 1	dyoung@university.edu (e-mail address) Department Head (description)
Step 4:	5/14/2010	Other 2	bsmith@university.edu (e-mail address) College Dean (description)
Step 5:	5/19/2010	Student	<input checked="" type="radio"/> Student Email
Step 6:	5/26/2010	Administrator	<input checked="" type="radio"/> Student Primary Co-op Manager <input type="radio"/> Student Secondary Co-op Manager

\*If you plan to use “Other 1” or “Other 2” in your Work Flow Approval Process you will need to set up these roles and their permission. See the New Role Setup under the “Co-op Module Setup” section.

\*\*If you plan to use “Contact” in your Work Flow Approval Process and select to use the “Co-op Timeline Supervisor” you will need to set up a new role and set the permissions. See the New Role Setup under the “Co-op Module Setup” section.

After you have filled in the Approval Work Flow you can initiate it by going to the Approval Work Flow section under the Profile View tab and clicking the “Initiate Approval Process” link.

This field will automatically change to "Yes" after all steps in the Approval Work Flow have been approved.

Approval Work Flow						
<a href="#">[Initiate Approval Process]</a> <a href="#">[Edit]</a>						
Work Flow Initiated: No Work Flow Complete: No						
Status	Deadline	Viewed	Action Taken	Approver	Email	Initials
Pending	5/4/2010			Contact	jean@csoresearch.com	
Pending	5/6/2010			Faculty	chris@csoresearch.com	

Once the approval process has been initiated the email will go out to the person in Step 1 of the Approval Work Flow. After the person in Step 1 approves the co-op record the email will be automatically sent to the person in Step 2. If one of the people decides to reject the co-op record or they miss their deadline the approval process will stop until an admin has resolved the issue.

After the approval process has been initiated you will have the option to delete approvers, approve the co-op for them and re-send the email to the approver.

The screenshot shows the 'Approval Work Flow' configuration page. It has tabs for Profile View, Report A Co-op/Intern Hire, Timeline Information, Work Information, and Intern/Co-op Information. The 'Documentation' tab is active, showing 'Approval Work Flow'. There are 'Save' and 'Cancel' buttons at the top. The configuration is divided into three steps:

- Step 1:**
  - Deadline Date: 4/16/2010
  - Approver: Faculty
  - Email Definition: Student Faculty Advisor
  - Options:  Delete, [Approve](#), [Resend E-mail](#)
- Step 2:**
  - Deadline Date: 4/20/2010
  - Approver: Contact
  - Email Definition: Co-op Timeline Contact (selected), Co-op Timeline Supervisor
  - Options:  Delete, [Approve](#), [Send E-mail](#)
- Step 3:**
  - Deadline Date: 4/22/2010
  - Approver: Other 1
  - Email Definition: jean@csoresearch.com (e-mail address), Dean (description)
  - Options:  Delete, [Approve](#), [Send E-mail](#)

You can keep track of where co-op records are in the Work Flow Approval process by clicking on "Co-op Work Flow In Progress" under Quick Links in your left nav bar.

NOTE: This will only show you the status of all work flows in progress for which you are listed as the primary/secondary manger.



Status	Co-op Term	E-mailed	Viewed	Deadline	Approver	E-mail	Student	Employer	Manager	Action
OVERDUE	Summer 2010	3/30/2010	4/1/2010	3/31/2010	Student	jason@csoresearch.com	Monikka Condde	USARA	Primary	View Resend E-mail
Pending	Spring 2010	4/14/2010		4/15/2010	Faculty	jean@csoresearch.com	Betty Davis	USARA	Primary	View Resend E-mail
REJECTED	Spring 2010	4/14/2010	4/14/2010	4/22/2010	Contact	jason@csoresearch.com	Lynn Berger	USARA	Primary	View Resend E-mail

STEP FIVE: Upload co-op documentation file.

This step is optional, but if you have any file that you would like to store with the co-op record you can upload it to the Documentation section. You can only upload one file to this section per co-op record.

Profile View | Report A Co-op/Intern Hire | Timeline Information | Work Information | Intern/Co-op Information

**Documentation** | Approval Work Flow

Save Cancel

Co-op Document (name):

Co-op Document (file):  Select

Save Cancel

### CREATING A STUDENT’S CO-OP TIMELINE AS A STUDENT

A student can now initiate the co-op process using the “Report a Co-op/Intern Hire function under their left nav menu.



Term selection defaults to current term. If we are not in a current term, it selects the upcoming term.

Select Co-op Term: Spring 2010

**What position was filled?**

If the results did not return the position that was filled, [click here](#) to enter position information.

