
Jenzabar CX

Getting Started



JENZABAR

User Guide

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JENZABAR, INC.
GETTING STARTED USER GUIDE

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SECTION 1 - INTRODUCTION TO JENZABAR CX

Overview

Introduction

Jenzabar CX (sometimes referred to as “CX”) provides administrative computing solutions for colleges and universities, using a single relational database and a variety of programs that meet the specific needs of postsecondary institutions. Specifically, CX features the following functional areas:

- Enrollment Management
- Student Services
- Financials
- Financial Aid
- Institutional Advancement
- Human Resources
- Facilities Management
- Information Management

Jenzabar CX Product Formats

Jenzabar CX can appear in two formats: the character-based format, and the graphical user interface (GUI) format. The following table lists and describes the differences between the two formats.

Difference	Character-based Format	GUI-based Format
Appearance	Typically a black terminal display with letters and numbers in a single contrasting color.	Customized monitor colors, with different parts of the display in different colors
Command selection	One of the following: Keyboard entry Arrow keys and <Enter> key	One or both of the following: • Keyboard entry • Mouse point and click
Computers	Runs on terminals that connect to a mainframe at your institution.	Runs on personal computers (PCs) using a network and client/server functionality.
Cursor movement	Arrow keys and <Enter> key	One or both of the following: • Mouse point and click • Arrow keys

Purpose Of This Guide

This guide serves as a learning tool and a reference guide for basic system features and functions. It contains introductory information, and general topics that relate to all the offices on an institution’s campus.

Intended Audience

This guide is for use by menu users in every campus office who perform data entry operations. Menu users include the track coordinator, administrative assistants, and operators.

Learning Objectives

Using this guide, you will be able to:

- Navigate the menus in Jenzabar CX
- Identify and use the different kinds of screens in Jenzabar CX
- Schedule multiple tasks and processes
- Use electronic mail to communicate with others on your campus and in other locations (if applicable)
- Enter data into the system
- Locate data
- Use the basic menu options
- Identify the resources you can use to communicate with Jenzabar and with other CX users

How To Use This Guide

This guide contains a section for each main topic. If you are not familiar with CX's functions and features, read each section of this guide for detailed information.

If you are familiar with Jenzabar CX, and just need information in a particular area, look through the Table of Contents or Index and refer to the pages you need.

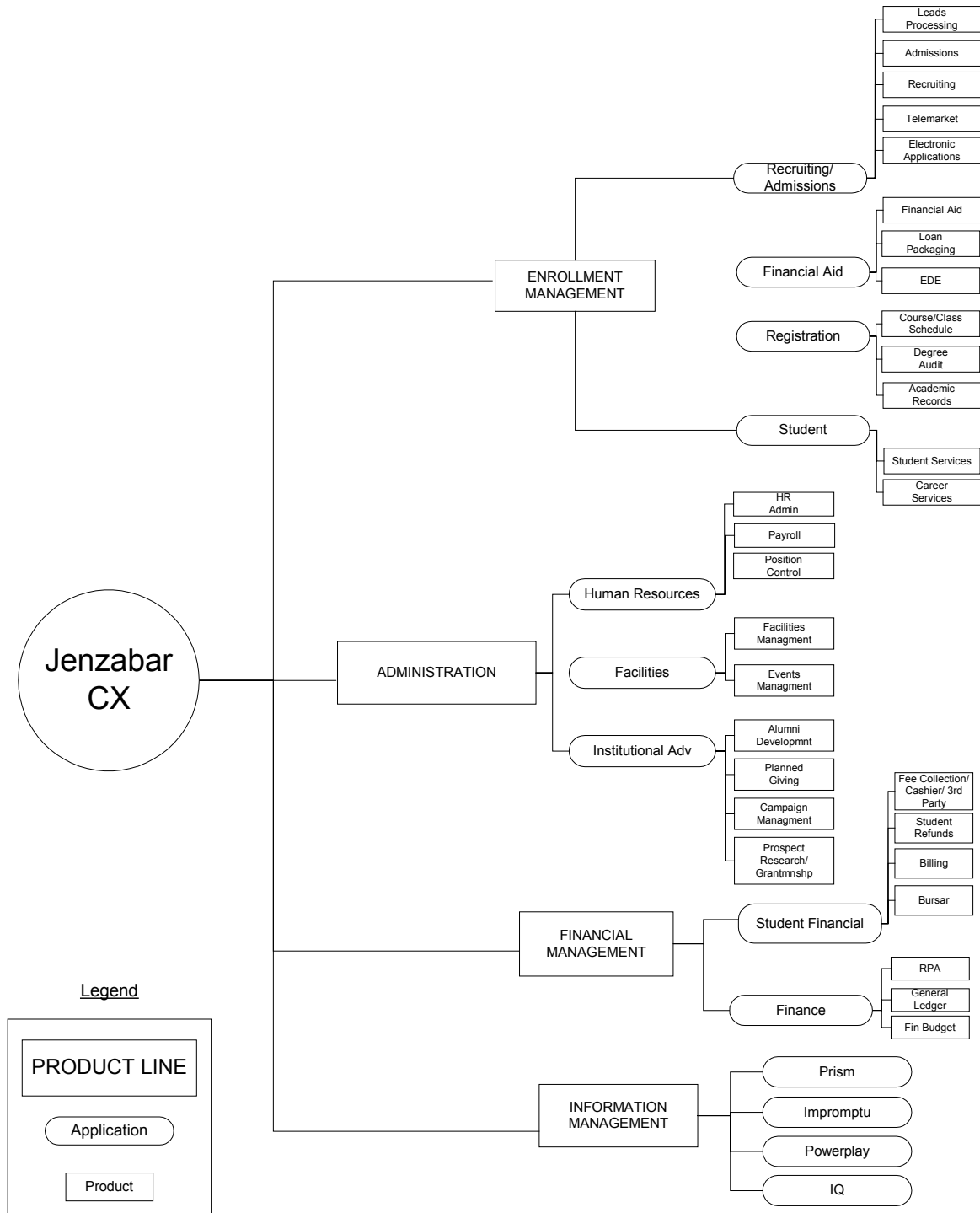
Other Information Resources

Since this guide is introductory, it does not provide detailed instructions about processing specific types of information or performing particular tasks. The following lists and describes the other sources of information you, your Computer Center staff, and your Jenzabar coordinator can use with the system.

<i>For more information about:</i>	<i>See:</i>
<ul style="list-style-type: none">• General Process Descriptions• Screen, field, and command descriptions• Procedures for completing tasks• Error correction procedures• Glossaries	<i>Jenzabar CX User Guides</i>
<ul style="list-style-type: none">• An implementation task list• Individuals responsible for implementation• Resources to use for implementation	<i>Jenzabar CX Implementation Guides</i>
<ul style="list-style-type: none">• Process and program flows• Implementation tools• Maintenance procedures• System failure recovery	<i>Jenzabar CX Technical Manuals</i>
<ul style="list-style-type: none">• Database administration• SQL usage• Error messages• Tutorials	<i>Informix Manuals</i>
<ul style="list-style-type: none">• Conversion• UNIX• MAKE processor• Text Editors• Screen modifications• Software Modification Orders (SMO)• Product Updates	<i>Jenzabar CX course manuals</i>

Jenzabar CX Product Structure

The following diagram illustrates and breaks down the Jenzabar CX product lines.



Before You Begin Using Jenzabar CX

Introduction

This section provides the following:

- A summary of the overall Jenzabar CX functions and features
- A description of the ways institutions can customize CX to meet their unique needs
- A checklist of information you need to know and tasks you need to perform before using CX
- Login and logout information
- Background knowledge you must possess to use CX

Purpose of Jenzabar CX

The primary purpose of the system is to enable you to enter, maintain, and report information about your institution's applicants, students, alumni, employees, and financial transactions.

Customizing Techniques for Jenzabar CX

- Although the institutions that use the system share a variety of reporting and processing needs, each institution also has unique requirements. For example, in the accounting area, an institution's account numbers can be completely different from every other institution.
- The basic features of CX address the common needs that most institutions share. For example, the system provides a variety of standard reports that every institution can use. However, to meet your unique requirements, CX can be customized in the following ways:

Tables

Jenzabar CX is *table-driven*. In a table-driven system, you enter your unique codes, structures, and policies in tables, and the system accesses the tables to obtain the values it needs to process. For example, the system obtains your unique account numbers from tables.

Macros

The system can also be customized with macros that control some processing capabilities. When your Jenzabar coordinator enables or disables macros, various features and menu options become available or are removed.

Screens

Another customization method your institution can use is to reformat the screens that you use to enter data so that they look like your institution's unique data entry forms. Your Jenzabar coordinator usually performs this type of modification, sometimes with the help of Jenzabar personnel.

Reports

Your Jenzabar coordinator (or Jenzabar consultants) can also create new reports or customize existing reports to meet your reporting requirements.

Programming (Consulting)

Lastly, if your processing needs are so unique that they require additional computing capabilities, your Jenzabar coordinator or consultants from Jenzabar can make programming changes to accommodate your needs.

Changes to the standard system, including screen modifications and customized programming, are called *local modifications*.

Screen Differences

This guide (as well as other Jenzabar CX guides) contains examples of screens and reports based on the standard product. Because your institution may have modified some of the screens and records in the system, the screens and reports that you see on your terminal or in hard copy may differ from those in this guide.

PrerequisiteTasks

Use the following checklist to ensure that you have reviewed all required tasks before you begin using the system:

- Ensure that the Jenzabar coordinator has set up a login for you.
- Learn your login name.
- Learn the password that you must use to login to the system.
- Learn how the system users at your institution login and logout from the system.
- Identify the individuals to whom you can refer questions or problems.

Requirements for Logging In

Before you can access any of the CX menus and screens, you must successfully login to your institution's system. Login procedures differ from location to location; however, in general, you must know your computer username (this is usually a variation of your first and last names or initials) and your password. Your Jenzabar coordinator must provide this information when you first login to the system. After your first login, you can use CX menu options to customize your password so that only you know this code.

Note: Only the Jenzabar coordinator can change a user name; when you type your password at the password prompt, the letters you type do not appear on the screen. This feature helps you to keep your password a secret. *Never tell anyone your password.*

QuickMate Login

To start QuickMate (the graphical user interface for CX), do the following:

1. Double-click on the QuickMate icon in the QuickMate program group. The QuickMate Application initiates and runs in a minimized state, appearing as an icon at the bottom of your PC screen.

Note: This step is not required if QuickMate starts automatically on your PC.

2. Is this your first time starting QuickMate?
 - If yes, start a Telnet session in response to QuickMate's prompts.
 - If no, go to step 3.

Note: After the first time that you use QuickMate to start a Telnet program, QuickMate automatically starts that Telnet program each time you start QuickMate. You can also specify a Telnet program to be started by using the Telnet option on the QuickMate control menu.

3. Access the menu. It will activate in GUI mode, displaying the following:
 - The message, "MENU is running in a window on your PC."
 - A window that contains the CX menu.

Requirements for Logging Out

At the end of a CX processing session, you must *exit* from CX and *log out* from your institution's computer system. When you log out, you disconnect from CX and from your institution's computer. Exit and logout procedures differ from location to location, but generally include the following:

- You can exit only when a CX menu appears on your terminal. (Each menu includes the Exit option.)
- When you press **E**, a Jenzabar logo will appear on the terminal.
- In most cases, you must enter **logout** at a screen prompt to logout from the computer system.
- Your Jenzabar coordinator can set up your system so that, if you are running background tasks, you cannot exit CX. Under this setup, if you attempt to exit, the system displays the message "Background tasks exist," and the CX menu will continue to appear on your terminal until the tasks complete (or you terminate the tasks yourself). You can lock your terminal if you want to leave your work area while your processes finish.
- If you schedule tasks for later execution, you can exit at any time.

Note: For more information about background tasks, scheduling tasks, and locking your terminal, see *Using The Menus* and *Scheduling Processes* in this guide.qqq

Background Knowledge

The following lists and describes the necessary background information that you should know.

Authorized personnel

Know answers to the following questions:

- Who is authorized to enter ID information?
- Who is authorized to access online ID information?

Important dates

Know when the following occur:

- Report deadlines
- End of the institution's fiscal year
- Registration dates

Your institution's policies and procedures

Know answers to the following questions:

- Who can provide assistance when you have questions about the applications you use?
- What permissions do you have for accessing the CX screens and processes?

System modifications

Know answers to the following questions:

- What changes have been made to CX to accommodate the unique requirements of the institution?
- How do the changes impact the way to complete procedures?

QuickMate

Know how to use the following:

- Mouse movement and point and click techniques
- Icons
- Pull-down menus, dialog boxes, menu bars, slide bars

System Processes

The following lists and describes the overall processes involved in using CX.

Note: The process shown below is an example and is not intended as policy guidance. Your institution's process may vary.

Phase 1

Track information about leads, applicants, and other inquiries.

Phase 2

Identify the applicants that have been accepted and admitted.

Phase 3

Process the financial aid requirements for each student.

Phase 4

Register each student for classes.

Phase 5

Record housing information and fees for each student.

Phase 6

Complete billing for each student, and record receipts for each payment.

Phase 7

Produce financial reports as required.

Phase 8

Contact alumni and other friends and constituents as required, and process gifts.

Phase 9

Produce reports and meet ad hoc requests for information as required.

Producing Standard and Customized Reports

Jenzabar CX Reports

CX contains reports, rosters, and forms to support its various functions. For example, you can produce statements for students, financial reports, and lists of donors, class enrollments, and applicants.

Because CX is table-driven, you can also produce reports that contain the table values that your institution uses.

You can access and run reports from the menus to which they relate. For example, table reports appear on the Table Maintenance menu, and student schedules (Student Data Sheets) appear on the Registration menu. A variety of reports appear on the Reports menu, including, for example, enrollment reports, financial aid reports, gift ledgers, invoice forecasts, financial statements, and appointment schedules.

The initial screen that appears when you select a report prompts you to enter any required parameters for producing it. For example, to produce a financial aid report, you enter the financial aid award year, and to produce a Balance Sheet financial statement, you enter the range of accounts that you want to include and the format that you want to use.

Jenzabar provides several solutions to serve your reporting needs. In addition to standard reports located on the various menus, your institution can choose from a variety of reporting tools. Below is a listing of the different reporting tools available to you.

ACE Reports

The standard reports located in the CX menu system. You can access and run ACE reports from the menus to which they relate. For example, standard Admission reports appear on the Admission Reports menu.

You can create customized ACE reports from any CX menu, using the Word Processing menu option. To create and use ACE reports, you must complete the following procedure.

Note: For more information about the use of WPVI, see the Jenzabar's *Communications Management User Guide*.

1. From the WPVI Cabinet list, select the appropriate functional area, (e.g., Recruiting and Admissions).
2. At the WPVI Drawer level, create drawers with the following reserved names:
 - reports (for standard reports)
 - wpreports (for letters)
3. Use the sample format that WPVI creates in either the reports or the wpreports drawer to create customized reports.
4. Run the reports you create from the Utilities: Letters/Labels and Reports menu.

Impromptu®

A PC/Windows-based reporting tool intended for technical users. Using Impromptu and the Jenzabar ODBC driver, you can access CX data to produce reports. Impromptu organizes reporting information in *catalogs*. For example, Jenzabar created the Recruiting and Admissions catalog to serve the reporting needs of the Recruiting and Admissions module.

Note: For more information on using Impromptu, see the online help provided with the product.

PowerPlay®

A PC/Windows-based executive and management data analysis tool. Using static data files downloaded from the CX database, you can use PowerPlay to display and analyze data in a graphical, multilevel, drill-down structure.

Note: For more information on using PowerPlay, see the online help provided with the product.

Conventions Used in This Guide

Introduction

Jenzabar has established a set of conventions to help you use this guide. The conventions presented below are not exhaustive, but they include the more frequently used styles and terms.

Style Conventions

Jenzabar guides observe the following style conventions.

Boldface type

Represents text that you type into the system (e.g., Type **UNDG.**) and command names or keys you use to execute a command or function (e.g., **Finish**).

Bulleted list

Show items not ranked or without a sequential performance.

CAUTION:

Indicates a caution or warning of a potential risk or condition.

<Enter>

Represents the Enter, Return, Line Feed, or ↵ key on your keyboard.

Italic type

Is used in any of these ways:

- To represent a new or key term
- To add emphasis to a word
- To cross-reference a section of text
- To represent a variable for which you substitute another variable (e.g., substitute *filename* with an appropriate filename)

<Key name>

Represents a key that you must press (e.g., **<F1>**).

Note:

Indicates a note, tip, hint, or additional information.

Numbered lists

Show ranking of items or sequence of performance.

Parentheses

When used around a field name, indicate the field is unlabeled. The field description includes the location of the field.

Quotation marks

Represent information written in this guide exactly as it appears on the screen (e.g., The message, "Now Running..." appears.).

Jenzabar CX -Specific Terms

The following list identifies term conventions used in this guide.

Application

A group of one or more software programs that enables you to perform a particular procedure, such as entering student information.

Data

Specific information you enter into fields on a particular data entry screen.

Enter

To type information on a keyboard and execute by either of the following actions:

- Pressing the **<Enter>** key
- Clicking on the OK button
- Selecting **Finish**

F key

Any of the function keys located on your keyboard (e.g., **<F1>**).

Hot key

The capitalized and highlighted letter of a command on a ring menu.

ID

The number assigned to each student or organization associated with your institution (e.g., 12345).

Parameter

A variable in the system that is given a constant value for a specific application (e.g., a date can be a parameter for producing a report).

Select

To execute a command by any of the following actions:

- Performing the keystrokes
- Pressing the hot key
- Highlighting the command or option and pressing the **<Enter>** key
- Clicking the mouse

System

The Jenzabar product, CX (or Jenzabar CX).

Keystrokes

When you see two keys separated by a dash (e.g., **<Ctrl-c>**), hold down the first key (**<Ctrl >**) while pressing the second (**<c>**).

Capitalized Words

In Jenzabar guides, the first letter of each word in a command, option, field name, or menu or screen title is capitalized to set those terms apart from regular text.

SECTION 2 - USING THE MENUS

Overview

Introduction

The purpose of this section is to introduce you to the access and use of the CX menu structure, and to acquaint you with the ways you can navigate the system.

Refer to this section when you have questions about navigating the menu structure.

Menus in Jenzabar CX

The menu is the primary interface between you and your system. It provides you with the following types of processing choices:

- Application choices (e.g., choosing between report processing and data entry for the particular office in which you work)
- Utility facilities (e.g., changing your password or maintaining your electronic files)
- Help (e.g., obtaining information about the menu options)
- Other options (e.g., producing a display of the tasks you have scheduled for later execution)

Menu Differences

The menus in this section represent those contained in the CX standard product in GUI format. If your institution changes these menus to meet its specific needs, then the menus that you see on your screen will look different from those shown in this guide. Your menus will also look different if you use the system in character-based format.

In addition, most institutions customize screens so the workers in each office see only the menu options that they must use to perform their jobs. For example, employees in the Financial Aid office will not see the menu options that relate to Institutional Advancement activities. This practice is another reason why your menus may not match the menus you see in this guide.

Accessing the Menus

Logging into Jenzabar CX

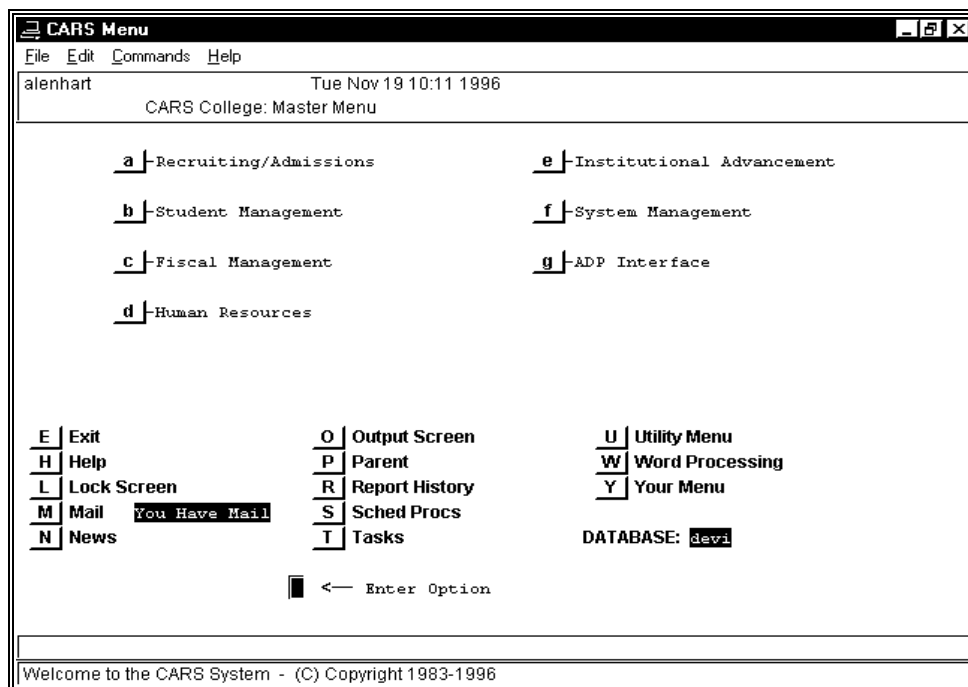
Before you can use CX, you must log in to your computer. Depending on the setup at your institution, you might see a CX menu immediately after your successful login. Alternatively, you may access another type of screen or prompt when you login, and may have to make menu selections or enter commands to display a system screen.

Note: For more information about logging in to Jenzabar CX, see Section 1 in this guide.

Jenzabar CX Master Menu

Following is an example of the CX Master Menu in GUI format. You select an option on the menu by selecting the letter corresponding to the option that you want. Depending on your institution's setup, you might not access this menu, since you do not need to access each of the functional processing areas that appear.

Note: Jenzabar distinguishes between *screens* and *menus*. Both of these types of display appear on your monitor, but *screens* in the system enable you to enter information or execute programs, while *menus* are organizational displays that enable you to access programs, screens, and submenus.



