SELPA Manager User's Meeting 3.1.2011

- ⊟ **Recent changes**
  - ⊟ **Student records**
    - ☑ Preferences -> System 1 -> Lists -> Student validations
      - ☑ Select error or warning messages, as a function of plan type (10, 20, or 70-80-90).
      - ☑ Affects both web and 4D Client.
      - ☑ Different from the "incomplete" items dialog for IEP forms (Preferences -> Web and multi-user -> Form to use for new IEPs on web -> Options
        - ☑ The IEP items must be addressed before "incomplete" can be un-checked for the IEP.
        - ☑ The IEP items affect the web user only.
    - ☑ Validation item, W919 Transition goal missing won't occur when the As Of date in preferences is after 6.30.2010.
    - ☑ Validation item, "Svc without evaluation date" item available.
      - ☑ Applicable only if neither student nor service are marked as DNR.
    - ☑ New prompt: When user adds a service with a provider code of 300 (Dep't. of Mental Health), the program offers to check the Chap. 26.5 box for the student.
      - ☑ Also batch update from browse window (Special expressions -> "Update Chapter 26.5")
    - ☑ Transition survey (A-100 through A-107) in separate tab.
      - ☑ Batch updaters available in 4D Client.
    - ⊟ Transportation
      - ☑ Citations form (bus incident, parent not home)
      - ☑ Request form
        - ☑ Enter, print, and schedule buttons.
      - ☐ Schedule tab now has "Location type" column ("corner" or "door").
      - ☐ Revised "Find transportation" dialog (Data -> Transportation... in 4D Client)
  - ☑ **DRDP**
    - ☑ CASEMIS DRDP export added November 2010.
      - ☑ Updated to allow the user to select the provider type to be written for LPROV and FPROV.
    - ☑ Six individual fields replace older text areas for languages.
      - ☑ New fields used in preference to old for export.
    - ☑ Error message for combination of "0-Not yet" with "Emerging" check box.
    - ☑ Error message when the completed date is not in the appropriate date range for spring or fall.
      - ☑ Only when not marked as incomplete.
    - ☑ New DRDP 2010 infant/preschool/school age forms added
      - ☑ These are *not* used by CASEMIS
      - ☑ Don't print properly with the Windows pdf drivers (win2pdf and pdf995).
      - ☑ Can prevent them from being displayed (Preferences -> System 1 -> Lists -> "DRDP add record options"
  - ☑ **IEPs**
    - ☑ Customize meeting types for DFL7 drop-down (Preferences -> System 1 -> Lists -> "IEP DFL7 purpose"
    - ☑ New IEP search dialog (Data -> IEPs...)
      - ☑ Also available on web home page (see below).
    - ☑ New "incomplete" items can be specified for web.
      - ☑ Service overlap start/end date
        Services without frequency; location code; minutes or duration; provider code; start and/or end date; teacher name.

New "incomplete" items can be specified for web.

SELPA Manager User's Meeting 3.1/2011
- Service overlap, start/end date

- ☑ Services without frequency; location code; minutes or duration; provider code; start and/or end date; teacher name.
- ☑ Web "incomplete" items available in 4D Client for DFL6, DFL7 ("Incomplete items" button near bottom of IEP form).
- ☑ Administrative users ("AdminGroup") can un-certify IEP by pressing a button.
- ☑ More types of IEP attachments allowed
  - ☑ Word, Excel, PowerPoint, plain text, pdf
  - ☑ May need to declare "Helper applications" in web browser preferences.
  - ☑ Others can be attached but web browser may not know how to deal with them when sent back (from server to web user).
- ☑ IEP certified notification, for admin or read-write users (4D Client)
  - ☑ Preferences -> Appearance -> Notify me every <xx> minutes about newly certified IEPs.
- ☑ Revision on DFL7 team meeting notes page to accommodate longer text
  - ☑ Text fields are normally limited to 32,000 characters (8-10 pages printed)
  - ☑ Special tabs on 4D Client page

- ☑ **Web home page**
  - ☑ Slight reorganization to simplify appearance and function.
  - ☑ Printing functions are now in the navigation bar, and include tool tips when the mouse hovers.
  - ☑ Added DRDP search options to the Find student drop-down menu.
    - ☑ Completed date before / complete date on/after / complete date blank
    - ☑ Form marked incomplete
    - ☑ Eligible infants/preschoolers for fall/spring evaluation period.
  - ☑ Added "attachment" icon to IEP list, for IEPs that have one or more documents attached.
  - ☑ Added "Last DRDP" column to upper/student list.
  - ☑ Page moves vertically back to where it was when the user navigates to the next / previous set of records.
  - ☑ Added a multi-level search for IEPs (hidden section).
    - ☑ Multi-level preference remembered when re-opening the search section.