My Jobs | My Schedules

Job ID	Job Title	Employer Name	Post Date	Expiration Date	Action
139	Chris co-op test job	USARA	3/29/2010	4/28/2010	Select Job

1

NOTE: This process works similar to the regular “Report a Hire” function. The student will have the option of selecting a job that they already referred themselves to or they can manually enter the co-op position.

Below is an example of what the student will need to fill in when they Report a Co-op/Intern Hire.

Timeline Information	
Co-op Type:	At Work
Job Title:	Coop Test
Start Date:	<input type="text"/>
End Date:	<input type="text"/>
Position Type:	<input type="text"/>
Salary:	0.00
Pay per Period:	<input type="text"/>
Estimated Hours per Week:	<input type="text"/>

Work Information	
Supervisor:	<input type="text"/>
Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Zip:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
Email:	jason@csoresearch.com

Intern/Coop Information	
Learning Objectives:	
*Learning Goal 1:	<input type="text"/>
*Goal 1 to be met through the following tasks:	<input type="text"/>
Learning Goal 2:	<input type="text"/>
Goal 2 to be met through the following tasks:	<input type="text"/>
Learning Goal 3:	<input type="text"/>
Goal 3 to be met through the following tasks:	<input type="text"/>
Internship Project:	
Project Type:	<input type="text"/>
Project Description:	<input type="text"/>
Project Deadline:	<input type="text"/>
Score:	<input type="text"/>
Work Term Number:	<input type="text"/>
Course:	<input type="text"/>
Section:	<input type="text"/>
Credits:	<input type="text"/>

Documentation	
Co-op Document (name):	<input type="text"/>
Co-op Document (file):	<input type="text"/> <input type="button" value="Select"/>
<input type="button" value="Finish"/> <input type="button" value="Cancel"/>	

If a student already has a Co-op Record marked At Work for the selected Co-op Term and it is linked to an employer/contact/job they will receive the message below and will not be able to continue with this term selected.

**A record exists for this term and is in progress.**

Select Co-op Term:

**What position was filled?**

If the results did not return the position that was filled, [click here](#) to enter position information.

My Jobs    My Schedules

Job ID	Job Title	Employer Name	Post Date	Expiration Date	Action
139	Chris co-op test job	USARA	3/29/2010	4/28/2010	Select Job

1

Once the student has reported their Co-op/Intern Hire it will go into your Co-op Records pending bin for approval.

- Pending ^
- Students 10
- Jobs 1
- Flagged Jobs 1
- Mentors 2
- Contacts 2
- Schedules 15
- Placements 0
- Co-op Records 3

## EVALUATION SURVEYS

To create evaluation surveys you will need to go to Databases>Surveys. After you have created the survey you will need to mark that it is a Co-op survey and mark if it is for Students or Contacts.

Title	Type	Co-op	Eval Question	Criteria	Prompt	Active	Action
Employer Evaluation of a Co-op Student	Contact	True	Overall Rating & Co-op Grade	[None]	True	True	[Update] [Cancel]
Student							
Status:	Open		# Responses:	1			
Created:	11/4/2009		Launched:	11/4/2009			
Start:	11/4/2009		End:	12/4/2010			
Link:	http://surveys.myinterfase.com/TakeSurvey.aspx?SurveyID=1731						
Student Co-op	Student	True	How would you rate this work period?		True	True	[Edit]

If you set prompt to TRUE they will be prompted to take the survey when they log into the site. This will be the same link they receive in the email, so they will still only be able to take the survey once.

From here you can also designate an evaluation question. The answer to this question will be recorded within the Co-op Records activity tab in the Student Evaluation and Employer Evaluation fields. These fields can then be pulled into a report.

Title	Type	Co-op	Eval Question	Criteria	Prompt	Active	Action
Employer Evaluation of a Co-op Student	Contact	True	Overall Rating & Co-op Grade	[None]	True	True	[Update] [Cancel]
<b>Status:</b> Open <b>Created:</b> 11/4/2009 <b>Start:</b> 11/4/2009 <b>Link:</b> <a href="http://surveys.myinterfase.com/TakeSurvey.aspx?SurveyID=1731">http://surveys.myinterfase.com/TakeSurvey.aspx?SurveyID=1731</a>			<b># Responses:</b> 1 <b>Launched:</b> 11/4/2009 <b>End:</b> 12/4/2010				
<b>Student Co-op</b>	Student	True	How would you rate this work period?		True	True	[Edit]

Student co-op record with completed evaluation survey:

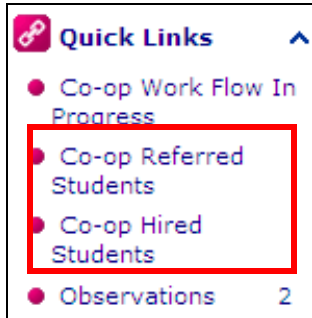
Co-op Term	Co-op Type	Work Term Number	Description	Action
2009, Fall	At Work	1	Employer: Olin Corporation Contact: Angie Standefer Job: Engineering/Business Trainee Student Eval: Superior/Excellent Employer Eval: Outstanding - Grade A	View Remove
2010, Winter	At School	1		View Remove
2010, Spring	At School	2		View Remove
2010, Summer	At Work	2	Employer: Olin Corporation Contact: Angie Standefer Job: Engineering/Business Trainee	View Remove

Profile View	Timeline Information	Work Information	Intern/Co-op Information	Approval Work Flow
<b>Links</b> <b>Student:</b> Betty Davis <b>Organization Name:</b> Olin Corporation <b>Contact:</b> Angie Standefer <b>Job:</b> Engineering/Business Trainee <b>Schedule:</b>				
<b>Timeline Information</b> [Edit]				
<b>Co-op Term:</b> 2009, Fall <b>Co-op Type:</b> At Work <b>Student Evaluation:</b> <a href="#">Edit: Student Co-op Work Report</a> <a href="#">View: Student Co-op Work Report</a> Survey was completed. <b>Employer Evaluation:</b> <a href="#">Edit: Employer Evaluation of a Co-op Student</a> <a href="#">View: Employer Evaluation of a Co-op Student</a> Survey was completed.				
<b>Department:</b>				
<b>Intern/Co-op Information</b> [Edit]				
<b>Graduation Month:</b> <b>Graduation Year:</b> GPA: 0.0000 <b>Degree:</b> <b>Majors:</b> Score: <b>Work Term Number:</b> 1 <b>Course:</b> Credits: 0 <b>Enrolled Date:</b> <b>Paid Fee Date:</b> <b>Student Eval:</b> Superior/Excellent <b>Employer Eval:</b> Outstanding - Grade A				

Once the evaluations are completed you will be able to view and edit the evaluations directly from the student's co-op record.

## TRACKING CO-OP REFERRALS AND HIRES

We have added two management consoles under Quick Links to help you easily track the students that are working in a co-op position or who have had co-op referrals for this term. With these management consoles you will only see the information for students where you are listed as their Primary or Secondary Co-op Manager in the Student Profile.



**Co-op Referred Students:** Shows referrals that have been made for any co-op job by term and optionally by job for employers, administrators, and/or faculty.

Filter by Co-op Term:

Filter by Job:

**Referred Students**

Page 1 of 1, items 1 to 2 of 2

Date	Student	Job	Job Title	Employer Name	Contact	Manager	Action
3/8/2010	Condde, Monikka	20	test	USARA	Troy Farrar	Primary	View Referral
3/8/2010	Berger, Lynn	20	test	USARA	Troy Farrar	Primary	View Referral

Page 1 of 1, items 1 to 2 of 2

**Co-op Hired Students:** Shows those students working in co-op positions by term for employers, administrators and/or faculty.

Hired students per term

Filter by Co-op Term:

**Hired Students**

Page 1 of 1, items 1 to 6 of 6

Start Date	Student	Job	Job Title	Employer Name	Contact	Manager	Action
	Student, Joe	7	Consulting Co-op	See, Ess & Oh	Dolores Haze	Primary	View Co-op
	Condde, Monikka	7	Consulting Co-op	See, Ess & Oh	Dolores Haze	Primary	View Co-op
3/31/2010	Berger, Lynn	20	test	USARA	Troy Farrar	Primary	View Co-op
	Monroe, Marilyn	13	RubyOn Rails Programmer	Faux Company New Name	CSO Employer	Primary	View Co-op
4/6/2010	Davis, Betty	137	Coop Test	USARA	Troy Farrar	Primary	View Co-op
	Camel, Shadow	133	Test News feed	USARA	Troy Farrar	Primary	View Co-op

Page 1 of 1, items 1 to 6 of 6

## REPORTS

To run reports on the Co-op Timeline you will need to go to Tools> Reports>New Report and select the report type of “Co-op Timeline” and click continue. On the next page you will check off all of the fields that you would like to see in your report. For more detailed instructions please refer to the Interfase User’s Manual.

In the Co-op Timeline report you can pull in the results for the student/employer evaluation questions, as well as when the survey was started and completed.