Parts of the Menu

All menus in CX resemble the above example in their general appearance and organization. The following is a list and descriptions of the parts and contents of the menu, in the order that they appear on the menu display.

Top line

Your login name, the day of the week, the date, and the time

Upper half

Lower-case (e.g., a, b, c), menu-specific options

Lower half

Upper-case (e.g., E, H, L), general options

Prompt line

Brackets where you enter a letter to select an upper- or lower-case option

Bottom line

Display of special messages, description of menu options, or certain prompts (e.g., "Invalid option -- please try another selection").

Upper Half of Menu

The upper half of every menu provides access to the functional areas of the product. For example, on the above menu, you press (or click on) **c** to access submenus and program options related to Fiscal Management (accounting).

As you select options from this part of the menu, the display changes to show you either a submenu or an introductory screen for a program.

Lower Half of Menu

The lower half of every CX menu provides access to the general purpose tools that help you carry out your daily functional responsibilities. For example, whether you work in the Registrar's office or in the Office for Institutional Advancement, you need to be able to perform such common tasks as managing your files and reading your electronic mail.

Because you might need to perform these tasks at any time, the menu options on the lower half of the menu never change. Regardless of the menu or submenu that you are using, *the upper-case menu options remain the same, and are available to every CX menu user.*

Selecting Menu Options

Capitalization is important on CX menus. You use your **<Shift>** key, then press the corresponding letter, to select the upper-case menu options that appear on the lower half of the menu. Do not press **<Enter>**.

To select the lower-case menu options on the upper half of the menu, simply press the corresponding letter. Do not press **<Enter>**.

Note: When you use the QuickMate option with Jenzabar CX, you can also place your mouse on the appropriate menu option letter, and click your left mouse button.

General Purpose Menu Options

The following is a list and descriptions of the upper-case, general purpose menu options that exist in the system.

Note: The key command is in parentheses beside the option.

Exit (E)

Lets you exit from the menu system.

Help (H)

Displays an expanded description of each menu option.

Note: To use this option, after you select Help, select the letter corresponding to the menu option to display information about the option. To exit from help and return to the menu, press **<Enter>**.

Lock (L)

Enables you to enter a password so that you can leave your terminal and prevent its use in your absence.

Note: To activate the lock, enter four or more characters for the password. The system requires that you enter the password twice to protect you from entering a password in error, and then not being able to disable the lock. To disable the lock, enter the password again.

Mail (M)

Provides access to electronic mail so you can send and read messages.

Output (O)

Routes a copy of the current menu screen to a printer or a temporary file.

Parent (Previous)

Displays the menu that is one level above the current menu.

Note: This option helps you to retrace your steps through the menu structure, or to switch between tasks.

Report (R)

Provides a history of all the menu options you selected during your current login session, in the order in which the options were selected.

Note: You can produce the report in either forward or reverse order. The system indents the submenus relative to the previous menus.

Scheduled Processes (S)

Enables you to see the status of processes you have requested to process on a delayed basis, (e.g., a process that you scheduled to run at midnight).

Note: If you have scheduled processes, the message “are queued” appears on the menu next to the option “S”. By default, you can have up to nine scheduled processes at any one time. (Your Jenzabar coordinator can change this default if desired.)

Tasks (T)

Indicates the status of tasks that you have requested for immediate execution, or processes that you have suspended.

Note: If you have such tasks, the message “exist” appears next to the option “T”. By default, you can have up to five tasks suspended, and five tasks running at any one time. (Your Jenzabar coordinator can change this default if desired.)

Note: When you select this option, a window containing a description of each task and its status appears.

Utility (U)

Loads the Utility menu, providing you with access to a variety of submenus, commands and options. Utility options include the following:

- Handling and maintaining files
- Controlling print jobs
- Text processing
- Letter processing

The following is a list of sources for more information on the Utility options listed above:

- For more information on handling and maintaining files, see *Managing Your Files* in this guide.
- For more information on controlling print jobs, see *Using Other Menu Features* in this guide.
- For more information on text and letter processing, see Jenzabar's *Communications Management User Guide*.

Word Processing (W)

Enables you to create, edit, store, and retrieve text files using a pre-defined structure set up in a *file cabinet* structure. In accordance with this structure, the following levels of organization exist:

- First level cabinet
- Second level drawer
- Third level file

Your menu (Y)

Displays an outline of the current menu and all the related submenus.

Note: You can produce this outline in option order (e.g., menu option *a* and its submenus, then menu option *b* and its submenus) or in alphabetical order by process name; this option enables you to view a list of the menu options to which you have access, and to identify the location of particular processes that you want to run.

Password-Protected Menus

For enhanced security, some menus and programs are accessible only after you enter a password. The password you use is *not* the password you use when you initially log in to the system; it is assigned by your Jenzabar coordinator. If you need to access a password-protected menu, you must contact the coordinator to obtain the required code.

When you select a menu that has password protection, the system prompts you to enter the password. If you enter it correctly, the message "Successful..." appears at the bottom of the selected menu. If you enter an incorrect password, the system displays the message "Invalid Password", and does not display the selected menu.

Selecting a Menu Option in Error

If you make a mistake in selecting a menu option, the system provides easy ways for you to undo your selection error.

If your error results in the display of a program screen, select Cancel by pressing **<Esc>** (in the GUI-based format) or by pressing **<Ctrl-c>** (in the character-based format) to abort the selection and display the menu from which you made the incorrect selection.

If your error results in the display of a submenu, select Parent (by selecting P) to return to the previous (parent) menu from which you made the incorrect selection.

SECTION 3 - SCREEN DISPLAYS AND COMMANDS

Overview

Introduction

The purpose of this section is as follows:

- To introduce you to the types of screen displays in Jenzabar CX
- To describe the differences and similarities of screen displays in the GUI format and the character-based format

Screen Display Types

This table shows the types of screens that are used by the various components of Jenzabar CX.

PERFORM screens

Informix-based screens that you use for some data entry functions, including most table maintenance. PERFORM screen displays are always in character-based format.

Program screens

Jenzabar-created screens that you use for some data entry functions and program execution. Program screens exist in both GUI-based and character-based formats. In the GUI-based format, the program screens appear in windows.

Detail windows

Jenzabar-created windows that you use to view or enter one or more records associated with a particular record. The windows overlay program screens. In the character-based format, detail windows are called *scroll screens*.

Pop-up windows

Boxes that do not occupy the entire terminal display, but instead may overlay a part of another screen or window. Pop-up windows exist in both GUI-based and character-based formats.

Web pages

Jenzabar-created screens that any PC user with appropriate permissions can use for data entry or data retrieval.

Visual Basic frames

Jenzabar-created windows, produced using the Visual Basic programming tool, that you use for data entry functions and program execution in some product areas. Specifically Human Resources Administration and Human Resources Maintenance use Visual Basic frames.

Using Screens

Screen Formats

Your institution can run Jenzabar CX as either a GUI application (using a mouse and customizable, multi-colored screens), or as a character-based application (using keyboard input only and black screens with a single set color for the characters on the screen). In this guide, most program screen examples are GUI-based screens.

In addition, Web pages and Visual Basic screens are similar to GUI-based screens in terms of navigation and layout.

As a result, all CX program screens offer similar layouts and features, regardless of their GUI-based or character-based formats, or the applications in which they are used. This section describes the common layout of program screens and the techniques for selecting commands on the screens.

Screen Components

The following lists and describes the CX screen components in alphabetical order.

Command button

Graphical buttons, placed within the actual screen area itself, that execute processes. Command buttons are used on Visual Basic screens and Web pages.

Command line

The top line on the screen that occasionally extends to the second line. As the mode of the screen changes (e.g., query mode or update mode), the command line changes. Command lines appear on character-format screens. The toolbar replaces the command line on GUI-formatted screens.

Command menu (or menu bar)

Typically the second or third line on a graphical screen (program screen, Visual Basic frame, or Web page) that contains drop-down lists of commands or screens.

Comment line

A line at the bottom of the screen that provides information about the processes that occur within the system, as well as field entry requirements.

Note: This line also provides the following type of help when you are entering data:

- On all program and PERFORM screens, the comment line contains an expanded description of the field in which the cursor appears. As the cursor moves, the comment line changes.
- On all program and PERFORM screens, the comment line contains valid values, where applicable. For example, if you can complete a particular field with A, B, or C, the comment line provides this information.
- On program screens, pop-up windows, and detail windows, the comment line indicates if you can use table lookup to obtain field values. For example, valid state codes appear in the State table. If you must enter a state code, table lookup enables you to view a list of valid codes and select one of the codes for the field.

Error line

A line at the bottom of program or PERFORM screens that describes an error condition that exists in the field or the process. On character-formatted screens, messages on this line often appear in reverse video, accompanied by an audible tone.

Note: This line sometimes serves as a second comment line.

Field labels

On every type of screen, a brief description of the content of the adjacent area of the screen, (e.g., Name). In rare cases, labels are omitted because they relate to display-only fields or because the screen does not have room for the the label and the field is self-explanatory; in such cases, the documentation for the related field will appear in parentheses (())

Fields

On every type of screen, the area into which you enter or view information, (e.g., the 24-character area in which you can enter a student's name).

Note: Fields can be required or optional, with default or view-only information.

Menu bar

The line on GUI-based screens, Visual Basic frames, and Web pages, that provides access to pull-down menus or commands. The standard commands that appear on the menu bar are File, Edit, Command, and Help.

Pop-up message box

A feature of Web pages, detail windows, program screens, and Visual Basic frames, the means by which messages

Screen title

The name, or label, for the screen that usually appears in the center of the third or fourth line. On some screens, the name appears in capital letters at the beginning of the command line.

Notes:

In Jenzabar's user guides, all screen sections list the screens and their fields in alphabetical order.

Some screens that you use for extensive data entry (or that contain a large number of fields) do not display a screen name. Your user guides refer to unnamed screens by titles relating to their purposes. For example, the main screen in the General Ledger program Voucher does not display a title. The screen's purpose is to create journals and journal entries. Therefore, Jenzabar's *General Ledger User Guide* refers to this screen as the Journal screen.

Scrollbars

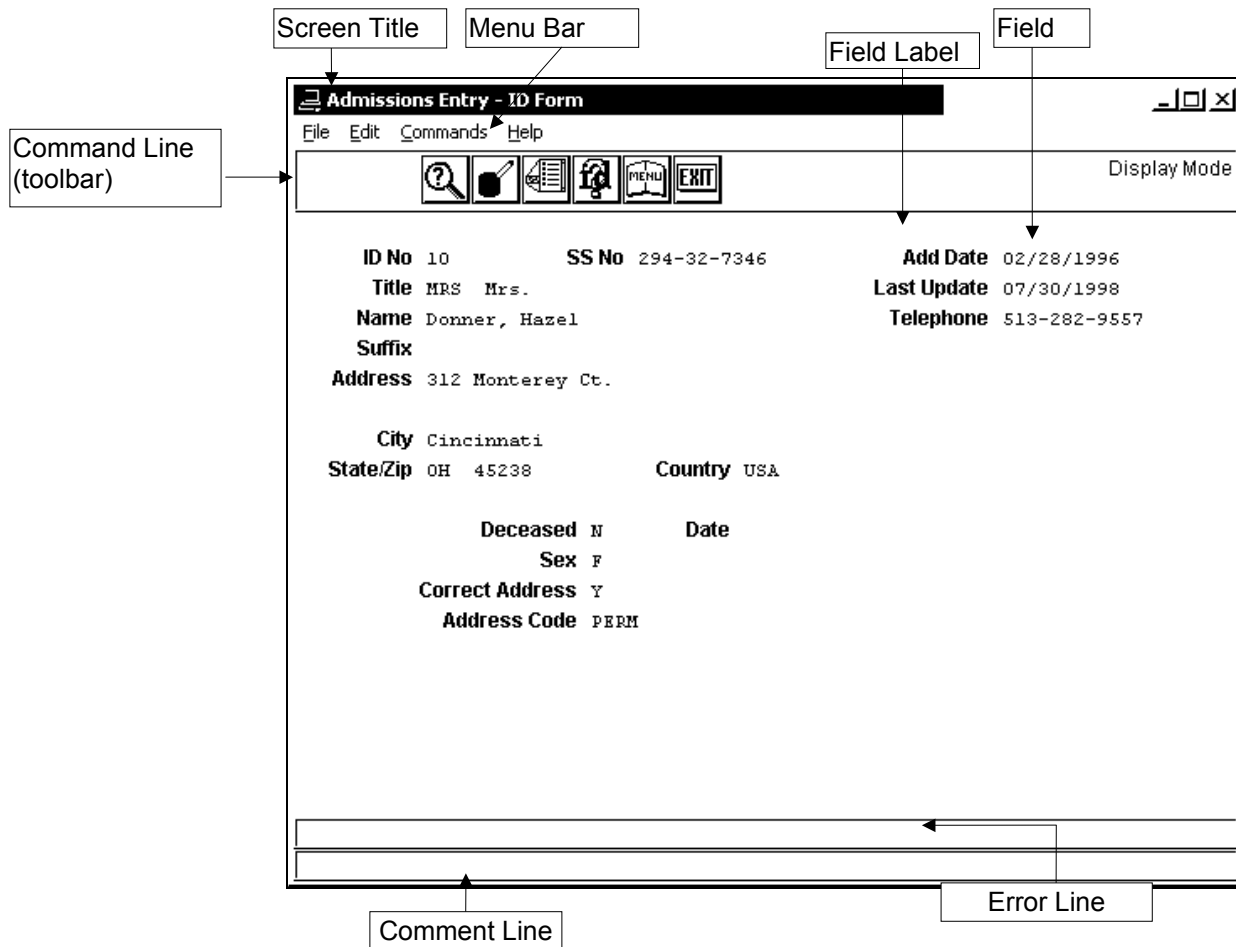
The navigational aid on Web pages and Visual Basic frames that enables you to scroll through information that does not fit on the initial display. Scrollbars can be either vertical to let you navigate through all the elements on a list, or horizontal to let you see all the information about a selected record.

Toolbar

The row at the top of the GUI screen, Web page, or Visual Basic frame that contains command buttons and icons. It replaces the command line on character-based screen formats.

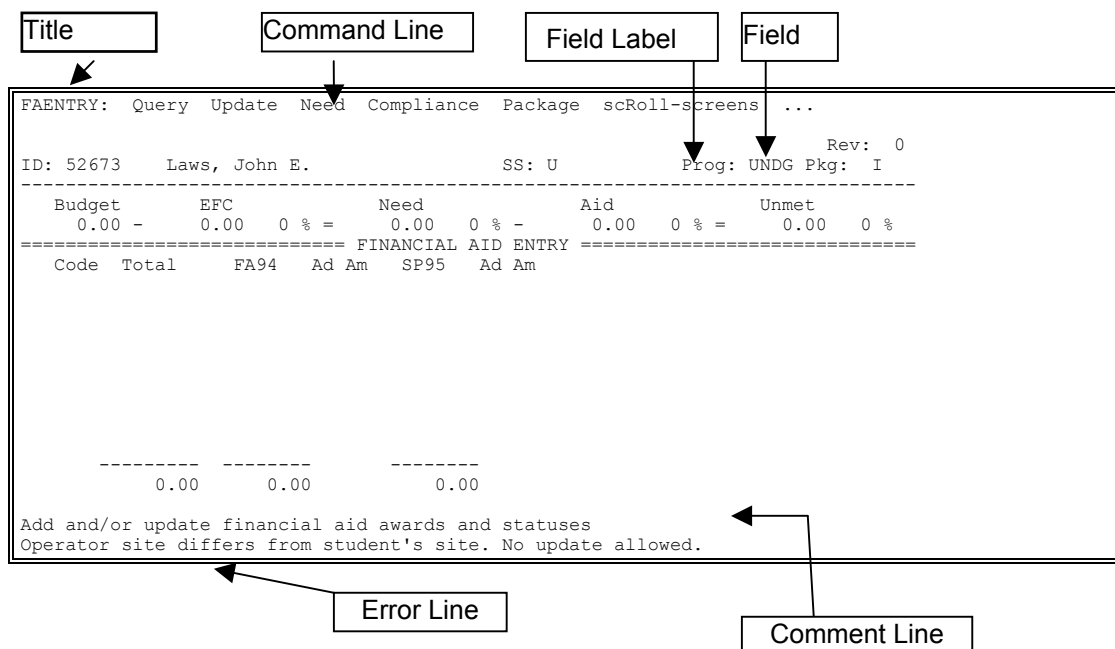
GUI-Based Screen Example

The following GUI-based screen from the Recruiting and Admissions program demonstrates common screen components.



Character-Based Screen Example

The following character-based screen from the Financial Aid Entry program demonstrates common screen components.



Web Page Example

The following Web page from the Institutional Advancement module contains some of the common elements of Jenzabar Web-based applications.

The screenshot shows a web browser window displaying the Jenzabar 'Planned Giving' page. The browser's address bar shows the URL: `http://carsdev:9046/cgi-bin/ia/frame.cgi`. The page features a left-hand navigation menu with buttons for 'Constituent', 'Campaign', 'Planned Giving', 'Grantsmanship', and 'Reporting'. The main content area displays information for 'The Smith Foundation' (ID: 4) and a table of gift annuity details.

Callouts on the left side of the image identify the following elements:

- Command menu:** Points to the browser's menu bar (File, Edit, View, Favorites, Tools, Help).
- Toolbar:** Points to the browser's navigation toolbar (Back, Forward, Home, Search, Favorites, History).
- Command buttons:** Points to the navigation buttons in the left sidebar.
- Field Label:** Points to the 'Status Code' label in the table.
- Field:** Points to the 'Ben1 ID' field in the table.

The 'Planned Giving' section includes the following data:

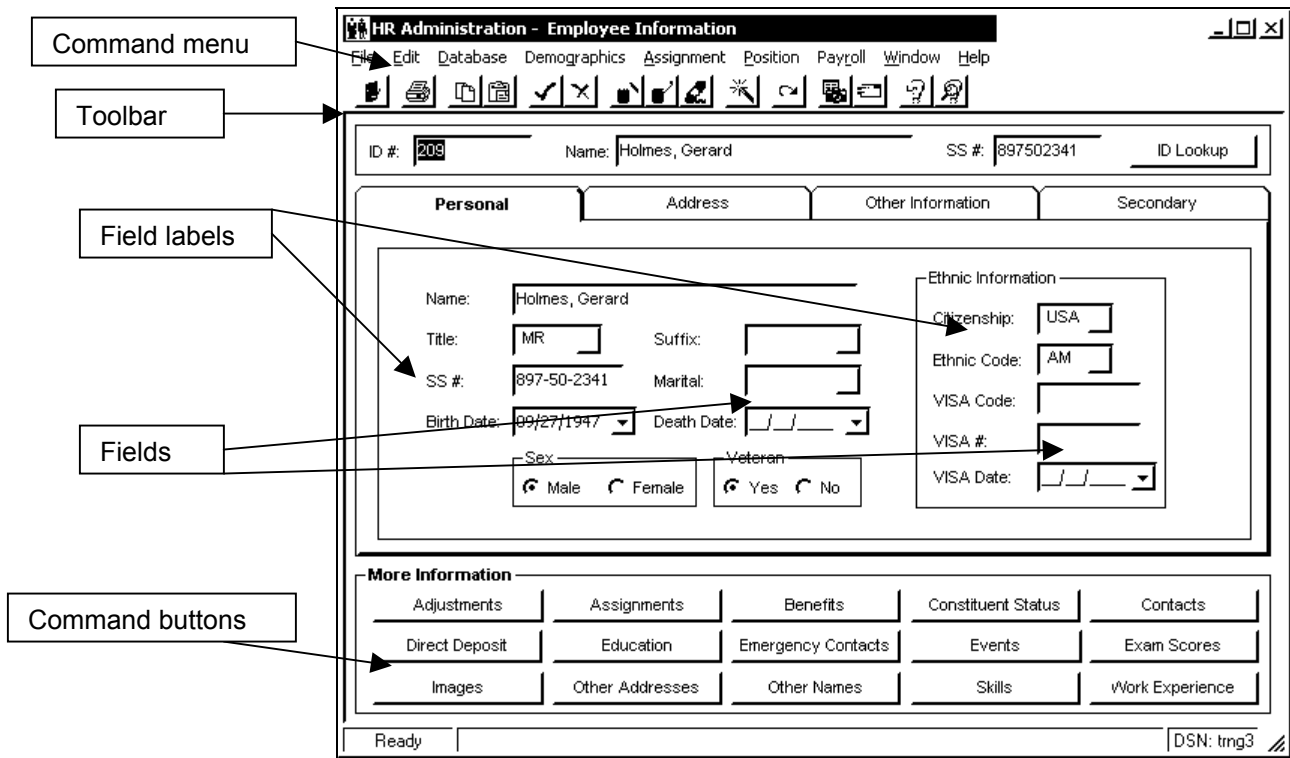
Constituent: The Smith Foundation ID: 4
 Rt 41bx 12 Rose Dr.
 Apt. 4a
 Grove City, OH 43123
 614-875-2987

Table:

Gift Annuity	Annuities	Pldg No.	
Type Code	Charitable Gift Annuity	Face Amount	\$100.00
Revocable	No	Original Amount	\$0.00
Agree Name	Because We Care	Curval Amount	\$10,000.00
Status Code	Likely in 1 Year	Curval Date	02/07/2003
Status Date	11/23/1976	Percentage	0.05%
Ben1 ID	Robinson, Victor Chung	Pay Amount	\$235.00
Ben2 ID	Akin, Melvin Edward	Pay Period	Annual
Contract	abc1234de	Cum Res Amount	\$3,465.00
Contract Date	02/18/2003	Reserve Amount	\$3,456.00

Visual Basic Frame Example

The following Visual Basic frame from the Human Resources Administration application contains some of the common elements of Jenzabar Visual Basic products.



Using the Command Line

Introduction

The purpose of the command line is to list the commands available on the current screen and the corresponding key entries that you use to instruct the system to carry out each command. The command line also sometimes contains the name of the program or the screen.

Command Lines (Toolbars) On GUI-Based Windows

Command lines (toolbars) appear at the top of GUI-based windows and contain buttons that activate the commands. A description of the commands appears when you move your cursor over the icons.

