

Notes on Multiple Organizations within States and Multiple Users with Organizations

The SOAR Data Tracking Program is an Access-based database that was originally envisioned as a means for a case manager to electronically keep track of his or her SOAR application work. When the demand for the program became more widespread, interest in use by multiple organizations within a state or by multiple users within an organization arose. To meet this demand for a central data consolidation system that takes into account satellite sites, multiple users, and cumulative reporting abilities, we did the following:

- Made modifications to the Tracking Program's data extract capabilities.
- Added site ID and user ID settings to the Tracking Program.
- Created a companion program called "The SOAR Data Consolidation Program".
- Made the following outline of usage and installation scenarios.

Multiple Organizations within a State

If multiple organizations within a SOAR State want to use the program, the following procedure should be followed:

- The SOAR Team Lead assigns a unique 7-digit site ID number (e.g. 0000002) to each organization that will use the program.
- Each organization enters and saves its unique site ID into the "Site Settings" section of their respective installation(s) of the program.
- The SOAR Team Lead installs the SOAR Data Consolidation program.
- Within the Consolidation Program, the SOAR Team Lead saves all of the names of the organizations that will be using the Tracking Program with their unique site IDs.
- Satellite organizations generate data extract files and email them as directed to the SOAR Team Lead.
- The SOAR Team Lead imports all of the received extract files into his or her Consolidation Program. This allows him/her to report on all data collected from the State.

Multiple users within an organization

If multiple case managers/workers at the same organization want to use the Tracking Program, this can be done in one of two ways:

Shared installation

If all of the case managers/workers at an organization want to keep track of the data in a single, shared database, a shared installation should be done using a network drive and shortcuts.

Reports generated within the program would contain all this data. To set up the program in this manner, the following steps should be taken:

- One copy of the program is installed on a shared network drive.
- Each user creates a shortcut to the program on his or her computer.
- In cases where multiple organizations are using the program within a State, the 7-digit site ID number assigned to this particular organization by SOAR Team Lead should be entered and saved into the “Site Settings” section of the program.
- Since only one copy of the program has been installed within the organization, there is no need for unique 2-digit user IDs to be assigned to users. Therefore, a user ID of “01” should be entered and saved into “Site Settings.”
- When a SOAR Team Lead requires extract files from the organization, only one extract file would have to be sent since all users are sharing a copy of the program.

Separate installations

If multiple case managers/workers at the same organization want to install separate copies of the program on their respective computers, the various installations cannot communicate with each other. In other words, each user’s data will be saved in a separate copy of the program. To set up the program in this manner, the following steps should be taken:

- Each case manager/worker entering application data installs a copy of the SOAR Data Tracking Program on his or her computer.
- The head or manager of the organization assigns a unique 2-digit user ID number (e.g. 03) to each person who installs the program.
- The user ID numbers are entered and saved into in each copy/installation of the program in the “Site Settings” section.
- In cases where multiple organizations are using the program within a State, the 7-digit site ID number assigned to this particular organization by the SOAR Team Lead is also entered and saved into the “Site Settings” section of all users’ copies of the program.
- When a SOAR Team Lead requires extract files from an organization, each user at that organization would have to generate and send a file. Each extract file will be automatically named to include the user’s id and site id. (e.g. At organization 0000007, if John Doe is user 01 and sends an extract file, its filename will include 0000007-01. At the same organization, if Jane Doe is user 02 and sends an extract file, its filename will include 0000007-02)
- NOTE: In addition to being used to report on all of the data from multiple organizations within a State, the SOAR Data Consolidation Program can also be installed and used by the head or manager of an organization to report on all of the users within the organization who have chosen individual installations.