View of generated report:

Contact	Contact	CoopTi	CoopTimeline	C	CoopTimeli	CoopTimeline	Job Title	CoopTime	CoopTimeline	Stu	CoopTimeline	Stu	CoopTime	CoopTimeli	CoopTime	Employee	Job	Job Title	Stu	Student	L
Angie	Standef	1	2009, Fall	At Work	Engineering/Business Trainee	Superior/E		11/5/2009		11/6/2009	Outstandi		11/5/2009	11/6/2009	Olin Corp	Engineering/	Betty Davis				
Angie	Standef	2	2010, Winter	At School	Engineering/Business Trainee										Olin Corp	Engineering/	Betty Davis				
Angie	Standef	3	2010, Spring	At School	Engineering/Business Trainee										Olin Corp	Engineering/	Betty Davis				
Angie	Standef	4	2010, Summer	At Work	Engineering/Business Trainee										Olin Corp	Engineering/	Betty Davis				
Angie	Standef	5	2009, Fall	At Work	Engineering/Business Trainee										Olin Corp	Engineering/	Maril Monroe				
Angie	Standef	6	2010, Winter	At School	Engineering/Business Trainee										Olin Corp	Engineering/	Maril Monroe				
Angie	Standef	7	2010, Spring	At School	Engineering/Business Trainee										Olin Corp	Engineering/	Maril Monroe				
Angie	Standef	8	2010, Summer	At Work	Engineering/Business Trainee										Olin Corp	Engineering/	Maril Monroe				

## CO-OP MODULE SETUP

### CO-OP TIMELINE TERMS

To add new co-op terms you will need to go to Tools>Setup>Co-op Timeline Terms.



Once you are under the Co-op Timeline Terms setup menu you will need to click “Add New” to create the new timeline term. This will give you a pop-up box to fill in the name of the term, date range and select which evaluation survey should be sent for this term.

**Co-op Term:**

*Description:* Insert the name of the term that you are trying to create. The co-op timeline terms will sort by the description, so we suggest putting Year, Term.

*Active:* If you would like this term to be available when setting up a student’s co-op record please check the box.

*Start Date:* This is the date that the term should start. \*

*End Date:* This will be the last day for this term. \*

\* The start and end dates must be filled out prior to saving the new co-op term.

**Student/Employer Survey:** Select the evaluation survey that you would like the students/employers to take for this term. You will be able to mass change these surveys for particular records if you have a special evaluation for specific majors.

*Start Date:* This will be the start date for the survey and it will prompt the email to be sent to the student/employer to notify them that the evaluation survey is ready.

















*Deadline Date:* This is the last day that the student/employer will be able to take the survey.

*Reminder Date:* If you would like the student/employer to receive a reminder before the deadline date you will need to fill in the reminder date.

*Reminder Interval:* If you would like the student/employers to receive more than one reminder to take the survey you can set up the interval for how often it should be sent up until the deadline date.

**SYSTEM EVENT EMAIL TEMPLATES**

To customize the emails that are sent to students/employers about the evaluation surveys you will need to go to Tools>Setup>Templates. There are four templates for each the student and the employer. Please refer to the Supervisor’s Manual for more information on editing and activating system event email templates.

<b>Login Approved</b>	Interbase.		
<b>EMPLOYER - Co-op Evaluation Completed by Employer (nightly)</b>	Occurs to notify that an employer has completed a co-op evaluation.	 	<a href="#">[Edit]</a>
<b>EMPLOYER - Co-op Evaluation Completed by Student (nightly)</b>	Occurs to notify employer that student has completed a co-op evaluation.	 	<a href="#">[Edit]</a>
<b>EMPLOYER - Co-op Evaluation notification (nightly)</b>	Initial notification for employer co-op evaluation	 	<a href="#">[Edit]</a>
<b>EMPLOYER - Co-op Evaluation reminder (nightly)</b>	Reminder for employer co-op evaluation	 	<a href="#">[Edit]</a>
<b>STUDENT - Co-op Evaluation Completed by Employer (nightly)</b>	Occurs to notify student that an employer has completed a co-op evaluation.	 	<a href="#">[Edit]</a>
<b>STUDENT - Co-op Evaluation Completed by Student (nightly)</b>	Occurs to notify that a student has completed a co-op evaluation.	 	<a href="#">[Edit]</a>
<b>STUDENT - Co-op Evaluation notification (nightly)</b>	Initial notification for student co-op evaluation	 	<a href="#">[Edit]</a>
<b>STUDENT - Co-op Evaluation reminder (nightly)</b>	Reminder for student co-op evaluation	 	<a href="#">[Edit]</a>

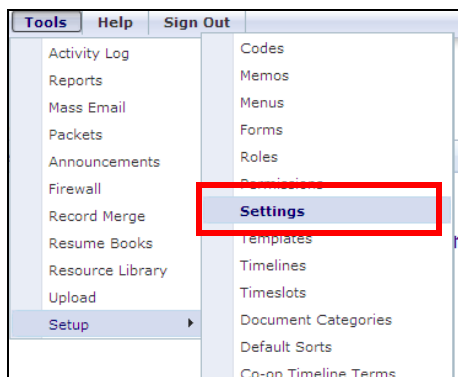
The Employer – Co-op Evaluation notification and reminder emails will contain all students from that Co-op Term. This means that the employer will receive one email containing a link for each student evaluation survey that they are linked to.