Some buttons contain pictures or graphics that represent the command, while other buttons contain a textual description of the command.

GUI-based windows use the same commands as the character-based screens, but may require different keystrokes to invoke the command.

Command Line Example

One example of a command line appears in *Using Standard Screens* in this section. Following is another example of a character-based command line. Note that each command keystroke accompanies the command name on this type of command line.

```
F1 Execute CTRL-C cancel CTRL-F scroll forward CTRL-B scroll back
<CR> next record
```

How To Use the Command Line

Jenzabar user guides identify commands and options by name rather than by letter or icon. This table lists some examples of how you should respond, according to what you see on the screen and what you read in this guide.

“F1 Execute.” appears on the terminal display, or “Execute” appears next to an icon on a GUI-based command line

The user guide states “Select **Execute**”

- In character mode, press **<F1>**.
- In GUI mode, click on the Execute icon (you can also press **<F9>** in GUI mode to select Execute).

“CTRL-C cancel.” appears on the terminal display, or “Cancel” appears next to an icon on a GUI-based command line.

The user guide states “Select **Cancel**”

- In character mode, press the **<Ctrl>** and **c** keys at the same time.
- In GUI mode, click on the Cancel icon (you can also press **<Esc>** in GUI mode to select Cancel).

“Tab Locate.” appears on the terminal display, or “Locate” appears next to an icon on a GUI-based command line.

The user guide states “Select **Locate**”

- In character mode, press **<Tab>**.
- In GUI mode, click on the Locate icon.

Using the Ring Menu

Introduction

Some screens in the character-based system feature ring menus for commands instead of a command line. Ring menus are similar to command lines, but contain ellipses (...) to indicate that there are more commands in a particular direction. In other words, not all the commands you can use on a particular screen appear on the screen at any one time, but you can easily access the commands that do not appear by moving your cursor to the command next to the ellipses, then moving it one more position toward the ellipsis with the arrow keys.

Since it is always a single line, the ring menu minimizes the amount of space the commands occupy on the screen.

Note: When you use QuickMate, your screen displays do not contain ring menus. View and select commands in one of the following ways:

- Use the buttons and icons to select commands, positioning your cursor on the icons to view a brief description of the command.
- Click on **Commands** on the menu bar to display a list of the commands you can use.

Ring Menu Example

Following is an example of a ring menu from the Financial Aid Need Analysis program screen:

```
FANEED: Query Add Update Need Detail Method copY Print Calculate ...
```

The cursor is on the ring menu. Move the cursor to **Calculate**, then move it one more space, to see more commands like this:

```
FANEED: ... Text Initialize Site TAB Locate CTRL-F Next page ... ..
```

The ellipses on both ends of this line indicate that additional commands exist *before* the **Text** command and *after* the **Next page** command. If you move the cursor to **Next page**, then move it one more space, you can see the last commands in the example ring menu, like this:

```
FANEED: ... CTRL-B Previous page Exit
```

Since the commands are on a continuous ring, you can move the cursor to **Exit**, then move it one more space, to see the first commands, like this:

```
FANEED: Query Add Update Need Detail Method copY Print Calculate ...
```

Hot Keys

A *hot key* is the capitalized and highlighted letter of a command, such as the “E” in Exit, or the “Y” in copY. Hot keys are one method of executing a command.

How To Select A Command

You can select a command from a ring menu in one of these two ways:

- Move the cursor to the command you want, then press **<Enter>**.
- Press the hot key for the command.

Using the Command Pull-Down Menus

Introduction to Pull-Down Menus

Jenzabar CX's graphical screens have menu bars. The menu bar typically contains the standard GUI options, including File, Edit, Commands, and Help, and may contain other options as well depending on the application. When you click on the option, a pull-down menu of commands related to the option appears.

When you click on the drop-down elements on the menu bar of a GUI screen, you display all the commands or features you can access or use on the screen. The commands vary, depending on the screen that you are using, and the program mode in which you are processing. To execute a command, you can use your mouse to highlight the command, and then click.

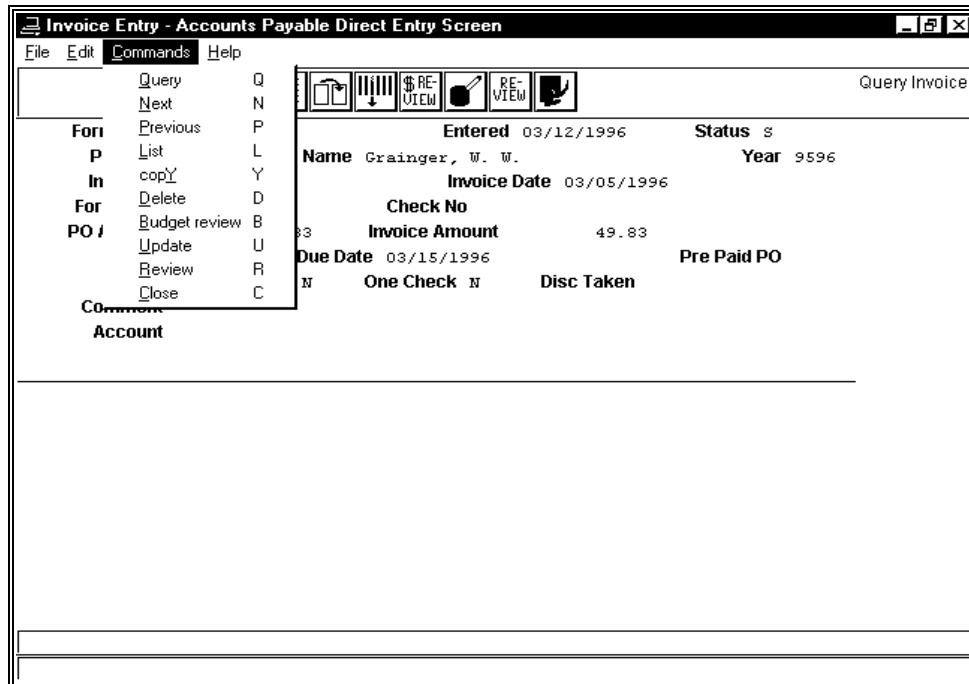
The pull-down menus also display the keystroke(s) (if applicable) that you can use to execute commands if you prefer keyboard input to mouse point-and-click command selection.

Example of the Commands Pull-Down Menu

Following is an example of a Commands pull-down menu from the Financial Aid Need Analysis program. In this example, the command line contains the same commands that appear in the Commands pull-down menu, and the pull-down menu overlays a part of the command line (only the Finished and Cancel icons appear on the screen when you select the Commands pull-down menu).

In this example, you can select each command in three ways:

- Click on the icon (e.g., the Finished icon).
- Click on the command on the Commands pull-down menu (e.g., "Finished").
- Use the keystroke that appears on the Commands pull-down menu (e.g., <Enter>).



Command Keystrokes in Character-based and GUI-based Screens

Introduction

Because GUI applications reserve certain function and control keys normally used by the character-based applications, the keystrokes that you use to enter commands in GUI-based screens and character-based screens may differ. The keystrokes listed in this section relate only to the Jenzabar CX program screens, and typically not to PERFORM screens, Web pages, or Visual Basic frames.

Keystroke Comparison List

The following is a list of the commands with their respective GUI- and Character-based keystrokes.

Abort/Cancel

GUI: <Esc>

Character: <Ctrl-c>

Add a line

GUI: Add Line (or <Ctrl-o>)

Character: <Ctrl-o>

Context-sensitive help

GUI: <Shift-F1>

Character: N/A

Delete a line

GUI: Del Line (or <Ctrl-e>)

Character: <Ctrl-e>

Done/Execute/Finish

GUI: <F9>

Character: <F1>

Exit/Bye

GUI: E (or B)

Character: E (or B)

Fast Back

GUI: Page Down (or <Ctrl-b>)

Character: <Ctrl-b>

Fast Forward

GUI: Page Up (or <Ctrl-f>)

Character: <Ctrl-f>

Field level help

GUI: <Ctrl-F1>

Character: N/A

Next field

GUI: <Tab>

Character: <Enter>

Program-defined key

GUI: <F8>

Character: <Ctrl-v>

Program-defined, GUI-based help

GUI: <F1>

Character: N/A

Query/Lookup

GUI: <F6> (<Ctrl-t>)

Character: <Ctrl-t>

Restore previous value

GUI: <F7> (<Ctrl-p>)

Character: <Ctrl-p>

Tab (program-defined)

GUI: <F3>

Character: <Tab>

UNIX program-based help

GUI: <Ctrl-w>

Character: <Ctrl-w>

Using PERFORM Screens

Introduction

PERFORM screens are a basic feature of the Informix database software, the database used by the system. Because the screens use a standard feature of Informix, they do not contain the same features as CX program screens, (e.g., PERFORM screens exist in character-based format only, and they do not provide table lookup capabilities).

Although the contents of PERFORM screens can vary, the command lines are the same.

Uses of PERFORM Screens

Jenzabar uses PERFORM screens for two primary purposes:

- For the entry of table information.
- For completion of queries that require information about more than one person or record, (e.g., when you need to obtain counts of individuals for whom a particular record exists on the CX database). You use PERFORM screens for this type of query when you select Query by Form from the CX menu.

PERFORM Screen Example

Following is an example of a PERFORM screen.

```
PERFORM:  Query Next Previous View Add Update Remove Table Screen ...
Searches the active database table.                               ** 1: ctc_table table**

                                CONTACT TABLE

Code.....[          ]
Description..[          ]
Tickler     [          ]
Comm Code...[          ]
Routing.....[ ]
Span Waived [ ]
Reissued....[ ]
Ace Report  [          ]
Run Code....[          ]
Bulk Mail...[ ]

Document Tracking Type..[ ]
Enrollment Status.....[ ]
```

Contents of PERFORM Screens

A PERFORM screen can contain more information than can display on the terminal at one time. For example, the Charge/Assessment tables in Student Billing occupy two terminal screens. It also may involve more than one table in the database. For example, the General Ledger PERFORM screens provide access to the Fund table, the Function table, the Object table, and the Subfund table.

Commands To Use for Multiple Screens of Information

You must use the Screen command to view the second (and subsequent) screen of information, and the Table command to sequentially access the tables that appear on a single screen.

Ring Menus for Commands

The command line on the PERFORM screen is a *ring menu* of commands. A command ring menu occupies only one line on the terminal display, and contains an ellipses (...) to indicate that there are more commands in a particular direction. For more information about ring menus see *Using the Ring Menu* in this section.

PERFORM Screen Commands

The following commands appear on the command line of every PERFORM screen. If the command is not applicable to a particular screen, the system displays an appropriate message when you select the command.

Add

Enables you to add an entry to the table.

Keystroke: a

Current

Displays the current record from the current table.

Keystroke: c

Detail

Displays the current record from the next detail table.

Keystroke: d

Note: This command is used on screens where a master/detail relationship exists between tables. For example, a number of detail Department records might exist for a single master Division record. To change a detail record, first locate it with a query, then switch to the related detail record by pressing **d**. When the correct detail record appears on your terminal, you can update or remove it.

Exit

Enables you to exit from the PERFORM screen.

Keystroke: e

Note: To exit from the screen, you must not be in query, add, or update mode.

Master

Displays the current record from the master table.

Keystroke: m

Note: This command is used on screens where a master/detail relationship exists between tables. For example, a number of detail Department records might exist for a single master Division record. To change a master record, switch to the master record by pressing **m**, then locate the record you want with a query. When the correct master record appears on your terminal, you can update or remove it.

Next

Displays the next record that matches your query search criteria. For example, if you do not limit your query to certain values, the system will locate all the table entries, and you can view them sequentially with this command.

Keystroke: n

Output

Enables you to route the screen contents to a file. When you use this command, the system displays the following prompts:

- *Enter output file*: Enables you to specify the name of the file to which you want to route the output.
- *Append or create*: Enables you to specify if you want to add the screen output to an existing file or to create (or overwrite) a file.
- *Current list or One page*: Enables you to specify if you want to route the entire group of selected table values to the file, or only the page that currently appears on the screen.
- *Unload-format or Screen-format*: Enables you to specify if you want the output file to contain the screen layout and labels, or just the data that appears on the screen.

Previous

Displays the previous table entry that matches your query search criteria. For example, if you do not limit your query to certain values, the system will locate all the table entries, and you can view them sequentially (in reverse order, last to first) with this command.

Query

Enables you to enter search criteria and display all the table entries that match your criteria (or enter no search criteria to view all values in the table). For example, if you enter "9394" in a year field for a table, the system will locate all the table entries for that year.

Remove

Enables you to delete a table entry. To delete an entry, you must first query to locate the record, then press **r**. The command line confirms that you want to delete the entry with the following prompt:

REMOVE: Yes No.

Confirm your choice in either of the following ways:

- Use your arrow keys to highlight your choice, then press **<Enter>**
- Press **y** or **n**

Screen

Displays the next screen of information from the current table.

Table

Accesses the next table for this screen.

Update

Enables you to change the information in a table entry. To update an entry, you must first query to locate the record, then press **u**. Use arrow keys, **<Tab>** or **<Enter>** to move the cursor to the field that you want to change. When you have changed all the fields that you want to update, select the command **Changes data** or **Execute**.

View

Displays the binary large object (BLOB) field associated with the table entry.

Note: BLOB fields are files attached to some records that enable you to enter unlimited text about the record contents. You can use a text editor to enter the text.

Using PERFORM Screens for Table Maintenance

Table Maintenance is an important part of maintaining and updating Jenzabar CX. All CX technical manuals include specific instructions for maintaining your tables through the Table Maintenance option available in these main menus:

- Alumni Association
- ADP
- Development
- Donor Accounting
- Fiscal Management
- Public Relations Recruiting/Admissions
- Registrar
- Student Management
- Student Placement
- System Management
- Utilities

These main menus offer Table Maintenance options so that your institution can customize your implementation of the system. You can also use Table Maintenance for continued updates, changes in table information (e.g., tuition, policies, procedures, degrees, etc.), and annual or future changes that are inevitable. You will use PERFORM screens and the PERFORM screen commands from this section to maintain your tables.

Using Program Screens

Introduction

In addition to PERFORM screens, CX contains a large number of entry and program screens. The program screens provide the following features:

- You can search alternate address files for names as well as the basic ID record.
- You can perform *Soundex* searches that locate records with alternate or similar spelling (e.g., if you search for John Smith, a Soundex search will locate a record for Jon Smyth).
- You can use table lookup to view and select valid values for completing a field.

Program Screen Example

Following is an example of a program screen in GUI format. This example screen enables Admissions office personnel to enter information about a prospective student who has submitted an inquiry. This program screen is called an *entry* screen. Entry screens typically are modified to resemble forms that your institution uses. They use the structure and have the same general appearance as all program screens in the system, (e.g., the top two lines of the screen contain command and prompt information, and the right end of the second line indicates the mode) in which the screen currently operates. The commands and prompts change as the mode changes.

The screenshot shows a window titled "Admissions Entry - ID Form" with a menu bar (File, Edit, Commands, Help) and a toolbar with icons for checkmark, close, print, and help. The main area contains a form with the following fields:

ID No	9479	SS No	326-19-6887	Add Date	
Title	MR	Mr.		Last Update	
Name	Davis, Jack			Telephone	
Suffix					
Address	2433 Pioneer Pike				
City	Lexington				
State/Zip	TN	38351	Country	USA	
Deceased	N	Date			
Sex	M				
Correct Address	Y				
Address Code	PERM				

At the bottom of the window, there is a prompt: "Enter social security number. Format: ### ## ####".

Callouts from the text above point to the following elements in the screenshot:

- Finish**: Points to the checkmark icon in the toolbar.
- Cancel**: Points to the close icon in the toolbar.
- Detail Windows**: Points to the print icon in the toolbar.
- ID Type**: Points to the help icon in the toolbar.

Program Screen Commands

Program screen commands vary with the purpose of the screen and the mode of operation in which you are using the screen. For example, the ID Entry screen in update mode displays and accepts different commands than the ID Entry screen in query mode. Program screens (e.g., the Financial Aid Entry screen from which you execute financial aid processes) display and accept commands that relate to the processes you can execute. For more information about common commands and modes of operation, see *ID Entry and Query Screens* in this guide. For more information about specific program screens, refer to the user guide for the related module.

Common Program Screen Commands

The following lists and describes the commands that you can use on many program screens. Note that on the GUI-format screen, you can access the commands in any of the following ways:

- Pressing the corresponding keys on your keyboard
- Clicking on the icons
- Selecting **Command** from the menu bar and then selecting the desired command from the list of commands that appears

Cancel

Allows you to do any of the following without saving the information you have entered:

- Back out of the current command
- Return to the previous command line
- Return to the previous window

Detail

Displays a window that enables you to view, add, and update multiple-item information, such as student interests and involvements. This command appears after you query a record in an entry window.

Exit

Allows you to exit from the program.

Find ID

Displays a window that enables you to search for identification information on an individual or organization, using name, ID number, and social security number. This command appears when you access query mode in an entry window.

Finish

Communicates to the system that you have completed your data entry or selection.

Help

Displays help about phonetic searches, and the screen, commands and keystrokes.

ID type

Displays a view-only window containing information about an individual or organization associated with your institution. The window contains a variety of logical (Y/N) fields; the values in the fields vary, depending on the types of records that exist in the system for the selected ID.

CAUTION:

- If the student has a Student Enrollment record, the field for Student contains a “Y”.
- If you use the Vendor Entry program to enter the ID record, the field for Business contains a “Y”.

Insert

Allows you to add a new record to the database.

Next

With Previous, allows you to move back and forth between consecutive windows, or between other options that have multiple windows.

Previous

With Next, allows you to move back and forth between consecutive windows, or between other options that have multiple windows.

Update

Allows you to change or modify the record that you queried from the database.

Using Detail Windows

Introduction

Detail records contain variable amounts of information that relate to a specific ID record. An ID record can have as many (or as few) associated detail records as necessary to maintain all available information.

When the system displays detail records on your terminal, they appear in *detail windows*. Detail windows in the GUI format contain the same information as scroll screens in the character format.

Purpose

Detail windows enable you to view or update a variety of types of information that relate to the ID. The relationship between ID records and the related scroll records that appear in the detail windows is *master/subordinate*, or *independent/dependent*, since detail records cannot exist without a relationship to an ID record.

Note: You must be in Update mode before you open any detail windows in order to be able to change or add scroll record information.

Example of Use

A variety of detail windows exist in the system. Examples of detail windows in the Recruiting and Admissions area are: Education, Enrollment Status, Relationships, Exams, Interests, and Involvements.

An additional example is the Involvements Detail window, used primarily in the Recruiting and Admissions, and Institutional Advancement areas.

The Involvements Detail window contains information about all the known involvements or activities of the individual (e.g., President's Club or baseball). If the individual has two involvements, then two Involvement records are linked to the individual's ID record, and two scroll records appear on the detail window. On the other hand, if the individual has twenty involvements, then all twenty appear on the detail window. Because space constraints on the monitor enable you to display three involvements at a time, you use the Forward and Back commands to display the other involvements as desired.

For examples and detailed explanations of some common detail windows including the Involvements Detail window, see the section *Common Screens* in this guide.

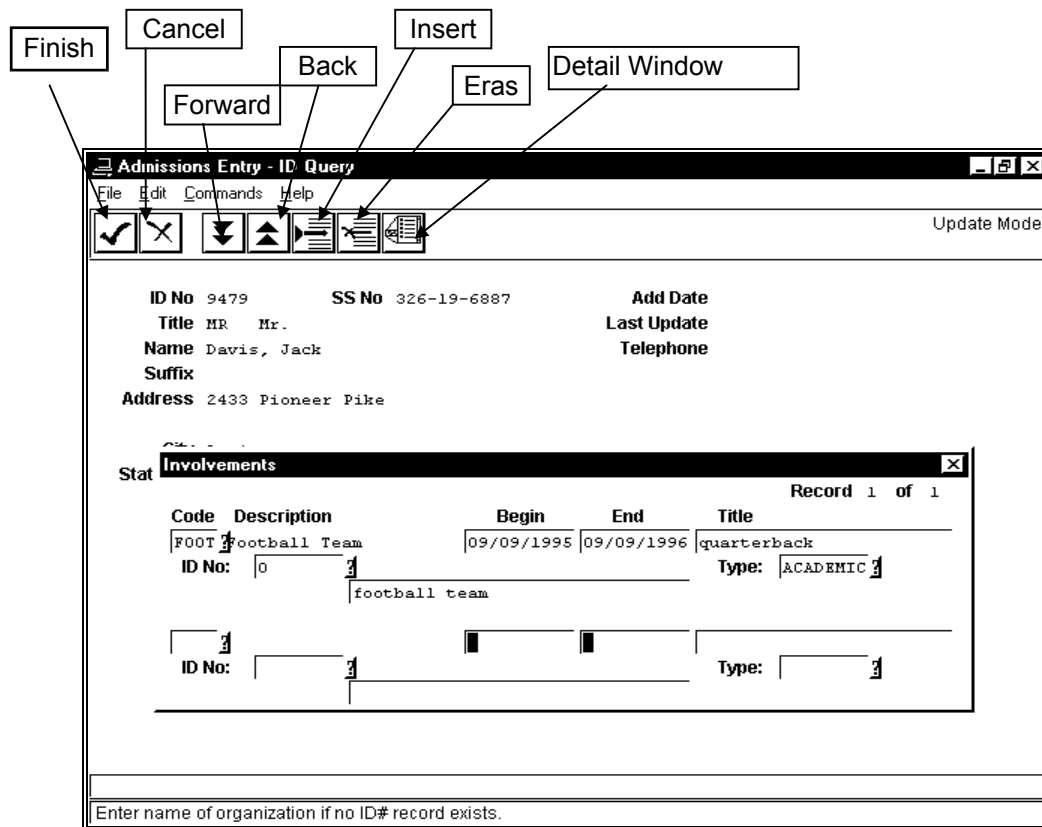
How to Access

You can access detail windows whenever the Detail command appears on the GUI-based window's toolbar or Commands pull-down menu. In character-based format, you can access scroll screens whenever the Scroll command appears on the command line.