- ☑ **Web user session management**
  - ☑ New web user warnings
  - ☑ Instant messages (same as for 4D Client users).
    - ☑ Instant messages last until the next day, or until the administrator removes them.
  - ☑ Idle hold release within 2 minutes (student and IEP records).
  - ☑ Idle hold release imminent (student and IEP records).
  - ☑ Idle logoff within 5 minutes (most web locations).
  - ☑ Idle logoff within 2 minutes (most web locations).
  - ☑ Web user can disable hold warnings (but not idle logoff warnings) from home page preferences.
  - ☑ Three new slide controls under Preferences -> Web and multi-user -> Multi-user.
    - ☑ Polling delay (idle user, frequency for testing)
    - ☑ Log off
    - ☑ Release hold
  - ☑ Return to logon page (check box) - attempts to save user's work on a student or IEP record, prior to logoff.

- ☐ **Reports**
  - Command / Cntrl-P now calls the Report Assistant (4D Client)

SELPA M̶a̶n̶a̶g̶e̶r̶ User's Meeting 3.1.2011

Reports

- ☐ Command / Cntrl-P now calls the Report Assistant (4D Client)
  - ☐ Hold down Cmd/Alt to access old print dialogs (where available).
- ☑ District chargeback by school type now accounts for multi-day holidays on the calendar.
  - ☑ Specify both start and end dates (can be the same).
  - ☑ Event must be a "holiday".
  - ☑ Description must include school type (e.g., "Juvenile court school", "Hospital facility", etc.).
- ☑ Caseload summary now prints SSID rather than SSN.
- ☑ IEP status report (new)
  - ☑ Each IEP appears as a separate, listed item.
  - ☑ Meeting type, form type, status, completion level (DFL6, DFL7), diagnostics (DFL6, DFL7).
  - ☑ Summary information at bottom of report.
  - ☑ Also available on the web home page.
- ☑ Goal progress summary (new)
  - ☑ Web home page only (Print reports menu -> IEPs)
  - ☑ DFL6, DFL7 form sets only.
  - ☑ User must click on IEP in lower/green list first
- ☑ Attendance registers from web home page (new dialog).

- ☑ **Imports**
  - ☑ Added a 2010-2011 CASEMIS Table A import. In addition to fixed-column, it can import csv or tab-delimited files, if it is able to recognize the type.
  - ☑ The CASEMIS Table B import will handle csv or tab-delimited files, if it is able to recognize the type.
  - ☑ SELPA Central
    - ☑ Alphabetized update item check boxes.
    - ☑ Default now is *not* to update districts, schools, or teachers.
    - ☑ Option to skip IEPs on import (runs faster).

- ☐ **Server notes**
  - ☑ **Maintenance practices**
    - ☑ Run 4D Tools at least monthly
      - ☑ Run at least weekly for more active sites
    - ☑ Ensure that 4D Server has an active log file.
      - ☑ 4D Backup should save/re-create the log file each night, so that it does not keep growing
  - ☐ **Server configuration**
    - ☑ Audit Trail
      - ☑ Specify deletion of old history after a selected number of days
    - ☐ Do not run Windows Backup Agent or Volume Shadow Copy (services)
    - ☑ 4D Backup should make the backups to the local (C or D) drive
      - ☑ Use network file share and batch process to move contents of 4D Backup folder to another drive on your network.
    - ☑ Antivirus software
      - ☑ Exclude the SELPA_Mgr_v475 folder from scanning
      - ☑ Exclude the .4DC, .4DR. .4DD, .4DR, .4DL, .4BK files if possible
    - ☐ Windows automatic updates (Windows server only)
      - ☐ Specify notification only for new updates; or automatic download with manual installation. Automatic updating will cause 4D Server to quit on re-boot, may damage data file.

Windows automatic updates (Windows server only)

- □ Specify notification only for new updates; or automatic download with manual installation.
  - □ Automatic updating will cause 4D Server to quit on re-boot, may damage data file.
- □ Running 4D Server as a service under Windows
  - □ Reduces the likelihood of unexpectedly quitting 4D Server (data file damage).
  - □ Be careful not to also start 4D Server on the desktop at the same time (check services control panel or taskmgr before starting on desktop)
- ⊟ **SSL certificate renewals**
  - □ Browsers now use 256-bit certificates for added security (formerly 128-bit).
  - ⊟ Generate certificate signing request using OpenSSL tool rather than 4D itself.
    - □ `Example request syntax (e.g., for Terminal in Mac OSX)`
      - □ `openssl req -new -newkey rsa:2048 -nodes -out <server address>.csr -keyout <server address>.key -subj "/CN=<server address>"`
      - □ `Places private key and certificate signing request files in user's home directory`
    - ☑ Link to generate OpenSSL request:
      http://www.qualityssl.com/en/support/openssl-csr-tool.lasso
  - □ Place new cert.pem (from certificate issuer) and key.pem (from OpenSSL) into the SLPA_Mgr_v475 folder, then re-start 4D Server.
  - □ We can assist in obtaining the SSL certificate for you.
- □ **Purchasing a new server**
  - □ If Windows 2008 Server is pre-installed, add Windows 2003 R2 Server OS downgrade disks to purchase.
    - □ 4D 2003 Backup apparently doesn't work on Windows 2008 Server OS.
  - □ Disk mirroring or mirror/stripe (RAID 1+0), preferably with hot swap for failing drives
  - □ 4 GB RAM is the maximum that Windows 2003 Server can address (32-bit).
  - □ Avoid virtual server configurations (risk of data damage).
- □ **Requests**
- □ **Questions**