**EMPLOYER – Co-op Evaluation Notification and Reminder Email Setup:**

1. Everything except the student data needs to be in the header or footer. This includes any merge fields for employer or term data.
2. The header and footer must be a section header and footer. You can create the section header and footer in the Word document by going to Page Layout – Breaks then select Continuous to insert a break. Once this is done you will notice that the header and footer say “Section 1”.

**REFERRAL SETTINGS**

To customize if existing referrals change statuses when a student is hired into a position, you will need to go to Tools>Setup>Settings.

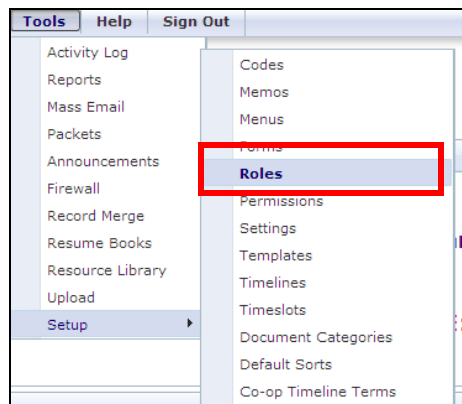


When these settings are in use the system will change all referral statuses with the status indicated in the “Status From” setting to the status indicated in the “Status To” setting automatically when one referral for that student is changed to have the status indicated in the “Employment Offer” setting.

System - Co-op Referral - Status From: Resume Referred	<a href="#">[Edit]</a>
System - Co-op Referral - Status To: No Longer Available for Employment	<a href="#">[Edit]</a>
System - Co-op Referral - Status Trigger: Employment Offer - Accepted	<a href="#">[Edit]</a>
System - Daylight Savings / Summer Time: 1	<a href="#">[Edit]</a>

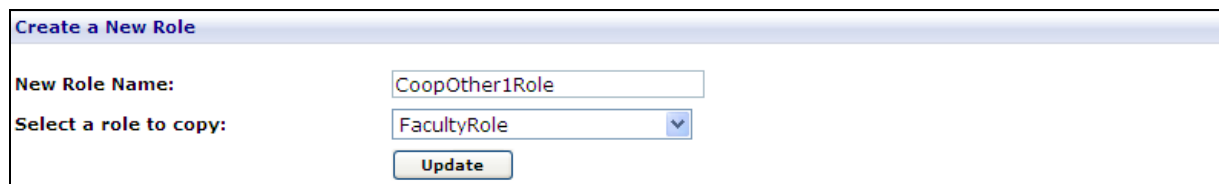
## NEW ROLE SETUP

If you plan to use “Other 1”, “Other 2”, or “Co-op Timeline Supervisor” as approvers for your Work Flow Approval Process then you will first need to create these roles under Tools>Setup>Roles.



From here you will need to type the new role into the “New Role Name” box. If you are planning to use “Other 1” as an approver then your role name will need to be “CoopOther1Role”. If you are planning to use “Other 2” as an approver then you will need to create a second role for “CoopOther2Role”. If you are planning to use “Co-op Timeline Supervisor” under the Contact approver then you will need to create a role for “CoopContactSupervisorRole”.

After you type in the new role name you will need to decide which existing role you want to copy. The new role will start with the same permissions selected as the role you copy, so will want to select the existing role that most closely represents what you want the “Other 1”, “Other 2”, or “CoopContactSupervisorRole” approver to see. Once you have selected the correct role to copy, click the “Update” button to create your new role.

A screenshot of a web form titled "Create a New Role". The form has two main input fields: "New Role Name:" with a text box containing "CoopOther1Role", and "Select a role to copy:" with a dropdown menu showing "FacultyRole". Below these fields is an "Update" button.

Once you have created the new roles you will need to go to Tools>Setup>Permissions to set up what part of the co-op record this approver should be able to see and edit.

NOTE: For more detailed instructions on how to change permissions please refer to the Interface Supervisor’s Guide, which you can find by clicking on the “Help” menu when logged in as an admin.