When you access a detail window it appears on the lower portion of the program or PERFORM screen. In the upper right area of the window a message such as "Record 1 of 14" indicates what record you are currently viewing, adding, or updating, and how many records exist.

Detail Window Example

Following is a GUI-format example of a detail window in which Admissions office personnel can enter involvement information about a prospective student, along with labels for the commands.



Detail Window Contents

The above detail window example illustrates features of detail windows.

For example, in the upper right corner of the detail window, the screen displays the number of the record that you have currently selected (1), and the number of records that exist for the ID (1).

In addition, the command line options change when a detail window overlays an entry screen or window.

Detail Windows Commands

The following lists and describes the commands you can use on detail windows.

Note: Some detail windows are view-only; you can look at information but not add to it or change it. For example, on the above ID entry screen, you can only view enrollment status information, but you cannot add this type of information. When a detail window is view-only some commands are not active or available for selection.

Add-ID

Allows you to add an ID record for an individual to the system (the Add ID for Individual window appears to enable you to enter and save a record to the database).

Back

Displays the previous screenful of detail records.

Cancel

Discards the changes you entered in the detail window, and removes the detail window display so you can view the entry screen.

(Detail Window) Scroll

Removes the detail window display, and displays the list of available detail windows.

Erase

Deletes the scroll record in which your cursor is located.

Note: Some detail windows are view-only. This command only applies to the types of scroll records that you can add *and* that you have permission to delete.

Finish

Saves the changes you entered in the detail window, and removes the detail window display so you can view the entry screen.

Forward

Displays the next screenful of detail records.

Insert

Opens a line above the point at which your cursor is located, so you can add an additional detail record.

Note: Some detail windows are view-only. This command only applies to the types of detail windows that you can add.

Sort

Allows you to sort records in a detail window alphabetically or in some other specified order.

Toggle

Allows you to switch back and forth between add and insert mode.

Using Pop-up Windows

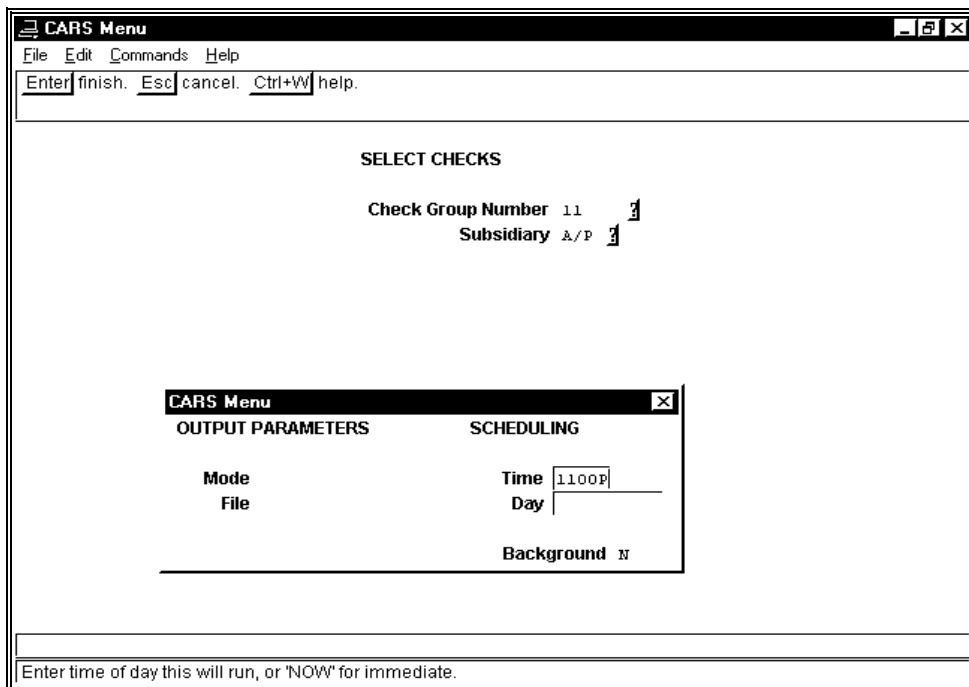
Introduction

Pop-up windows are small displays, usually with frame borders, that partially overlay a larger screen or window, or small displays that appear with other windows on a screen. Some pop-up windows require or enable you to enter information, while others are view-only.

An example of a pop-up window in which you enter information is the Output Parameters and Scheduling window that appears when you execute programs or produce reports. An example of a pop-up window that displays information is the Enrollment Information window.

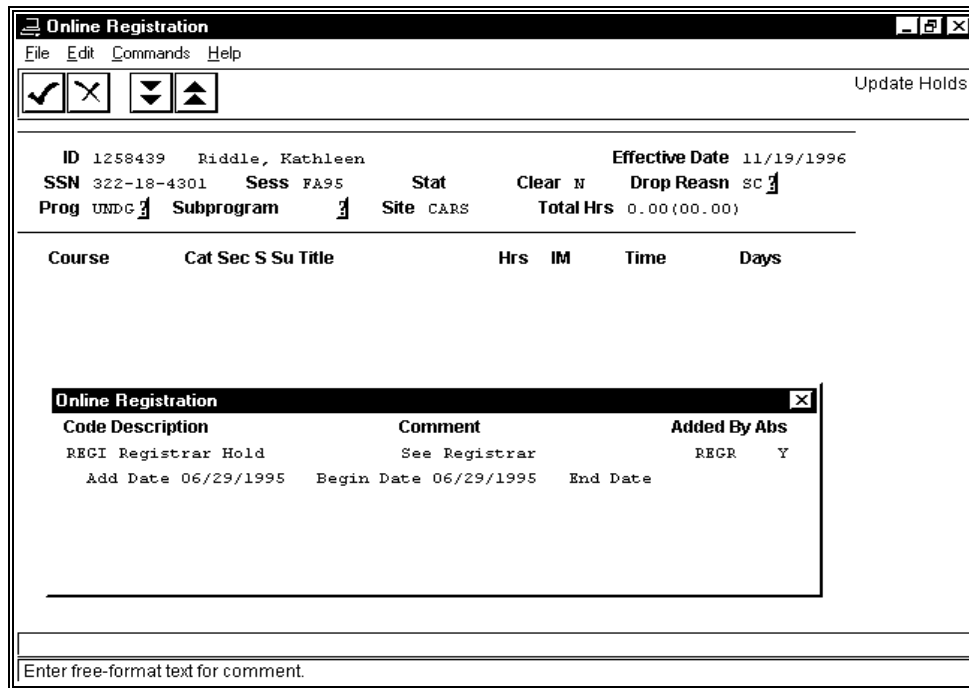
Pop-Up Window Example (1)

The following is an example of the Output Parameters and Scheduling window that appears when you initiate a process in the Fixed Asset module.



Pop-Up Window Example (2)

The following is an example of the Hold window that might appear when you use the Registration module.



Pop-Up Window Commands

The commands that you can use when your terminal displays a pop-up window vary according to the purpose of the window. For example, when the pop-up window is view-only, it may only contain the Cancel command.

When the pop-up window requires you to enter information, it will usually contain the following commands:

Back

Scrolls back through additional pop-up windows of information.

Cancel

Discards the information you entered in the pop-up window, and aborts the process.

Note: For view-only pop-up windows, this command causes the pop-up window display to disappear from your terminal.

Finish

Saves the information you entered in the pop-up window, and executes the process.

Forward

Scrolls forward through additional pop-up windows of information.

Help

Displays information about the process.

Using Jenzabar Web Pages

Introduction

Web pages in Jenzabar CX are the means by which system users can access specific types of data from any PC with Internet access. For example, a high school senior interested in applying to your institution can interface with the CX Recruiting and Admissions module by submitting an application via the Web. Similarly, an enrolled student can register for classes, perform financial aid calculations, or view various types of demographic information about him/herself using any PC. Instructors can enter grades using a CX Web page, and Institutional Advancement officers can review a foundation's giving history. i

Web Page Example

The following is an example of the Web page for Planned Giving, a component of Jenzabar's Advancement Officer product:

The screenshot shows a web browser window displaying the Jenzabar Planned Giving interface. On the left, a vertical navigation menu contains buttons for 'Constituent', 'Campaign', 'Planned Giving', 'Grantsmanship', and 'Reporting'. The main content area is titled 'Planned Giving' and displays information for 'The Smith Foundation' (ID: 4). Below this, a table lists gift annuity details. Callouts on the left identify various UI components: 'Command menu' points to the browser menu; 'Toolbar' points to the browser toolbar; 'Command Buttons' points to the navigation buttons; 'Labels' points to the constituent information text; and 'Fields' points to the table data.

Gift Annuity	Annuities	Pldg No.	66
Type Code	Charitable Gift Annuity	Face Amount	\$100.00
Revocable	No	Original Amount	\$0.00
Agree Name	Because We Care	Curval Amount	\$10,000.00
Status Code	Likely in 1 Year	Curval Date	02/07/2003
Status Date	11/23/1976	Percentage	0.05%
Ben1 Id	Robinson, Victor Chung	Pay Amount	\$235.00
Ben2 ID	Akin, Melvin Edward	Pay Period	Annual
Contract	abc1234de	Cum Res Amount	\$465.00
Contract Date	02/18/2003	Reserve Amount	\$3,456.00

Example of Use

Web pages are used for all functional areas where the end user is not necessarily in a campus office. For example, students, traveling Advancement officers, faculty, and applicants may need to access specific types of information from any remote location. With access to the Web, the users can enter or retrieve their information anywhere.

Using Jenzabar Visual Basic Forms

Introduction

Visual Basic forms are used within the Jenzabar Human Resources PC-based applications only. The forms, typically referred to as screens, are available only to those users on the campus who have installed the Human Resources applications on their PCs.

Visual Basic Form Example

The following is an example of the Employee Information screen, the primary screen in HR Administration:

The screenshot shows a window titled "HR Administration - Employee Information". The menu bar includes File, Edit, Database, Demographics, Assignment, Position, Payroll, Window, and Help. The toolbar contains various icons for file operations and help. The main form area is divided into sections:

- Header:** ID #: 209, Name: Holmes, Gerard, SS #: 897502341, ID Lookup button.
- Navigation:** Personal (selected), Address, Other Information, Secondary.
- Personal Section:**
 - Name: Holmes, Gerard
 - Title: MR, Suffix: []
 - SS #: 897-50-2341, Marital: []
 - Birth Date: 09/27/1947, Death Date: []
 - Sex: Male Female
 - Veteran: Yes No
 - Ethnic Information:**
 - Citizenship: USA
 - Ethnic Code: AM
 - VISA Code: []
 - VISA #: []
 - VISA Date: []
- More Information:** A grid of buttons for Adjustments, Assignments, Benefits, Constituent Status, Contacts, Direct Deposit, Education, Emergency Contacts, Events, Exam Scores, Images, Other Addresses, Other Names, Skills, and Work Experience.

The status bar at the bottom shows "Ready" and "DSN: trng3".

For details about the Human Resources application and its screen features, see its supporting online help.

Using the FPS Screen

Introduction

The FPS (Forms Production System) is a standard screen used with various applications throughout the system that enables you to print form output. It contains several fields in which you enter specific parameter information such as the type of form or the printer you want to use.

Applications that Use the FPS Screen

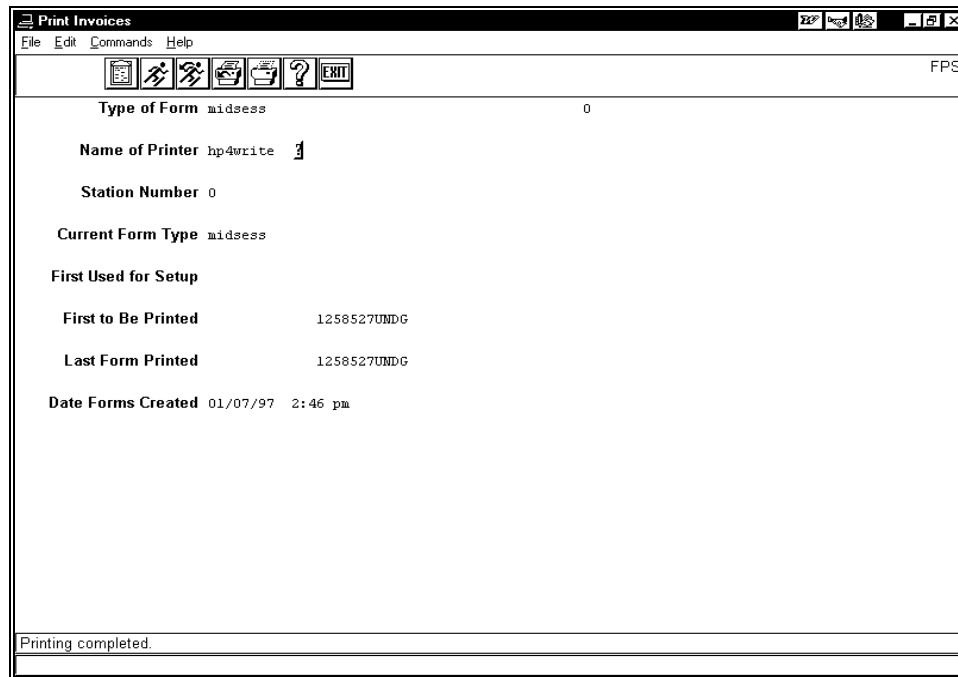
You can access the FPS screen from several applications. The screen title may change depending on the application you are using. Below is a list of examples of applications that use the FPS screen followed by the screen title in that particular application.

- Third Party Billing - Print Invoices screen
- Payroll/Personnel - Print W2 Forms screen
- Check Writing - Print Checks & Grp Sheets screen
- Financial Aid - Print Award Notices screen

Note: The acronym FPS will appear on the far right side of the toolbar line in each screen.

Screen Example

The following is an example of the FPS screen.



Type of Form		midsess	0
Name of Printer		hp4write	
Station Number		0	
Current Form Type		midsess	
First Used for Setup			
First to Be Printed		1258527UNDG	
Last Form Printed		1258527UNDG	
Date Forms Created		01/07/97	2:46 pm

Printing completed.

Screen Fields

The following describes the fields on the FPS screen.

Current Form Type

Display only. The type of form that is currently loaded in the printer (e.g., invoice).

Date Forms Created

Display only. The date (mm/dd/yyyy) and time the forms were produced.

Example: 09/15/1995 3:24 pm

First To Be Printed

Display only. The document number of the first invoice to be printed for the specified station.

First Used for Setup

Display only. The next number associated with the form type. The system assumes this form number will be used for forms alignment.

Last Form Printed

The number of the last form printed. This field continuously updates, however, you may manually enter a value in this field by choosing Restart from the Command menu.

Name of Printer

The name of the printer that prints the forms. Use Table Lookup (F6) for a list of valid codes.

Station Number

The station number where the forms are produced. The default value is zero (0), which tells the system that the station number is irrelevant. Unless told otherwise, use the default.

Type of Form

The type of form that is printed. If blank, the system assumes you are using regular printer paper. Use Table Lookup (F6) for a list of valid codes.

Example: Invoice

Screen Commands

The commands that appear on the FPS screen command line and their purposes are the following.

Again

Enables you to print a second copy of previously printed forms, using the original form or check numbers.

Draft

Enable you to print voided forms in draft mode on blank paper.

Note: This command does not require or print document numbers.

Exit

Enables you to exit to the System menu.

Formtype

Lets you enter the form type, printer name, and station number that you want to use.

Help

Enables you to view program command and control key descriptions.

Restart

Lets you enter the number of the last form type so you can continue printing an interrupted print run.

Start

- Lets you enter the number for the first form you want to print.
- Loads all the files for the specified form type.

Printing Forms with the FPS Screen

The following is the procedure for printing forms from the FPS screen.

Note: You may also reprint gift receipts using the **Again** option on the Commands menu. For background information and the procedure for reprinting gift receipts see the section *Reprinting Gift Receipts in Using Alumni/Development*.

1. Access the FPS screen.
2. Select **Formtype**. The cursor moves to the Type of Form field.
3. Enter type of form to be printed (e.g., classlist, final, or midsess) then press **<Tab>**. The cursor moves to the Name of Printer field.
4. Enter the name of the printer (e.g., lpt) you want to use to print the forms, then press **<Tab>**. The cursor moves to the Station Number field.
5. Enter the station number or accept the default, 0.
6. Select **Finish**. The system displays the following prompt in a window: "Please load the 'formtype' forms into 'printer name'."

Note: You may also select **Draft** if you wish to print voided forms in draft mode.

7. Load the correct form in the printer and select **Loaded**. The formtype occurs in the Current Form Type field.
8. To start a new print run go to step 12, to restart an interrupted print run go to step 9.
9. Select **Restart**. The cursor moves to the Last Form Printed field.
10. Enter the number of the last form printed in the interrupted print run and press **<Tab>**. The cursor moves to the second Last Form Printed field.
11. Enter the ID number of the student whose form was last printed and press **Enter**. Go to step 13.
12. Select **Start**. The date and time the forms were created appears in the Date Forms Created field of the FPS screen, the first form to be printed appears in the First to be Printed field of the FPS screen, and the system displays the following prompt in a window: "Are forms correctly aligned?"
13. Are the forms correctly aligned?
 - If yes, select **Yes**.
 - If no, select **No**, then align the forms correctly
 - If you want to skip, select **Skip**.
14. The system displays the following prompt in a window: "Begin printing or Skip this form."
15. Do you want to begin printing the forms?
 - If yes, select **Print**. The form prints, and the message "Now printing..." appears in the message bar.
 - If no, select **Skip**.
16. Select **Exit**. The system displays the prompt, "Are you sure you want to exit?"
 - If yes, select **Yes**. The menu appears.
 - If no, select **No**. The previous screen appears.

SECTION 4 - USING COMMON SCREENS

Overview

Introduction

This purpose of this section is to show screens that display throughout the system across modules and applications. These screens are not specific to one part of the product, therefore, you may use them in two or more applications or modules. This section provides a quick reference of the commands and options you use to perform procedures related to the particular screen.

Refer to this section when you have questions about a specific field, command, or when you are completing procedures.

Screen Differences

The screens and windows in this section represent those contained in the Jenzabar standard product in GUI format. If your institution changes these screens and windows to meet its specific needs, then your screens and windows will look different from those shown in this section. Your screens will also look different if you use the system in character-based format.

Organization

The screens, field names and commands appear in alphabetical order in this section, unless otherwise noted.

Commands

The commands on the CX screens change, depending on procedures you perform or commands you have previously selected. For more information about the commands, see *Section 3 - Using Screen Displays and Commands* in this guide.

Accomplishments Detail Window

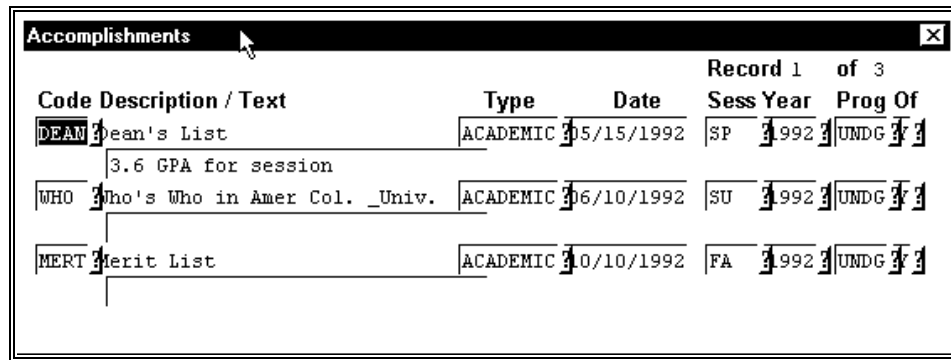
Purpose

This detail window enables you to enter awards and/or titles. Depending on the policy of your institution, this can reflect awards and/or titles received at the student's current institution and/or at previously attended institutions.

Each Accomplishment record on this detail window contains information for one accomplishment. Therefore, if you enter three accomplishments for a student, that student will have three separate Accomplishment records.

Example

Following is an example of the Accomplishments Detail window.



Code	Description / Text	Type	Date	Record 1 of 3	Sess Year	Prog Of
DEAN	Dean's List 3.6 GPA for session	ACADEMIC	05/15/1992	SP	1992	UNDG
WHO	Who's Who in Amer Col. Univ.	ACADEMIC	06/10/1992	SU	1992	UNDG
MERT	Merit List	ACADEMIC	10/10/1992	FA	1992	UNDG

Fields

The following list describes the fields that appear on the Accomplishments Detail window .

Code

A code that indicates the award and/or title (e.g., DEAN for Dean's List or HONR for National Honor Society).

Date

The date (mm/dd/yyyy) that indicates when the student received an award and/or title.

Description / Text

A description of the code in the Code field (e.g., Dean's List 3.6 GPA for session). The first line of text appears automatically and describes the code; the second line contains text that you type to provide additional information about the code.

Prog

A code that indicates the program under which the student received an award and/or title (e.g., UNDG for undergraduate program).

Sess

A code that identifies the session during which the student received the award and/or title (e.g., FA for Fall).

Type

A code that identifies the type of award and/or title (e.g., ACADEMIC or ATHLETIC) received.

Year

The year in which the student received the award or title.

Commands

The following list describes the commands you can execute from the Accomplishments Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you move forward through a list of records.

Scroll

Updates the detail window information.

Church Form Screen

Purpose

The Church Form screen allows you to view, add, and update constituent information for a church.

Example

Following is an example of the Church Form screen.

Fields

The following is a list of fields that appear on the Church Form screen and their descriptions.

Add Date

The date the system added the ID record to the database. A display-only field, the system enters this information.

Address

The church's permanent address appearing in the church's ID record. You can enter up to two lines of address information.

Budget

The church's annual budget (e.g., \$120000.00).

(Budget Due Date)

This is an unlabeled field located to the right of the Review field. The date (mm/dd/yyyy) the church's annual budget is due.

City

The city of the church's permanent address appearing in the church's ID record.

Country

The country of the church's permanent address appearing in the church's ID record (e.g., USA for the United States). Use **Table Lookup** for a list of valid countries.

Denom

A code identifying the church's denomination (e.g., BPST). Use **Table Lookup** for a list of valid codes. The system enters the description of the code to the right.

Effective Date

The date (mm/dd/yyyy) the number of church members was effective.

Fed. ID No

The church's federal ID or social security number appearing in the church's ID record (e.g., 225-55-8888).

ID No

The system-generated number identifying the church in the database.

Last Update (upper field)

The date the ID record was last updated by the system or a user. A display-only field, the system enters this information.

Last Update (lower field)

The date the Church record was last updated by the system or a user. A display-only field, the system enters this information.

Membership

The number of church members.

Name

The church's name.

Review

The month the church's budget is reviewed.

State/Zip

These are two fields. The first field is the two-letter state abbreviation and the second field is the zip code of the church's permanent address appearing in the church's ID record. Use **Table Lookup** for a list of valid states and zip codes.

Telephone

These are two fields. The first field is the church's permanent telephone number appearing in the church's ID record (e.g., 505-872-9283). The second field is the church's extension number, if necessary.

Commands

The following is a list of the commands you can execute from the Church Form screen and their purposes.

Note: You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Auto-Mode

By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

Cancel

In Insert, Query, and Update modes, does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

Close

Enables you to close the ID Types/Associated Records window.

Detail

In Display, Insert, and Update modes, displays the Detail windows enabling you to select multiple-item information, or records, associated with the ID number.

Display ID

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

Exit

Enables you to quit the program and return to the menu.

Find ID

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, social security number, etc.) and narrow the search for an ID record.

Finish

In Insert and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

Finished

Enables you to close the ID Types/Associated Records window.

ID-Type

In Display, Insert, Query, and Update modes, displays the view-only ID Type/Associated Records window containing information about the church. The window contains a variety of logical (Y/N) fields; the codes in the fields vary, depending on the types of records that exist for the church. For example:

- If the church has a Donor record, the Donor field contains Y
- If the church has a Constituent record, the Constituent field contains Y

Insert

Puts the screen into Insert mode. Enables you to add a new record.

Note: This command appears after you select **Query**, then **Find ID**. At the ID Query screen, select **Cancel** to return to the Church Form screen.

Menu

Returns you to the initial Forms menu. Enables you to select another form.

Query

Puts the screen into Query mode. Enables you to query on an ID or social security number.

Select

In Query mode, enables you to select the ID or social security number entered and searches for the associated ID record.

Update

In Query mode, puts the screen into Update mode. Enables you to update the record(s).

Contacts Detail Window

Purpose

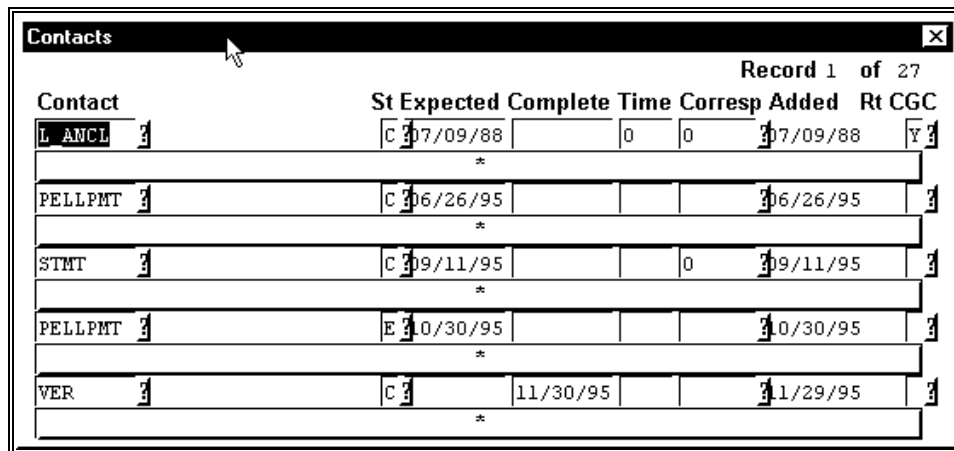
The Contacts Detail window enables you to enter and track incoming and outgoing correspondence, or contacts, between your institution and a student being recruited.

The following are examples of the types of contacts you can add and update:

- A phone call a student makes inquiring about your institution
- A letter your institution sends a student confirming a campus visit
- An application a student sends your institution
- An acceptance letter your institution sends to a student
- A deposit for tuition a student sends your institution
- Each Contact record contains information about one contact. For example, if you enter three contacts for a student, that student has three, separate Contact records. The Contacts Detail window can display up to six records at a time.

Example

Following is an example of the Contacts Detail window.



Contact	St	Expected	Complete	Time	Corresp	Added	Rt	CGC
L ANCL	C	07/09/88			0	0	07/09/88	Y
*								
PELLPMT	C	06/26/95					06/26/95	
*								
STMT	C	09/11/95			0		09/11/95	
*								
PELLPMT	E	10/30/95					10/30/95	
*								
VER	C		11/30/95				11/29/95	
*								

Fields

The following list describes the fields that appear on the Contacts Detail window.

Added

Displays the date your institution added a contact record to the database. You cannot change this field.

Note: This date defaults to today's date when you are entering data on this screen.

CGC

Either **Y** (Yes) or **N** (No) specifying whether the contact is a computer-generated contact (CGC) rather than a contact created by an individual. A blank indicates No.

Contact

A code and corresponding text indicating either of the following:

- The type of incoming correspondence your institution expects to receive or has already received from a student
- The type of outgoing correspondence your institution sends to a student

Example: ACCLET Acceptance letter received; INQRECV Inquiry received

Note: If you select Table Lookup to locate a valid code for this field, notice the letters “I” (incoming) or “O” (outgoing) appear on the far right of the Table Lookup screen to indicate the type of correspondence. After you enter a valid code in the Contact field, the system automatically inserts an “I” or “O” in the Rt field.

Contacted

The date on which your institution received incoming correspondence or sent outgoing correspondence to a student. Use the format mm/dd/yyyy.

Note: Enter a date in this field if the code in the St field is “C”. Otherwise, do not complete this field.

Corresp

The identification number of the institution or individual at the institution (e.g., guidance counselor) with whom your institution corresponds (e.g., 20000).

Due

The date on which your institution either expects to receive correspondence from a student, or on which your institution expects to send correspondence to a student.

Note: Enter a date in this field if the code in the St field is “E”. Otherwise, do not complete this field.

Rt

Displays “I” (incoming) or “O” (outgoing) indicating the routing, or direction, of the correspondence. You cannot change this field.

St

A code indicating the status of incoming or outgoing correspondence.

Example:

- E (Expected) if your institution expects some type of correspondence from a student, such as a high school transcript or a test score.
- C (Completed) if your institution receives the expected correspondence from a student.
- V (Voided) if, for example, a student tells your institution that he or she will attend another institution. Because the student will not send any of the expected correspondence to your institution, change all the “E” codes to “V” in this field.

Note: Once your institution receives all of the appropriate correspondence from a student (i.e., a “C” is in the St field of each contact record for that student), then an admissions committee at your institution determines the student’s admission eligibility.

Time

A time indicating when an Admission representative from your institution will correspond with a student or another institution, such as a high school visit. Use military time; (e.g., 1430 for 2:30 p.m.).

Commands

The following list describes the commands you can execute from the Contacts detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Education Detail Window

Purpose

The Education Detail window enables you to enter academic information that links a student with one or more schools the student attended or currently attends, such as a high school, community college, or four-year college. Each education record contains the name and location of a school and the student's academic information.

Example

Following is an example of the Education Detail window.

ID No	CEEB No	Prog	Deg	Maj1	GPA	Rank/Size	Grad Date	Sess Year
57952	181600		.			5 1217	05/18/1992	1992
Sacred Heart Academy				Springfield			OH HS	PR

Fields

The following list describes the fields that appear on the Education Detail window.

CEEB No

A number that the College Entrance Examination Board has assigned to a school that a student has attended or currently attends (e.g., 181600 for Sacred Heart Academy).

Deg

A code indicating the type of degree a student earned or plans to earn from an institution.

Example: BS for Bachelor of Science

GPA

A student's grade point average at a school the student attended or currently attends (e.g., 3.4).

Grad Date

The date (mm/dd/yyyy) on which a student graduated or will graduate from a school the student attended or currently attends.

ID No

The identification number for a school that a student attended or currently attends.

Example: 57952 181600 Sacred Heart Academy

Maj1

A code indicating the student's major at a school the student attended or currently attends.

Prog

A code specifying the program of a school the student attended or currently attends. Leave this field blank if the institution is a high school.

Example: UNDG for undergraduate program

Rank/Size

Numbers indicating a student's academic class rank and the size of the class at the school the student attended or currently attends.

Example: 51217 to indicate that a student is ranked fifth in a class of 1,217 students

Session

A code specifying the session in which a student graduated or will graduate from an institution.

Example: FA for Fall

Year

The year in which a student graduated or will graduate from an institution.

Commands

The following list describes the commands you can execute from the Education Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Employment/Work Detail Window

Purpose

The Employment/Work Detail window enables you to enter information on any jobs that an individual has held or currently holds. Each record on this screen contains information about one job.

Example

Following is an example of a completed Employment/Work Detail window.

The screenshot shows a window titled "Employment/Work" with a close button (X) in the top right corner. The window displays a table with the following columns: Bus ID, Business Name, Begin, End, Telephone, and Ext. The table contains two records. The first record has Bus ID 20187, Business Name ARS Information Systems, Begin date 05/30/1992, End date 08/15/1992, Telephone 513-563-4542, and Ext field empty. Below the first record, there is a sub-entry: Summer Marketing Intern, COM Computers:Manuf/Sales. The second record has Bus ID 0, Business Name Al's Ice Cream Machine Parlor, Begin date 04/30/1991, End date 08/09/1992, Telephone 513-666-6666, and Ext 123. Below the second record, there is a sub-entry: Supervisor, HTL HotelRest / Resorts. The text "Record 1 of 2" is visible in the top right of the window.

Bus ID	Business Name	Begin	End	Telephone	Ext
20187	ARS Information Systems	05/30/1992	08/15/1992	513-563-4542	
	Summer Marketing Intern		COM	Computers:Manuf/Sales	
0	Al's Ice Cream Machine Parlor	04/30/1991	08/09/1992	513-666-6666	123
	Supervisor		HTL	HotelRest / Resorts	

Fields

The following list describes the fields that appear on the Employment/Work Detail window.

Begin

The date (mm/dd/yyyy) of an individual's first day of employment at a business.

Bus Id

The identification number of a business (e.g., 20187).

Note: If you perform a query to search for the name of a business and find that the business does not exist in the database, type the name of the business in the Business Name field.

Business Name

The name of a business.

Example: Al's Ice Cream Parlor

Note: If information on a business already exists in the database, the system automatically displays the name of the business in the Business Name field when you enter a valid code in the Bus ID field. However, if the information does not already exist, type the name of the business in the Business Name field.

End

The date (mm/dd/yyyy) of an individual's last day of employment at a business.

Ext

The telephone extension number of a business.

Telephone

The telephone number of a business.

Commands

The following is a list of the commands you can execute from the Employment/Work Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

First Relationship Detail window

Purpose

The First Relationship Detail window enables you to enter relationships that exist between individuals and organizations connected with your institution in some way. The First Relationship Detail window contains relationships between any of the following:

- Two individuals
- Two organizations
- An individual and an organization

For example, you can enter a relationship between a parent and a child (who is also a student), or between your institution and a student worker. A relationship important to an Admission office is one between a prospective student and the student's parents, since many institutions send letters to the parents of the students they are recruiting.

The major component of this screen is the relationship ID code that represents the type of relationship for which you are entering information. This code helps you to determine whether you enter information in the First Relationship screen or the Second Relationship screen. The following are examples of relationship ID codes:

- CE for Company/Employee
- MD for Mother/Daughter

Each record on this screen contains information about only one relationship. For example, if you enter two relationships, two separate relationship records will exist.

Which Relationship Screen Should You Use?

Enter information in the First Relationship screen when the left side of the relationship ID code (e.g., the husband in the code "HW" for husband/wife) represents the individual or organization whose record you are currently adding or updating on the entry screen.

Example

Following is an example of a First Relationship Detail window.

Rel ID	Name	Code	Begin	End	Prt Mnt
22465	Doe, Judy	AUI Aunt / Niece	01/01/1976		Y

Fields

The following list describes the fields that appear on the First Relationship Detail window.

Begin

The date on which a relationship began or became known.

Example: 09/10/197x for a student's date of birth, or 09/10/199x for a student's date of hire.

Code

A code indicating the type of relationship between two individuals, two organizations, or an individual and an organization.

Example: CE for Company/Employee, FD for Father/Daughter

Note: Keep in mind that the individual or organization whose record you are currently adding or updating is on the left side of the relationship ID code (e.g., the aunt in the code "AUI" for aunt/niece).

End

A date (mm/dd/yyyy) indicating the last day of a relationship. Leave this field blank if it does not apply to a relationship.

Mnt

Either **Y** (Yes) or **N** (No) specifying whether or not a change in the individual or organization's records on the left side of a relationship should be carried to all existing relationship records.

Name

The name of an individual or organization on the left side of a relationship. The system displays the name automatically when you enter a valid ID number in the Rel ID field.

Example: Doe, Judy for the aunt in the aunt/niece relationship

Print

Either **Y** (Yes) or **N** (No) specifying whether or not the name of the individual or organization on the left side of a relationship should be placed first on correspondence.

Rel Id

The identification number for the individual or organization on the right side of a relationship.

Example: 12345 for Jane Doe in the aunt/niece relationship.

Commands

The following is a list of the commands you can execute from the First Relationship Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Holds Detail Windows

Purpose

The Holds windows enable you to view, add, or update registration *holds*, or unmet obligations, which can prevent a student from registering for courses.

Access

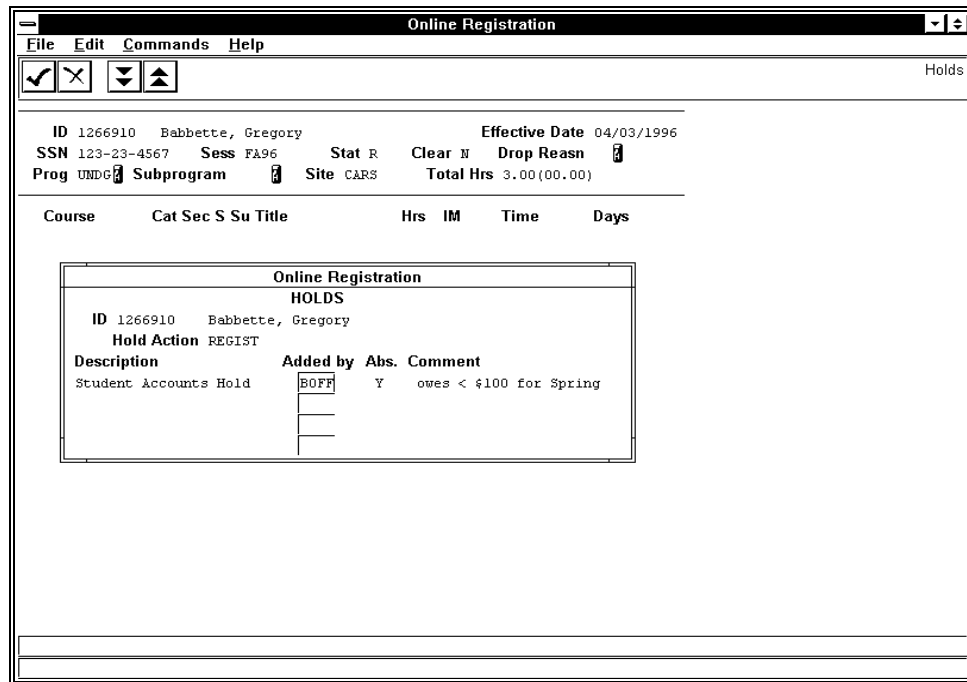
Two Holds windows exist in Registration. Both windows contain information about holds that are currently active for a student. The two Holds windows are distinguished by the following characteristics:

- One Holds window is a view only window that the system displays automatically if holds exist for a student when you first attempt to register the student.
- The other Holds window appears when you select **Holds** from the command line. This window allows you to add or delete holds for a student.

The system displays holds that pertain to every office at your institution (Business office, Registration office, etc.) if they have an impact on Registration; however, you may have the authority only to add or update Registration office holds.

Example of Holds Window (View Only)

Following is an example of the Holds window that appears automatically if holds exist for a student after you select the student to register.



Fields on Holds Window (View Only)

The following is a list of fields that appear on the Holds window and their descriptions.

Abs.

Display only - A default field that specifies whether or not a hold on a student's record is absolute.

Note: "Y" means a hold is absolute. You can neither override absolute holds nor register a student who has an absolute hold.

Note: "N" means a hold is not absolute; it is a notation hold. Depending on the policy of your institution, you may override a notation hold and begin registering the student.

Added by

Display only - A code that specifies which office in your institution added the Hold record (e.g., BOFF for Billing office).

Comment

Display only - Text that offers additional explanation of the nature of the hold.

Example: Owes < \$100 for Spring

Note: Although this is an optional entry field, comments document the reason for the hold.

Description

Display only - A default field containing text corresponding to the value in the Code field.

Example: Student Accounts Hold

Hold Action

Display only - A default field indicating what action a hold is preventing a student from performing (e.g., REGIST or registration).

ID

Display only - The student's identification number and name.

Example: 1266910 Babbette, Gregory

Commands on Holds Window (View Only)

The following is a list of the commands that you can execute from the view only Holds window and their purposes:

Back

Moves the cursor to the previous page of information on the screen.

Cancel

Exits from the current screen.

Finish

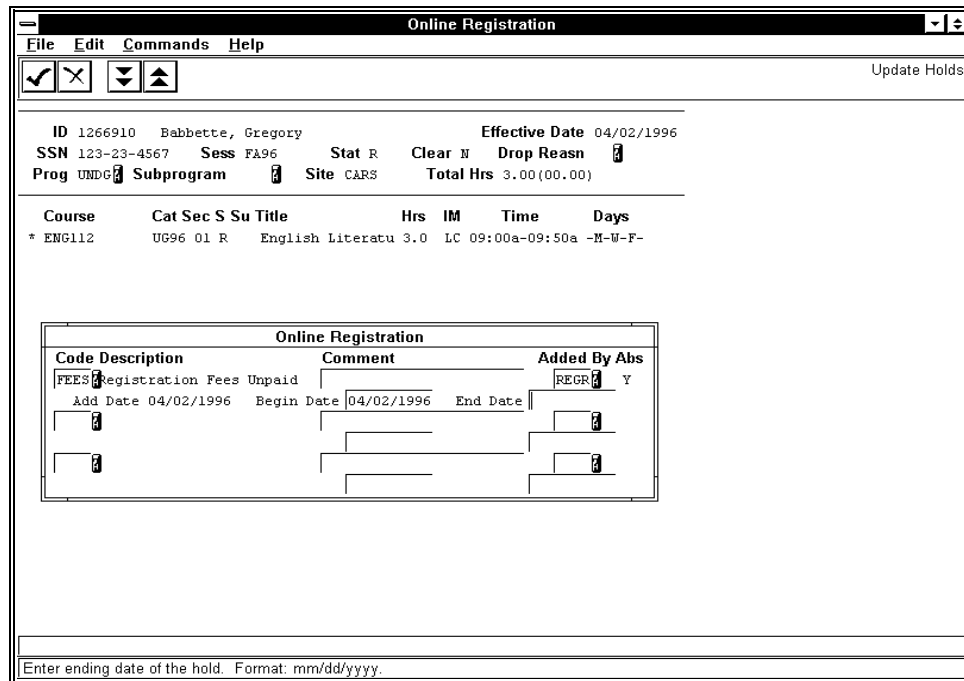
Exits from the current screen.

Forward

Moves the cursor to the next page of information on the screen.

Example of Holds Window

Following is an example of the Holds window that appears when you select **Holds**, enabling you to add and update holds information for a student.



Online Registration

File Edit Commands Help

Update Holds

ID 1266910 Babbette, Gregory Effective Date 04/02/1996
SSN 123-23-4567 Sess FA96 Stat R Clear N Drop Reason
Prog UMDG Subprogram Site CARS Total Hrs 3.00(00.00)

Course	Cat	Sec	S	Su	Title	Hrs	IM	Time	Days
* ENGL12	U696	01	R		English Literatu	3.0	LC	09:00a-09:50a	-M-W-F-

Online Registration

Code	Description	Comment	Added By	Abs
FEES	Registration Fees Unpaid		REGR	Y

Add Date 04/02/1996 Begin Date 04/02/1996 End Date

Enter ending date of the hold. Format: mm/dd/yyyy.

Fields on Holds Window

The following is a list of fields that appear on the Holds window and their descriptions.

Abs

A default field that specifies whether or not a hold on a student's record is absolute.

Note: "Y" means a hold is absolute. You can neither override absolute holds nor register a student who has any absolute holds that affect registration.

Note: "N" means a hold is not absolute; it is a notation hold. Depending on the policy of your institution, you may override a notation hold and begin processing a student for registration.

Add Date

Display only - A default field containing the date (mm/dd/yyyy) on which a Hold record is (was) added. The default value is today's date.

Added By

A code that specifies which office in your institution added the Hold record (e.g., REGR for Registration office). Permissions must be granted to each "Added By" code in order to update or remove the hold.

Begin Date

Required - The date (mm/dd/yyyy) on which the hold takes effect. The default is the system date.

Code

Required - The specific type of hold placed on the student's record.

Example: FEES for Registration Fees Unpaid

Comment

Optional - Text that offers additional explanation of the nature of the hold.

Note: Although this is an optional entry field, comments document the reason for the hold.

Description

A default field containing text corresponding to the value in the Code field.

Example: Registration Fees Unpaid

End Date

Optional - The date (mm/dd/yyyy) on which a hold is no longer effective for a student.

Note: Although this is an optional entry field, be familiar with your institution's policy on when to complete this field.

Note: An active hold has no date displayed.

Commands on Holds Window

The following is a list of the commands that you can execute from the Holds window and their purposes:

Back

Moves the cursor to the previous page of information on the screen.

Cancel

Does either or both of the following:

- Cancels your field entries
- Exits from the current screen

Finish

Saves your field entries. Use this command when you have completed your entries and want to continue.

Forward

Moves the cursor to the next page of information on the screen.

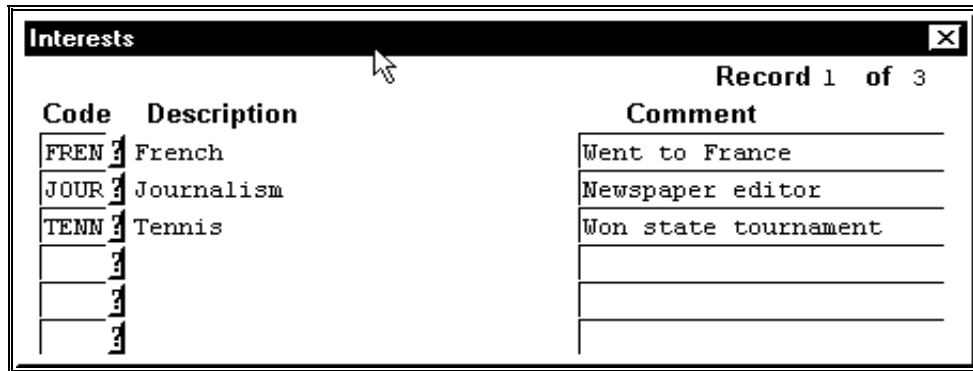
Interests Detail Window

Purpose

The purpose of the Interests Detail window is to enable you to enter one or more student interests. Student interests include academics, sports and hobbies. Each interest record contains information on one interest.

Example

Following is an example of a completed Interests Detail window.



Code	Description	Comment
FREN	French	Went to France
JOUR	Journalism	Newspaper editor
TENN	Tennis	Won state tournament

Fields

The following list describes the fields that appear on the Interests Detail window.

Code

A code indicating the student's interest.

Example: ADVE for advertising, TENN for tennis

Comment

Text that you type to provide additional information about a student's interest.

Example: Won state tournament

Description

Displays text corresponding to the Code field and describes the code.

Example: Tennis

Commands

The following list describes the commands you can execute from the Interests Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

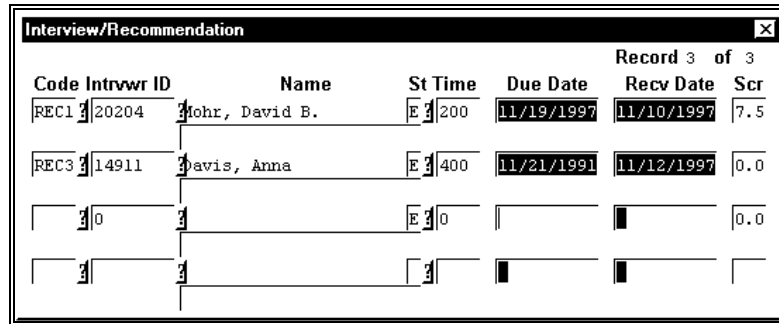
Interviews/Recommendations Window

Purpose

The Interview/Recommendations Screen allows you to enter recommendation and interview information for an applicant. You can enter the name of the person sending in a recommendation for an applicant, and how highly the applicant was recommended. You may also enter the date and time of an interview and with whom the applicant will be interviewing.

Example

Below is an example of the Interview/Recommendations window.



Code	Intrvwr ID	Name	St Time	Due Date	Recv Date	Scr
REC1	20204	Fohr, David B.	E 200	11/19/1997	11/10/1997	7.5
REC3	14911	Davis, Anna	E 400	11/21/1991	11/12/1997	0.0
			E 0			0.0
			E			

Fields

The following lists and describes the fields on the Interview/Recommendations window.

Code

A numbered code indicating whether this is an interview or a recommendation (e.g., the code for the first recommendation received would be Rec 1).

Due Date

The date of the interview, or the due date of the recommendation.

Intrvwr ID

The ID number of the person who will be interviewing the applicant. Used only if you are entering an interview.

Name

The name of the interviewer, or the name of the person who sent the recommendation.

Record...of...

The number of the record in relation to the total number of records.

Recv Date

The date the recommendation was received.

Scr

The student's score or rating from the interview or recommendation. This field is optional.

St

The status of the recommendation or interview. Valid values are:

- E (Expected)
- C (Completed)

Time

The time that the interview is scheduled.

Commands

The following is a list of the commands you can execute from the Interview/Recommendations window and their purposes:

Back

Enables you to move back one screen of data, if additional screens exist.

Cancel

Does on or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

Del-line

Deletes a line of information from the screen.

Finish

Saves your field entry and returns you to the Admissions Entry screen.

Forward

Enables you to move forward one screen of data, if additional screens exist.

Insert

Inserts a new blank line in to which you can enter information, or moves your cursor to the next available line.

Scroll

Exits the Interviews/Recommendations window and displays the Detail window scroll screen.

Involvements Detail Window

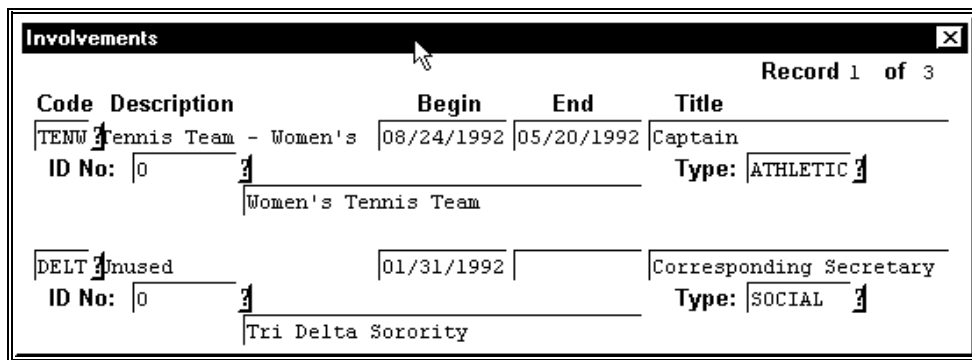
Purpose

The Involvements screen enables you to enter a student's extracurricular activities. You can enter types of activities such as sports, band, clubs, or a political or social organization. Depending on the policy of your institution, you can enter extracurricular activities for a student's previous institution and/or the institution the student currently attends.

Each involvement record contains information on one extra-curricular activity. Therefore, if you enter three activities for a student, that student has three separate involvement records.

Example

Following is an example of a completed Involvements Detail window.



The screenshot shows a window titled "Involvements" with a close button in the top right corner. The window displays a table with the following columns: Code, Description, Begin, End, and Title. The first record is for "TENN Tennis Team - Women's" with a Begin date of 08/24/1992, an End date of 05/20/1992, and a Title of "Captain". The second record is for "DELTA unused" with a Begin date of 01/31/1992 and a Title of "Corresponding Secretary". Below the table, there are input fields for "ID No:" and "Type:". The first record has an ID No. of 0 and a Type of ATHLETIC. The second record has an ID No. of 0 and a Type of SOCIAL. The window also shows "Record 1 of 3" in the top right corner.

Code	Description	Begin	End	Title
TENN	Tennis Team - Women's	08/24/1992	05/20/1992	Captain
DELTA	unused	01/31/1992		Corresponding Secretary

Fields

The following list describes the fields that appear on the Involvements Detail window.

Begin

The date (mm/dd/yyyy) indicating the first day of a student's involvement in an extracurricular activity.

Code

A code indicating a student's extracurricular activity.

Example: PRES for Presidents Club, TENW for women's tennis team

Description

Displays text corresponding to the Code field and describes the code.

Example: Tennis Team - Womens

End

The date (mm/dd/yyyy) indicating the last day of a student's involvement in an extracurricular activity.

ID No

An organization's identification number.

Note: If an ID number does not exist for an organization, press <CR> and enter the name of the organization.

Title

A code indicating the title a student holds within an organization.

Example: Captain

Type

A code indicating the type of extracurricular activity.

Example: ACADEMIC, ATHLETIC, BUSINESS, SERVICE, SOCIAL

Commands

The following list describes the commands you can execute from the Involvements Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Operator Form Request Screen

Purpose

The Operator Form Request screen enables the operator to view a current student's form request history, produce a form for a student, and view, update, or add holds for a current student. This form request process allows forms or reports to be generated without a Contact record. The forms are defined within the form entry table. This form request process also provides a means for deferred batch processing.

Note: The system uses the Program Enrollment record, session, and year you specify to store the number of official and unofficial transcripts that have been printed if this feature has been turned on.

Access

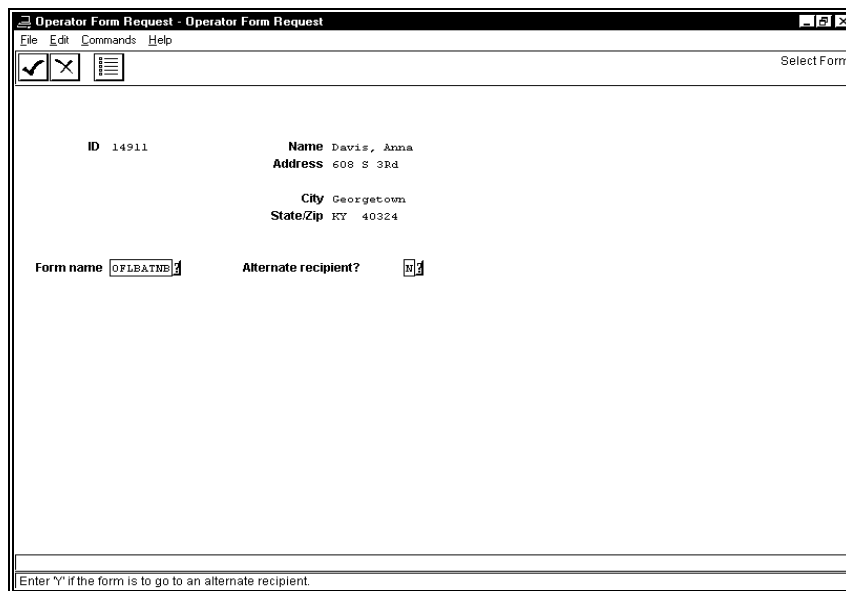
Access the Operator Form Request screen by selecting the following, beginning at the Student Management Main menu:

1. Registrar
2. Registration
3. Operator Form Request

Note: Other access paths can exist.

Example

Following is an example of the Operator Form Request screen.



The screenshot shows a window titled "Operator Form Request - Operator Form Request". The window has a menu bar with "File", "Edit", "Commands", and "Help". Below the menu bar are three icons: a checkmark, a close button (X), and a list icon. In the top right corner, there is a "Select Form" button. The main area of the window displays the following information:

ID	14911	Name	Davis, Anna
Address	608 S 38d		
City	Georgetown		
State/Zip	KY 40324		
Form name	DFLEATNB	Alternate recipient?	N

At the bottom of the window, there is a small text box that says "Enter *Y* if the form is to go to an alternate recipient."

Fields

The following list describes the fields that appear on the Operator Form Request screen.

Address

The student's street address.

Alternate recipient?

Either Y (Yes) or (No) indicating whether this form should go to an alternate recipient.

City

The city in the student's address.

Form name

The code for the type of form you want to produce.

ID

The identification number of the student.

Name

The name of the student.

State/Zip

The state and zip code in the student's address.

Commands

The following list describes the commands you can execute from the Operator Form Request screen.

Note: You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

Cancel

Exits the screen without saving any field entries.

Done

Saves the field entry or entries so the request can continue.

Exit

Exits the current screen.

Finish

Displays an ID field so you may select the identification number of the recipient.

Form Order

Accesses the Form name field so the type of form can be specified.

History

Displays the student's form request history.

Holds

Displays the Holds window from which hold information can be added, viewed, or updated.

List

Displays a list of form types from which to select the desired form.

Lookup ID

Displays the ID Query screen from which ID information can be located.

Query

Accesses the ID field to allow the query of another student.

Other Name Detail window

Purpose

The Other Name Detail window enables you to enter alternate names or social security numbers for an individual, such as a nickname, maiden name, or previous name (a name before a name change). The name and address management program (ADR) uses the information on this screen to create the name format that appears on an envelope or salutation. You can perform queries on alternate names or social security numbers.

Each record on this screen contains information on one alternate name. You can enter multiple records.

Example

Following is an example of an Other Name Detail window.

Other Name				
Record 1 of 1				
Alt Name	Alt SS#	Code Stl	Active	Inactive
Janey Whitmore		S P	12/10/1996	06/10/1997
Alt Title	Alt Suffix			
MISS				
Sec ID/Name				
0				
Used by				
0				
Office Added By	ADMS Admissions			
Alt Title	Alt Suffix			
Sec ID/Name				
Used by				
Office Added By				

Fields

The following list describes the fields that appear on the Other Name Detail window.

Active

The beginning date (mm/dd/yyyy) in a range specifying when the entry becomes active for ADR use. This field defaults to today's date.

Note: This date does not apply to previous names and social security numbers. This date only applies to names used by ADR. However, ID Query will allow queries on all previous names and social security numbers.

Alt Name

The individual's alternate name and how the individual(s) want to be addressed.

Example: John and Jeanne Doe; Doe, Jeanne

Alt SS#

The individual's alternate social security number. This field is used when performing queries if an alternate social security number is known.

Alt Suffix

A sequence of letters at the end of the individual's name representing an alternate professional title (e.g., MD for a Doctor of Medicine). Use **Table Lookup** for a list of valid codes.

Note: The name and address management program (ADR) uses the Suffix field to format a name. ADR distinguishes between a professional suffix (e.g., M.D.) and a family suffix (e.g., Jr.). The family suffix remains a part of the Name field.

Alt Title

The individual's alternate title, such as Miss, Mr, Dr. Use **Table Lookup** for a list of valid values.

Code

A code indicating whether you want the individual's name you are entering to appear either on a label or as a salutation for a letter. Valid values are:

- L (label)
- S (salutation)

Inactive

The ending date (mm/dd/yyyy) in a range specifying when the entry is no longer active for ADR use.

Office Added By

A code indicating the office at your institution that added the name record to this screen. Use **Table Lookup** for a list of valid codes.

Example: ADMS for Admission

Sec Id/Name

Example: The identification number or name of an associated individual, if applicable. Use **F6** to perform an ID Query.

Stl

A code indicating a specific style of the alternate name. Use **Table Lookup** for a list of valid codes.

Example:

- F for formal, such as Smith, Jonathan A
- N for nickname, such as Smith, Johnny
- P for previous name.

Used By

An ID number that has exclusive use of this alternate name.

Example: An administrator at your institution might personally know and call an individual by his middle name (Patrick), but that individual is officially known by his first name (James). The administrator can personalize correspondence with this individual by creating an Other Name record using this screen. The Name field could contain that individual's middle name (Patrick), and the Used by field could contain the administrator's ID number.

Commands

The following is a list of commands you can execute from the Other Name Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Other/Alternate Address Detail Window

Purpose

The Other/Alternate Address Detail window enables you to do the following:

- Enter multiple addresses for a student, such as a summer, winter, previous, or billing address.
- Enter an address that is too long to fit in the space provided by the entry screens, since some international addresses require three lines for an address rather than the standard two lines.
- Specify date ranges used by the name and address program (ADR) to select appropriate addresses for correspondence.

Each record on this screen contains information about one address. You can enter multiple records.

Example

Following is an example of an Other/Alternate Address Detail window.

Other/Alternate Address							
							Record 1 of 1
Code	Description	Yrly	Begin	End	Office	Phone	Ext Prior
SUMR	Summer Address	Y	05/21/1992	08/20/1992	ADMS	23-098-7654	15
1	10 Sunshine Way						
2							
	City				State	FL	Zip 32222
	Ctry						USA UNITED STATES
1							
2							
	City				State		Zip
	Ctry						

Fields

The following list describes the fields that appear on the Other/Alternate Address Detail window.

1

The first line of an individual's address.

2

The second line of an individual's address.

3

The third line of an individual's address.

Begin

The date (mm/dd/yyyy) on which an alternate address becomes valid.

City

The city of an individual's alternate address (e.g., Palm Springs).

Code

A code indicating the type of alternate address for the individual. Use **Table Lookup** for a list of valid codes.

Example: BUS for business address, LOC for local address, SUMR for summer address

Ctry

The country of an individual's alternate address.

Description

Displays a description of the code field. The system displays this description after you enter a valid code in the Code field.

End

The date on which an alternate address is no longer valid for the individual.

Ext

The telephone extension number of an individual at the individual's alternate address.

Office

A code indicating which office at your institution is adding the alternate address (e.g., ADMS for admission). Use **Table Lookup** for a list of valid codes.

Phone

An individual's permanent telephone number at the individual's alternate address.

Prior

A number identifying the priority of an alternate address.

Note:

- When you select Table Lookup for the Code field, a priority number appears to the right of each code on the Table Lookup screen. The lower the number, the higher the priority for that alternate address code. The name and address management program (ADR) selects the lowest priority for mailings based on several checks.
- Priority numbering is a policy decision that your institution makes.

State

A code identifying the state of an individual's alternate address.

Yrly

Either **Y** or **N** specifying whether or not the alternate address is valid each year between the specified date range.

Zip

The zip code for an individual's alternate address.

Commands

The following describes commands you can execute from the Other/Address Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you move forward through a list of records.

Scroll

Updates the detail window information.

Parent Form Screen

Purpose

The Parent Form screen enables you to view, add, and update constituent information for a parent.

Example

Following is an example of the Parent Form screen.

ID No	22346	SS No	232-32-3232	Add Date	05/12/1988
Title	DRMS Mr. Mrs.	Last Update	04/10/1996	Telephone	406-555-3333
Name	Abraham, James	Deceased	N	Correct Address	Y
Suffix		Alternate Address	PERM	City	Pittsburgh
Address	123 Elm Street	State/Zip	PA 34444	Country	USA
Child ID	22337	Date	01/01/1988	Rel Code	PC Parent/Child
	Aardvark, Anne				

Enter social security number. Format: ### ## ####

Fields

The following is a list of fields that appear on the Parent Form screen and their descriptions.

Add Date

The date the system added the ID record to the database. A display-only field, the system enters this information.

Address

The parent's permanent address appearing in the parent's ID record. You can enter up to two lines of address information.

Alternate Address

A code identifying the type of address that appears in the Address field (e.g., PERM if it is permanent). Use **Table Lookup** for a list of valid codes.

Child ID

The ID number of the child associated with the parent. Press <F6> to perform a query. The system enters the name below.

City

The city of the parent's permanent address appearing in the parent's ID record.

Correct Address

A code indicating whether the parent's address is correct (Y) or not (N).

Country

The country of the parent's permanent address appearing in the parent's ID record (e.g., USA for the United States). Use **Table Lookup** for a list of valid countries.

Date

The date (mm/dd/yyyy) the Parent/Child relationship began or became known.

Deceased

These are two fields. The first field is the code indicating if the parent is deceased (Y) or not (N). If Y, the second field is the date (mm/dd/yyyy) the parent passed away.

ID No

The system-generated number identifying the parent in the database.

Last Update

The date the ID record was last updated by the system or a user. A display-only field, the system enters this information.

Name

The parent's name in the format: last name, first name middle name (or initial), family suffix (e.g., Jr., Sr., III, etc.).

Note: The two commas separating the middle name (or initial) and family suffix is a flag the system uses so that the name prints correctly in reports, etc. (e.g., *Doe, John J., Jr.* would print as *John J. Doe, Jr.*).

Rel Code

These are two fields. The first field is the Relationship code identifying the relationship, such as PC for Parent/Child. The second field is the description of the code. Display-only fields, the system enters this information.

SS No

The parent's social security number appearing in the parent's ID record (e.g., 232-32-3232).

State/Zip

These are two fields. The first field is the two-letter state abbreviation and the second field is the zip code of the parent's permanent address appearing in the parent's ID record. Use **Table Lookup** for a list of valid states and zip codes.

Suffix

A letter or sequence of letters at the end of the parent's name representing a professional title (e.g., MD for a Doctor of Medicine). Use **Table Lookup** for a list of valid codes.

Note: The name and address management program (ADR) uses the Suffix field to format a name. ADR distinguishes between a professional suffix (e.g., M.D.) and a family suffix (e.g., Jr.). The family suffix remains a part of the Name field.

Telephone

The parent's permanent telephone number appearing in the parent's ID record (e.g., 406-555-3333).

Title

A code identifying the parent's title appearing in the parent's ID record (e.g., DRMS). Use **Table Lookup** for a list of valid codes. The system enters the description of the code to the right.

Commands

The following describes the commands you can execute from the Parent Form screen and their purposes.

Note: You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Auto-Mode

By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

Cancel

In Insert, Query, and Update modes, does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

Close

Enables you to close the ID Types/Associated Records window.

Detail

In Display, Insert, and Update modes, displays the Detail windows enabling you to select multiple-item information, or records, associated with the ID number.

Display ID

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

Exit

Enables you to quit the program and return to the menu.

Find ID

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, social security number, etc.) and narrow the search for an ID record.

Finish

In Insert and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

Finished

Enables you to close the ID Types/Associated Records window.

ID-Type

In Display, Insert, Query, and Update modes, displays the view-only ID Type/Associated Records window containing information about the parent. The window contains a variety of logical (Y/N) fields; the codes in the fields vary, depending on the types of records that exist in the system for the parent. For example:

- If the parent has a Alumni record, the Alumni field contains Y
- If the parent has a Donor record, the Donor field contains Y

Insert

Puts the screen into Insert mode. Enables you to add a new record.

Note: This command appears after you select **Query**, then **Find ID**. At the ID Query screen, select **Cancel** to return to the Parent Form screen.

Menu

Returns you to the initial Forms menu. Enables you to select another form.

Query

Puts the screen into Query mode. Enables you to query on an ID or social security number.

Select

In Query mode, enables you to select the ID or social security number entered and searches for the associated ID record.

Update

In Query mode, puts the screen into Update mode. Enables you to update the record(s).

Program Enrollment Detail Window

Purpose

The Program Enrollment Detail window enables you to add or update the following for a student:

- Program code (e.g., UNDG for Undergraduate)
- Class code (e.g., SR for Senior)
- Major code (e.g., ENG for English)

Each Program Enrollment record for a student contains information from one academic program.

Access

Access the Program Enrollment Detail window by selecting the following, beginning at the Housing Data Entry - Student Housing Form screen:

1. **Query**
2. **Select**
3. **Detail**
4. **Program** (from the Detail windows menu)

Note: You can access this window from multiple modules, as a result different access paths may exist.

Example

Following is an example of the Program Enrollment Detail window.

Program Enrollment				
				Record 1 of 1
Code	Program Text	CL Major 1/2	Description	Site
UNDG	Undergraduate	FR CSC	Computer Science	
		PHY	Physics	CARS

Fields

The following list describes the fields that appear on the Program Enrollment Detail window.

CL

The student's class code (e.g., FR for Freshman).

Code

The academic program code (e.g., UNDG).

Description

The description of the code appearing in the Major 1/2 field (e.g., Computer Science and Physics).

Note: The system automatically enters the description when you enter a valid code in the Major 1/2 field.

Major 1/2

The student's primary and secondary major (e.g., CSC and PHY).

Program Text

The description of the academic program code (e.g., Undergraduate).

Note: The system automatically enters the description of the academic program when you enter a valid program code in the Code field.

Site

The institution site that the student attended or is attending for this program.

Commands

The following list describes the commands you can execute from the Program Enrollment Detail window.

Note: You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Back

Moves you back through a list of records.

Cancel

Exits the detail window without saving any field entries.

Del-line

Deletes a record.

Finish

Saves any field entries and exits the detail window.

Forward

Moves you forward through a list of records.

Insert

Places the screen in Insert mode so you can add a record.

Scroll

Accesses the Detail windows menu.

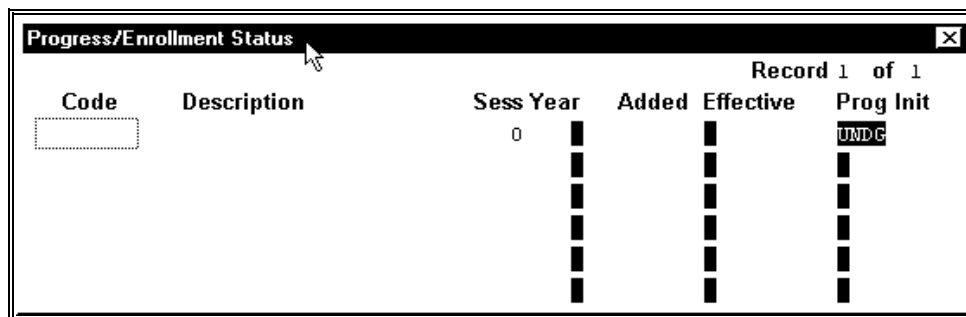
Progress/Enrollment Status Detail Window

Purpose

The Progress/Enrollment Status Detail window is a view-only screen that allows you to view a student's progression through the admissions process, as well as the student's current enrollment status.

Example

Following is an example of a Progress/Enrollment Status Detail window.



Code	Description	Sess Year	Added	Effective	Prog Init
		0			UNDG

Fields

The following list describes the fields that appear on the Progress/Enrollment Status Detail window.

Added

Displays the date on which your institution changed a student's status. A student's status changes based on the code in your institution's Enrollment Sequence table.

Code

Displays a code indicating the stage at which a student is located in the admissions process.

Example: INQUIRED, APPLIED, COMPLETE

Description

A description of the code in the Code field.

Effective

The date on which a student's status becomes effective.

Init

A code indicating whether correspondence is incoming (I) or outgoing (O).

Prog

A code indicating the program in which a student is planning to enroll at your institution.

Example: UNDG for undergraduate

Sess

A code indicating the session for which a student is applying for admission.

Example: FA for Fall

Year

The year in which a student plans to enroll at your institution.

Commands

The following list describes commands you can execute from the Progress/Enrollment Status Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Prospect/Applicant History Detail Window

Purpose

The Prospect/Applicant History Detail window enables you to view information about a student's previous applications, as well as the latest status on the current application.

Example

Following is an example of a Prospect/Applicant History Detail window.

The screenshot shows a window titled "Prospect/Applicant History" with a close button in the top right corner. The window displays the following information:

Prior Sess/Yr	FA	1992	Program	UNDG	Record	1 of 1
Prev. Apply	N		Classification	FR	Add Date	07/05/1994
Financial Aid	N		Full/Part-time	0	Transfer	N
Vet Benefits	N		Early Decision	N	Housing	R
Major	UNDE		Decision Code	FULL	Ed Goal	B
Referral	ACT				Dec Date	10/10/1992
Last Status	APPLIED		Last Status Date	12/16/1993		
Prev Status			Previous Status Date			
Counselor ID	20522	B00P				

Fields

The following list describes the fields that appear on the Prospect/Applicant History Detail window.

Add Date

Displays the date when your institution added the ID record to the database. You cannot change this date.

Classification

A code indicating the category in which your institution places a student at the time the student is accepted to your institution.

Example: FF first time freshman, TR transfer student.

Counselor ID

The identification number and name of the student's admissions counselor at your institution.

Example: 20522 Smith, Betty B.

Note: If you do not know the counselor's identification number, select Table Lookup to find this information. If the counselor does not have an ID number (e.g., it is not in the database), leave this field blank.

Decision Code

A code representing your institution's decision regarding a student's admission.

Example: FULL for full acceptance, PROB for probationary acceptance

Dec Date

The date (mm/dd/yyyy) on which your institution made or expects to make a decision to admit or reject an applicant.

Early Decision

Either **Y** or **N** specifying whether or not a student is applying for early decision at your institution.

Note: A typical early decision program is one in which a student applies to a school and is informed of acceptance six months to a year before the student plans to attend.

Ed Goal

A code indicating the degree a student intends to obtain at your institution (e.g., B for Bachelors).

Financial Aid

Either **Y** or **N** indicating whether or not a student is applying for financial aid.

Full/Part time

The number of credit hours a student intends to take for the planned enrollment session.

Note: Be familiar with your institution's policy on the number of credit hours that a student must take to be considered a full-time student.

Housing

A code that indicates the type of housing in which a student intends to reside.

Example:

- C for commuter if the student intends to live at home and commute to your institution
- L for local if the student is a native of the city in which your institution is located
- R for resident if the student intends to live on campus

Last Status

Displays a code indicating the latest stage at which the student was located in the admission process. You cannot change this code.

Example: APPLIED for a student who has applied for admission to your institution, INQUIRED for a student who has inquired about your institution

Last Status Date

Displays the last date your institution received notice either establishing a status for a student or requiring that a student be given a new status. You cannot change this field.

Major

A code identifying a student's intended major.

Example: UNDE for undecided

Note: If the student has not yet declared an intended major, this field is blank.

Prev Status

Displays the code indicating the previous stage at which the student was located in the admission process. You cannot change this code.

Example: APPLIED for a student who has applied for admission to your institution, INQUIRED for a student who has inquired about your institution

Prev. Apply

Either **Y** or **N** specifying whether or not a student has previously applied for admission to your institution.

Previous Status Date

Displays the previous date your institution received notice either establishing a status for a student or requiring that a student be given a new status. You cannot change this field.

Prior Sess/Yr

The session (such as FALL) and year (such as 1996) the student last applied for admission.

Program

Displays a code specifying the program in which a student plans to enroll at your institution. You cannot change this field.

Example: UNDG for undergraduate program

Referral

A code identifying the person, organization, or service that informed a student about your institution.

Example: ALUM for alumni

Note: Use Table Lookup to find this information, if it exists. Otherwise, leave this field blank.

Transfer

Either **Y** or **N** specifying whether or not a student is transferring from another institution to your institution.

Vet Benefits

Either **Y** or **N** indicating whether or not an applicant is eligible for or is currently receiving veteran benefits.

Commands

The following list describes commands you can execute from the Prospect/Applicant detail window and their descriptions:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Allows you to move back through a list of records.

Cancel

Allows you to exit from the screen without saving any field entries.

Del-line

Allows you to delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

Forward

Allows you to move forward through a list of records.

Scroll

Updates the detail window information.

Schedule Activities Detail Window

Purpose

The Schedule Activities Detail window enables you to enter information about a scheduled high school or college visit including date and time, location and the current status. You access this window from a Schedule Entry screen.

Note: For more information about how to schedule a visit, see the *Using Schedule Entry* section in this guide.

Example

The following is an example of the Schedule Activities Detail window.

SCHEDULE ACTIVITIES						
CF Stat	ID	Location/Phone/Ext	LC	Date	Time	Record 1 of 1
N	S	7856 Rohs, Ruth Esther 6027742875	HS		0	

Fields

The following lists and describes the fields on the Schedule Activities Detail window. You can use **Table Lookup** for a list of valid entries for most of these fields.

CF

A yes or no value that answers the question, "Has this scheduled event been confirmed?"

Date

The scheduled date (dd/mm/yyyy) of the event.

ID

The ID number of the location where the event will be held (e.g.,12345).

LC

The type of location where the event is to occur. Valid values are as follows:

- CF (College fair)
- CH (Church fair)
- CO (College visit)
- HS (High school visit)
- JC (Junior College visit)
- JH (Junior High visit)

Location/Phone/Ext

Display only - Information about the location, phone number, and extension relating to the ID number.

Stat

A value indicating the event status. Valid values are as follows:

- S (The event is scheduled)
- F (The event is finished)
- P (The event has been postponed)
- C (The event has been canceled)
- T (The event is tentatively scheduled)

Note: The above values are defined in the following file:

– \$CARSPATH/macros/custom/common/SCHD_PLACE_VALID

Time

The time the event is to occur (e.g., 1100 for 11:00 a.m.)

(Unlabeled Text Field)

Any pertinent information concerning the scheduling of the event or the event itself.

Schedule Entry Screen

Purpose

The Schedule Entry screen enables you to create schedule records that are used to track high school and college visits as well as generate letters to prospects.

Example

The following is an example of the Schedule Entry screen.

ID No	56784	SSN	160385	Add Date	08/03/1989
Title				Last Upd	
Name	Bettendorf High School				
Address	3333 18th Street				
Telephone	555-463-1234				
City	Bettendorf				
State/Zip	IA 52722	Country	USA	Alternate Address Code	BUS

Fields

The following lists and describes the fields on the Schedule Entry screen.

Add Date

The date (mm/dd/yyyy) when the event was first scheduled.

Address

The street address of the event location.

Alternate Address Code

A code identifying the type of address (e.g., permanent, business, local). Use **Table Lookup** for a list of valid entries.

City

The city of the event location.

Country

The country of the event location. Use **Table Lookup** for a list of valid entries.

ID No

The identification number of the contact or the place where the event will be held.

Last Upd

The date (mm/dd/yyyy) of the last update made to this scheduled event.

Name

The name of the location or contact person for this event.

SSN

The federal tax ID or social security number of the contact or location.

State/Zip

The state and zip code of the event location. Use **Table Lookup** for a list of valid entries.

Title

The title of the contact person.

Commands

The following is a list of the commands you can execute from the Schedule Entry screen and their purposes:

Note: You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Cancel

Allows you to exit from the screen without saving any field entries.

Detail

In Update mode, displays the Schedule Activities Detail window.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits you from the screen.

ID-Type

In Update mode, displays the ID-Type/Associated Record screen on which you can enter additional information about the event.

School Form Screen

Purpose

The School Form screen allows you to view, add, and update constituent information for a school.

Example

Following is an example of the School Form screen.

ID No	16120	CEEB/Fed ID	1000001	Add Date	09/29/1986
Name	CARS University			Last Update	09/29/1986
Address	4001 Executive Park				
City	Cincinnati	OH	45241		
Country	USA UNITED STATES				
Telephone	513-563-4542				
CEEB No	16120			Last Update	10/17/1995
Denom				College Day	
Enrollment	1200			Code/Type	PU COL
				Conversion Fctr	1.0
				Enrollment Date	11/17/1994

Enter CEEB or federal ID#.

Fields

The following is a list of fields that appear on the School Form screen and their descriptions.

Add Date

The date the system added the ID record to the database. A display-only field, the system enters this information.

Address

The school's permanent address appearing in the school's ID record. You can enter up to two lines of address information.

CEEB No

The number assigned to the school by the College Entrance Examination Board (CEEB).

CEEB/Fed ID

The number assigned to the school by the College Entrance Examination Board (CEEB), or the school's federal ID or social security number appearing in the school's ID record.

City

The city of the school's permanent address appearing in the school's ID record.

Code/Type

These are two fields. The first field is a code indicating whether the school is a private (PR) or a public (PU) institution. The second field identifies the type of school. Valid codes are:

- CC (Community college)
- COL (College)
- GRAD (Graduate school)
- HS (High school)

College Day

The date (mm/dd/yyyy) of the college fair at the school.

Conversion Fctr

The number (or factor) used to convert the school's credit hours to your institution's hours (e.g., 1.0 means that for every one credit hour taken at this school, 1.0 credit hour is applied to the student's transcript).

Country

A code identifying the country of the school's permanent address appearing in the school's ID record (e.g., USA for the United States). Use **Table Lookup** for a list of valid countries. The system displays the description of the code to the right of the field.

Denom

A code identifying the school's denomination. Use **Table Lookup** for a list of valid codes.

Enrollment

The number of students enrolled at the school.

Enrollment Date

The date (mm/dd/yyyy) the number of students enrolled at the school was effective. If you are adding constituent information for a school, defaults to the current date.

ID No

The system-generated number identifying the school in the database.

Last Update (lower field)

The date the School record was last updated by the system or a user. A display-only field, the system enters this information.

Last Update (upper field)

The date the ID record was last updated by the system or a user. A display-only field, the system enters this information.

Name

The school's name.

(State)

This is an unlabeled field located to the right of the City field. The two-letter state abbreviation of the school's permanent address appearing in the school's ID record. Use **Table Lookup** for a list of valid states.

Telephone

These are two fields. The first field is the school's permanent telephone number appearing in the school's ID record (e.g., 513-563-4542). The second field is the school's extension number, if necessary.

(Zip)

This is an unlabeled field located to the right of the (State) field. The zip code of the school's permanent address appearing in the school's ID record. Use **Table Lookup** for a list of valid zip codes.

Commands

The following is a list of the commands you can execute from the School Form screen and their purposes:

Note: You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

Auto-Mode

By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

Cancel

In Insert, Query, and Update modes, does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

Close

Enables you to close the ID Types/Associated Records window.

Detail

In Display, Insert, and Update modes, displays the Detail windows enabling you to select multiple-item information, or records, associated with the ID number.

Display ID

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

Exit

Enables you to quit the program and return to the menu.

Find ID

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, social security number, etc.) and narrow the search for an ID record.

Finish

In Insert and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

Finished

Enables you to close the ID Types/Associated Records window.

ID-Type

In Display, Insert, Query, and Update modes, displays the view-only ID Type/Associated Records window containing information about the school. The window contains a variety of logical (Y/N) fields; the codes in the fields vary, depending on the types of records that exist for the school. For example:

- If the school has a Donor record, the Donor field contains Y
- If the school has a Constituent record, the Constituent field contains Y

Insert

Puts the screen into Insert mode. Enables you to add a new record.

Note: This command appears after you select **Query**, then **Find ID**. At the ID Query screen, select **Cancel** to return to the School Form screen.

Menu

Returns you to the initial Forms menu. Enables you to select another form.

Query

Puts the screen into Query mode. Enables you to query on an ID or social security number.

Select

In Query mode, enables you to select the ID or social security number entered and searches for the associated ID record.

Update

In Query mode, puts the screen into Update mode. Enables you to update the record(s).

Second Relationship Detail Window

Purpose

The Second Relationship Detail window enables you to enter relationships that exist between individuals and organizations connected with your institution in some way. The Second Relationship screen contains relationships between any of the following:

- Two individuals
- Two organizations
- An individual and an organization

For example, you can enter a relationship between a parent and a child (who is also a student), or between your institution and a student worker. A relationship important to an Admission office is one between a prospective student and the student's parents, since many institutions send letters to the parents of the students they are recruiting.

The major component of this screen is the relationship ID code that represents the type of relationship about which you are entering information. This code helps you to determine whether you enter information in the First Relationship screen or the Second Relationship screen.

Examples of relationship ID codes include the following:

- CE for Company/Employee
- MD for Mother/Daughter

Each record on this screen contains information on one relationship. For example, if you enter two relationships, there are two separate records.

Which Relationship Screen Should You Use?

Enter information in the Second Relationship Detail window when the right side of the relationship ID code (e.g., the wife in the code "HW" for husband/wife) represents the individual or organization whose record you are currently adding or updating on the entry screen.

Example

Following is an example of a completed Second Relationship Detail window.

The screenshot shows a window titled "Second Relationship" with a close button (X) in the top right corner. Below the title bar, it says "Record 1 of 1". A message reads: "The person selected above is on the RIGHT side of the relationship code." Below this is a table with the following columns: Rel ID, Name, Code, Begin, End, and Prt Mnt. The first row of data is: 92395, Doe, John J., Jr., FD, Father/Daughter, 12/31/1971, N. The remaining rows in the table are empty.

Rel ID	Name	Code	Begin	End	Prt Mnt
92395	Doe, John J., Jr.	FD	Father/Daughter	12/31/1971	N

Fields

The following list describes the fields that appear on the Second Relationship Detail window.

Begin

The date on which a relationship began or became known.

Example: 09/10/199x for a student's date of hire

Code

A code that indicates the type of relationship between two individuals, two organizations, or an individual and an organization.

Example: CE for Company/Employee, FD for Father/Daughter

Note: Keep in mind that the individual or organization whose record you are currently adding or updating is on the right side of the relationship ID code (e.g., the daughter in the code "FD" for father/daughter).

End

A date indicating the last day of a relationship. Leave this field blank if it does not apply to a relationship.

Example: 05/20/199x for a student's date of termination of employment.

Name

The name of an individual or organization on the right side of a relationship. The system displays the name automatically when you enter a valid ID number in the Rel ID field.

Example: Doe, Jane for the daughter in the father/daughter relationship

Print

A code indicating whether or not the name of the individual or organization on the right side of a relationship should be placed first on correspondence.

Rel Id

The identification number for the individual or organization on the left side of a relationship. 67890 for John J. Doe, Jr. in the father/daughter relationship.

Commands

The following list describes the commands you can execute from the Second Relationship detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.
In update mode, saves any field entries and exits you from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

Student Form Request Screen

Purpose

The Student Form Request screen enables a student to order forms and shows the student's form order history.

Access

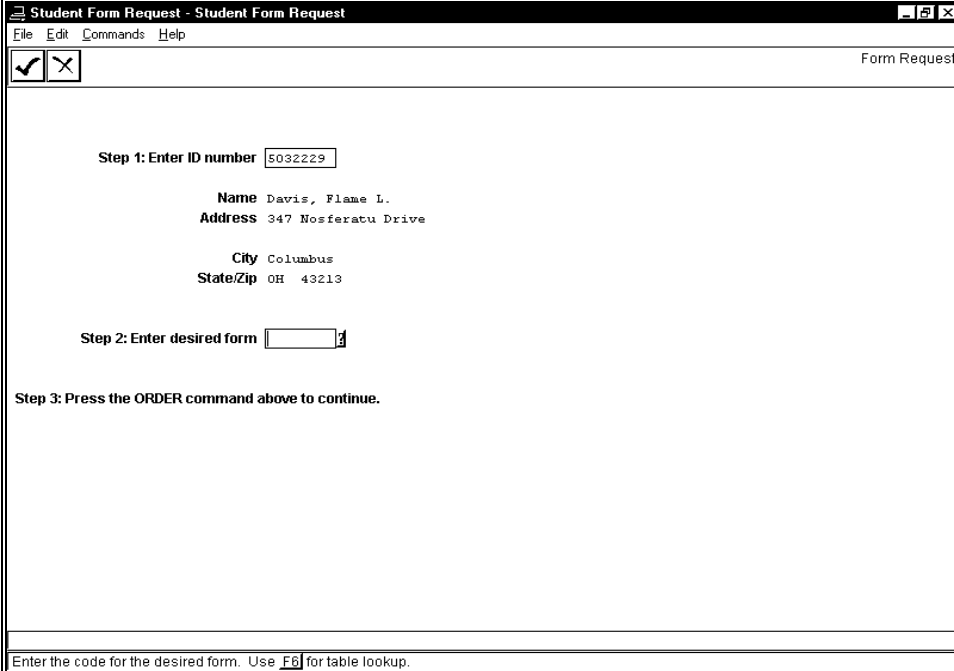
Access the Student Form Request screen by selecting the following, beginning at the Student Management: Main menu:

1. Registrar
2. Registration
3. Student Form Request (complete the parameter screen fields, then select **Finish**)

Note: Other access paths can exist.

Example

Following is an example of the Student Form Request screen.



The screenshot shows a window titled "Student Form Request - Student Form Request" with a menu bar (File, Edit, Commands, Help) and a title bar (Form Request). The main area contains the following text:

Step 1: Enter ID number

Name Davis, Flame L.
Address 347 Nosferatu Drive

City Columbus
State/Zip OH 43213

Step 2: Enter desired form

Step 3: Press the ORDER command above to continue.

Enter the code for the desired form. Use F6 for table lookup.

Fields

The following list describes the fields that appear on the Student Form Request screen.

Address

Display only - The student's street address.

City

Display only - The city in the student's address.

Name

Display only - The student's name.

State/Zip

Display only - The state and zip code in the student's address.

Step 1: Enter ID number

The identification number of the student (e.g., 5032229).

Step 2: Enter desired form

The code for the desired form (e.g., UNOFNOBL).

Step 3: Press the ORDER command above to continue.

Display only - The instruction specifying what to do next.

Commands

The following list describes the commands you can execute from the Student Form Request screen.

Note: You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar. Also, you must have the necessary database permission to use that command.

Cancel

Exits the screen without saving any field entries.

Done

Serves as the ORDER command mentioned in step 3.

Student Reporting Record Detail Window

Purpose

The Student Reporting Record Detail window enables you to view data from several student records. You access this window from a Schedule Entry screen.

Example

The following is an example of the Student Reporting Record Detail window.

Student Reporting Record																																																																						
												Record 1 of 1																																																										
Sess	FA	State	KY	Deggrp		1st Tm Date	08/16/98																																																															
Year	1998	Cty	FAYE	First Beg		Withdraw Date																																																																
Prog	UNDG	Ethnic	BL	Last Beg		HS Date																																																																
Subpr		Sex	F	Eff Date	07/23/99	Deg Compl																																																																
Sum	N	Age	62	Add Date	07/23/99	HS ID	0																																																															
Date?	N	Full Tm	Y	Out Ctry	N																																																																	
Type	R	1st Tm	N	Out State	Y	Tr Inst ID	0																																																															
Cl	EX	1st Xfr	N	In State	N																																																																	
Ctry	USA	1st Fr	N	Off Camp	N	Deggrp Stu	N																																																															
						Deggrp Cw	N																																																															
<table border="1"> <thead> <tr> <th>Maj</th> <th>CIP No</th> <th>IPED</th> <th>Deg</th> <th>Reg</th> <th>Audt</th> <th>Reg</th> <th>Remed</th> <th>Rem</th> <th>Aud</th> <th>Reg</th> <th>Out</th> <th>0</th> </tr> <tr> <th></th> <th></th> <th>SI</th> <th>Oc</th> <th>Lev</th> <th>Sk</th> <th>All</th> <th>All</th> <th>Deg</th> <th>Deg</th> <th>NoDeg</th> <th>Conf</th> <th>Wthd</th> <th>Ctry</th> <th>Hr</th> </tr> </thead> <tbody> <tr> <td>HUS</td> <td>50.09</td> <td>N</td> <td>N</td> <td>BS</td> <td>Y</td> <td>6.0</td> <td>6.0</td> <td>6.0</td> <td>0.0</td> <td>0.0</td> <td>6.0</td> <td>0.0</td> <td>0.0</td> <td>N</td> </tr> <tr> <td>MAT</td> <td>27.01</td> <td>N</td> <td>N</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>													Maj	CIP No	IPED	Deg	Reg	Audt	Reg	Remed	Rem	Aud	Reg	Out	0			SI	Oc	Lev	Sk	All	All	Deg	Deg	NoDeg	Conf	Wthd	Ctry	Hr	HUS	50.09	N	N	BS	Y	6.0	6.0	6.0	0.0	0.0	6.0	0.0	0.0	N	MAT	27.01	N	N											
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HUS	50.09	N	N	BS	Y	6.0	6.0	6.0	0.0	0.0	6.0	0.0	0.0	N																																																								
MAT	27.01	N	N																																																																			

Fields

The following lists and describes the fields on the Student Reporting Record Detail window.

0 Hr

A code (yes/no) indicating whether this student is registered in any course with zero credit hours for the specified term or date range. (If a zero hour course is remedial and does not count towards a degree, it is not included.)

1st Fr

A Y (yes) or N (no) indicating whether this student is a first-time freshman in this program.

1st Tm

A Y (yes) or N (no) indicating whether this is a first time student.

1st Tm Date

The first date for which the student can be considered a first time student in an academic program or degree group.

1st Xfr

A Y (yes) or N (no) indicating whether this student was a first time transfer student.

Add Date

The date this record was created.

Age

The age of the student.

Aud Conf

For traditional coursework, the total number of registered audit hours for the specified reporting term for courses with a C (confirmed registered) status. For degree completion, the total number of registered audit hours within a date range for courses with a C (confirmed registered) status. (May include multiple terms.)

Audit All

For traditional coursework, the total number of audit hours for the specified reporting term.
For degree completion, the total number of audit hours for all courses with a R (registered) or C (confirmed registered) status within the date range.

CIP No

The CIP number (Classification of Instructional Programs) associated with this student's major(s).

CI

A code identifying the academic classification for the student at the beginning of this session.

Ctry

A code identifying the country of residence for this student.

Cty

A code identifying the county of residence for this student.

Date?

A Y (yes) or N (no) indicating whether the coursework was selected by date range only.

Deg Compl

The expected degree completion date used for IPEDS reporting.

Deg Sk

A Y (yes) or N (no) indicating whether this student has a degree seeking classification.

Deggrp

A code identifying the accelerated degree group to which this student belongs, if any.

Deggrp Cw

A Y (yes) or N (no) identifying whether the coursework reflected in this record is for accelerated degree coursework.

Deggrp Stu

A Y (yes) or N (no) indicating whether the student is an accelerated degree student.

Eff Date

The effective date for the information in this student record.

Ethnic

A code identifying the student's ethnic background.

First Beg

The beginning date of the date range against which accelerated degree courses are evaluated to be included in a student's hours.

Full Tm

A Y (yes) or N (no) indicating whether the student's credit hour workload is categorized as full-time.

HS Date

The date the student graduated from high school.

HS ID

A code identifying the high school the student graduated from.

In State

A Y (yes) or N (no) indicating whether the student had exclusive enrollment in campuses located in state.

IPED SI

A Y (yes) or N (no) indicating whether the major is one specifically selected for IPEDS reporting.

Last Beg

The last begin date to be included in the date range against which accelerated degree courses are evaluated to be included in a student's hours.

Lev

The level of degree the student will earn.

Maj

A code identifying the major declared by the student. If multiple lines are displayed, the first line shows the primary major; the second line shows the secondary major.

Oc

A Y (yes) or N (no) indicating whether this is an occupational-specific major according to IPEDS.

Off Camp

A Y (yes) or N (no) indicating whether the student had exclusive enrollment in courses held off campus.

Out Ctry

A Y (yes) or N (no) indicating whether the student had exclusive enrollment in campuses located out of the country.

Out Ctry

The total number of registered hours taken out of the country.

Out State

A Y (yes) or N (no) indicating whether the student had exclusive enrollment in campuses located out of state.

Prog

A code identifying the academic program for which this student registered (e.g., UNDG for undergraduate).

Reg All

For traditional coursework, the total number of hours for which the student registered, includes remedial, earned, not earned. For degree completion, the total number of hours for all courses with a R (registered) or C (confirmed registered) status within the date range. Both exclude audit hours.

Reg Deg

The total registered hours creditable towards a degree.

Reg Wthd

The number of withdrawn hours for coursework in the date range.

Rem NoDeg

The total number of registered remedial hours not creditable towards a degree.

Remed Deg

The total number of registered remedial hours that are creditable towards a degree.

Sess

A code identifying the reporting session for this record (e.g., FA for fall).

Sex

A code identifying the student's gender (M or F).

State

A code identifying the state of residence for this student.

Subpr

The subprogram code under which the student registered in this session.

Sum

A Y (yes) or N (no) indicating whether this is a summarized record for IPEDS reporting.

Tr Inst ID

A code identifying the school this student last transferred from.

Type

A code identifying the type of report that will use this information (e.g., I for IPEDS).

W/draw Date

The date the student withdrew from the session.

Year

A date indicating the reporting calendar year for this record.

Tests/Exams Detail Window

Purpose

The Tests/Exams Detail window enables you to view and enter test and exam scores such as ACT, SAT, and GMAT. Each record on this screen contains information on one test or exam that a student takes.

Example

Following is an example of a Tests/Exams Detail window.

Code	Date	Sess	Year	Prog	Comment
	11/26/1996	0			

Fields

The following describes the fields that appear on the Tests/Exams Detail window.

Code

A code indicating the name of a test or exam that a student has taken.

Example: ACT, GMAT, SAT

Note: If you enter the code for the ACT or SAT exams, the system automatically displays the components of each exam and the corresponding score for each component. For example, when you enter SAT as the exam code, the system displays "Verbal," "Math," "Reading," "Vocabulary," and "TSWE" in addition to a default score of 0 to the right of each component. TSWE refers to the Test of Standard Written English.

Comment

Any additional information you want to enter regarding a test or exam.

Example: Second time to take test

Date

The date (mm/dd/yyyy) on which a student took a test or exam.

Prog

A code linking the test or exam in the Code field to a program.

Example: UNDG for undergraduate program.

Sess

A code indicating the session in which a student took a test or exam.

Example: FA for fall

Year

The year in which a student took a test or exam.

Commands

The following lists the commands you can execute from the Text/Exams Detail window and their purposes:

Add

Places the screen in add mode so you can make entries to add a record.

Back

Lets you to move back through a list of records.

Cancel

Lets you exit from the screen without saving any field entries.

Del-line

Lets you delete a record.

Finish

In query mode, selects the specified ID.

In update mode, saves any field entries and exits from the screen.

Forward

Lets you to move forward through a list of records.

Scroll

Updates the detail window information.

SECTION 5 - MANAGING YOUR PROCESSES

Overview

Introduction

The purpose of this section is to introduce you to the capability in the system to complete tasks in the background, schedule processes for later execution, and suspend tasks.

Ways to Manage Processes

The following lists and briefly describes the methods you can use to manage your processes.

Performing tasks in the background

Executing a program or process that requires no further input, while you access another process or screen in the system.

Scheduling processes

Executing a program at some later specified time or date, instead of executing it immediately.

Suspending tasks

Temporarily freezing a process or screen while you access another process or screen in the system.

Exiting When Tasks are Active

The standard system does not permit you to exit when you are running background tasks, or when you have suspended tasks. If you attempt to exit while such tasks exist, the system will display the message "Background tasks exist," and the menu from which you tried to exit will continue to appear on your terminal.

Note: If desired, your Jenzabar coordinator can override this feature. When you are using the GUI format, you can exit from the menu system while still working in an application, without affecting the processing within the application.

CAUTION: In GUI mode, it is possible to exit from a process using the Windows Exit command. Jenzabar strongly suggests that you do not use this exit approach since it causes processes to end abnormally. If you have background or suspended tasks and wish to leave your terminal, use the Lock Screen option to prevent others from using your terminal in your absence.

Performing Background Tasks

Introduction

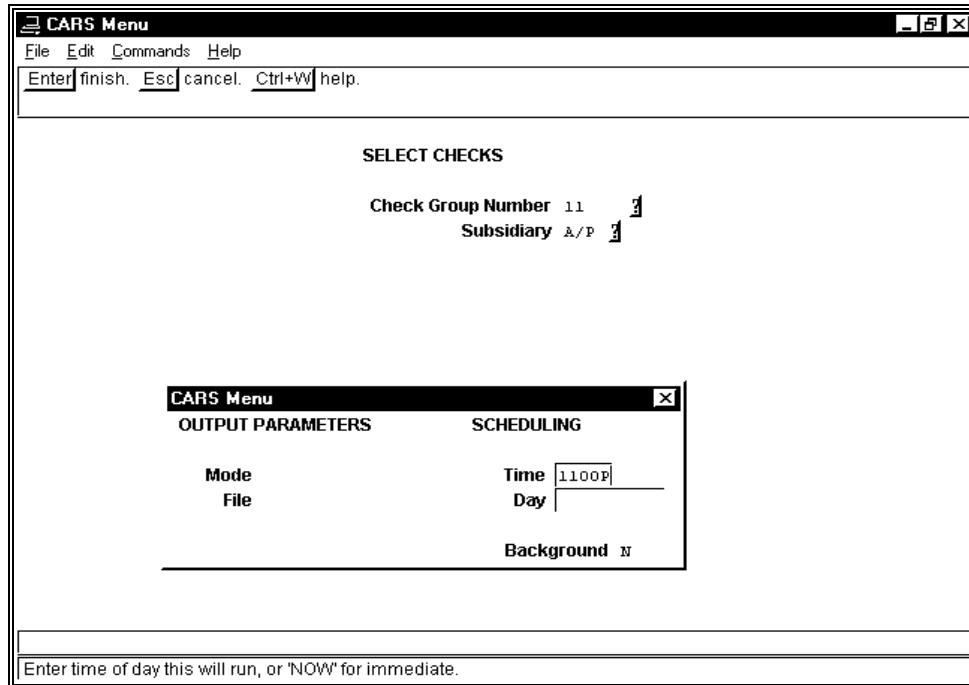
When you must run processes and complete tasks that do not require any further information from you, you can run them in the background. This option is useful because you may continue to use your computer terminal for other work while the system automatically controls the execution of your background task(s). For example, you can run a report in background mode at the same time you use an entry program to enter data.

Background tasks differ from scheduled processes. You submit a task for *immediate* background processing while you continue to work on other tasks. In contrast, you schedule tasks for *later* processing so the system can complete processes that are not time-critical at a less busy time of day, or at the time when the processes are needed.

Note: When you use the system with the GUI interface, you can also run tasks in the background by opening another window and selecting another menu or software package to use.

Using the Output Parameters and Scheduling Window

When you have the ability to execute a task in the background (that is, after you have provided all the information the program needs to complete), the system displays the Output Parameters and Scheduling window, as shown at the bottom of the following example.



Description of Display Contents

The above example display contains two kinds of information, as follows:

- Entry fields where you enter the necessary parameters or other information for completing the process.
- An Output Parameters and Scheduling window into which you enter the output and schedule information for completing the process.

Parameters differ, depending on the requirements of the program. Some programs require ten or more processing parameters, while others, as in the above example, require only one or two parameters.

The Output Parameters and Scheduling window is a standard window that does not change regardless of the program in which it is used.

How To Run a Background Process

Follow these steps to run a process in the background.

1. When the parameter screen appears on your terminal, enter the parameters that the system requires to complete the process, then select **Finish**. The Output Parameters and Scheduling window appears.
2. Does the process create output that you can view, (e.g., a report)?
 - If yes, go to step 3. The cursor appears in the Mode field.
 - If no, go to step 5. The cursor appears in the Time field.
3. Do you want to save the output in a file, or route it to a printer?
 - If you want to use a file, enter **file**, then go to step 4. The cursor moves to the File field.
 - If you want to use a printer, enter the name of the printer, then go to step 5. The cursor moves to the Time field.

Note: On the Output Parameters and Scheduling window, you also have the option of displaying the output on your screen by entering **more** in the Mode field. However, if you want a screen display, you cannot execute the process in the background.

4. Enter a name for the file, or leave the name field blank if you want to use the default. The cursor moves to the Time field.

Note: The system automatically adds a *.out* extension to the file name that you enter in this field. Every program that produces output has a designated default output file name. In most cases, the default file name resembles the name of the program, and contains the extension *.out*.

5. Do you want to start the process now?
 - If yes, enter **NOW** in the Time field and go to step 7. The cursor moves to the Background field.
 - If no, you are not performing a task in the background, but are scheduling a process for later execution. Enter the time you want the process to start. For more information about scheduling processes, see *Scheduling Processes* in this section.
6. Enter **y** in the background field, then select **Finish**. The menu from which you selected the process appears, and the word “Exists” appears next to the Task option on the menu.

Note: The word “Exists” disappears when the process completes; you can select other menu options to complete other work while the process executes in the background; the system sends you electronic mail after the task completes.

Scheduling Processes

Introduction

When you schedule processes, you control the time when the process executes. The standard default for all process execution is 11:00 p.m., but your institution can change the default, or you can override it if desired. Scheduling processes makes the most efficient use of your computer and speeds the response time for the tasks that you must complete.

Using the Output Parameters and Scheduling Window

When you have the ability to schedule a task for later execution (e.g., you have provided all the information the program needs to complete), the system displays the Output Parameters and Scheduling window. This is the same pop-up window that you use to execute processes in the background (for more information, see *Performing Background Tasks* in this section).

How to Schedule a Process for Later Execution

Follow these steps to schedule a process for later execution.

1. When the parameter screen appears on your terminal, enter the parameters that the system requires to complete the process, then select **Finish**. The Output Parameters and Scheduling window appears.
2. Does the process create output that you can view (e.g., a report)?
 - If yes, go to step 3. The cursor appears in the Mode field.
 - If no, go to step 5. The cursor appears in the Time field
3. Do you want to save the output in a file, or route it to a printer?
 - If you want to use a file, enter **file**, then go to step 4. The cursor moves to the File field.
 - If you want to use a printer, enter the name of the printer, then go to step 5. The cursor moves to the Time field.

Note: On the Output Parameters and Scheduling window, you also have the option of displaying the output on your screen by entering **more** in the Mode field. However, if you want a screen display, you cannot schedule the process for later execution.

4. Enter a name for the file, or leave the name field blank if you want to use the default. The cursor moves to the Time field.

Note: The system automatically adds an *.out* extension to the file name that you enter in this field. Every program that produces output has a designated default output file name. In most cases, the default file name resembles the name of the program, and contains the extension *.out*.

5. Enter the time of day that you want to run the process. The cursor moves to the Day field.
6. Enter one of the following, then select **Finish**:
 - The week day on which you want the process to run, (e.g., Tuesday)
 - The date on which you want the process to run, (e.g., Feb 1)
 - The numeric date on which you want the process to run, (e.g., 11301997)

Note: Leave the field blank if you want the process to complete on the current date.

The menu from which you selected the process appears, and the words “Are Queued” appear next to the Sched Procs option on the menu.

- The words “Are Queued” disappear when the process begins.
- You can select other menu options to complete other work while the process awaits execution at the scheduled time.
- The system sends you electronic mail after the task completes.

Suspending Tasks

Introduction

You may sometimes need to go to a specific program or process while using another program. For example, you may need to look up an ID number for a colleague while you are entering another type of information.

When you do not want to completely exit from a task, and you need to go to another process, you can *suspend* the task.

Note: When you use QuickMate, you do not need to suspend tasks to go to another process. Use normal GUI features to minimize, maximize, and open windows, enabling you to move between processes.

CAUTION: If you suspend a task when you are using a specific record (e.g., a student's ID record), the record remains locked *for your use only* until you re-access the task and execute your changes to the record. To ensure that you do not lock records while suspending tasks, Jenzabar recommends that you suspend tasks only when the process you are using is in query mode.

How to Suspend a Task

To suspend a process, simply enter **<Ctrl-z>** while you are using it. The comment line on the screen then displays the name of the program (e.g., "Admissions Entry"), and the notation "(Suspended)". The error line also prompts you to press **<Enter>**. After you press **<Enter>**, the menu from which you selected the suspended task appears, the word "Exists" appears next to the Task option on the menu, and you can select other menu options as desired. The "Task Exists" message is the same as when you process a task in the background.

Note: Unlike the processing of tasks in the background, however, the word "Exists" does not disappear until you access the suspended program and exit from it.

Viewing Your Suspended Tasks

When you want to re-access a process that you previously suspended, you use a different procedure than you used when you originally accessed the task.

Task Window

You use the following Task window to access a previously suspended task. The Task window overlays the menu, listing all the tasks that you have suspended. (You may suspend up to five processes at a time.)

```
F1 foreground. CTRL-C cancel. TAB options.

      [a] Admissions Entry                [d] Display Registrations

----- Task -----      ----- Status -----      ----- PID -----
Admissions Entry                (Suspended)                8424

[ ] <-- Enter Option
```

How to Access a Suspended Task

Use the following procedure to access a task that you previously suspended.

Note: To re-access a window in the GUI-format system, press **<Alt-Tab>** until the name of the process that you want appears, then release the keys.

1. From any menu, select **Tasks**. The Task window appears.
2. Perform one of the following:
 - Select **Foreground**.
 - Select **Options**, and then select **Foreground**.

The program screen that you were using when you suspended the process appears.

Aborting a Suspended or Background Task

You can also use the Task window to abort tasks that you have suspended or executed in the background. If you want to terminate the processing of a background task, use the above procedure, except select **Terminate** in step 2. The system will prompt you to confirm that you want to abort the process.

CAUTION: Although you can use the same procedure to abort a suspended task, Jenzabar strongly recommends that you access the suspended task and exit using normal procedures to prevent the loss of data or processing.

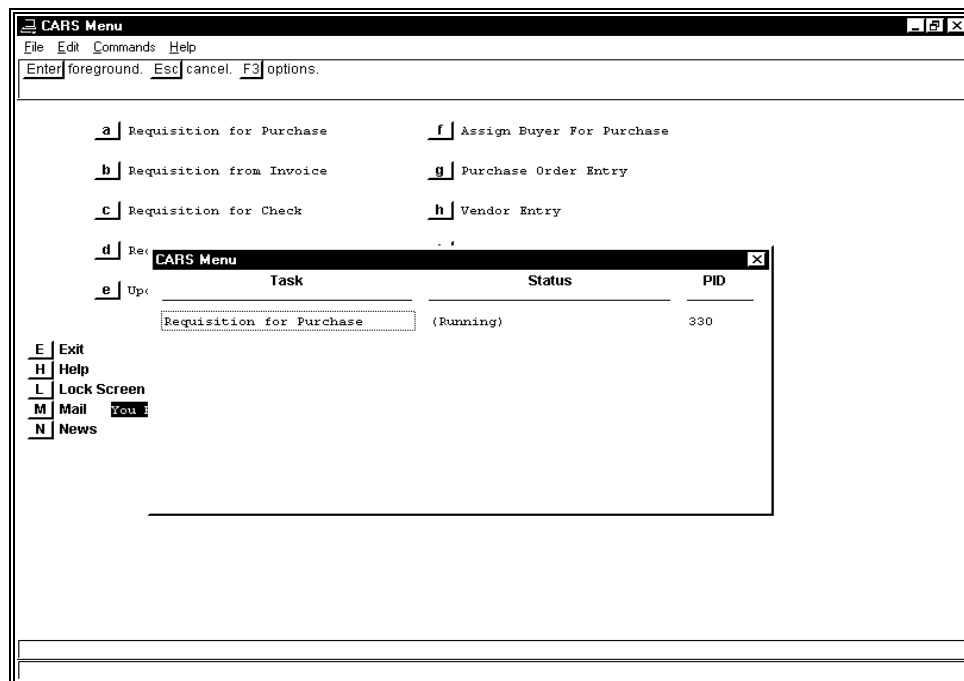
Aborting Scheduled Processes

Introduction

Occasionally, you might schedule a process for later execution and then decide that you do not want the process to execute as scheduled. When this situation occurs, you can use a menu option and the Scheduled Process window to abort the scheduled process.

Scheduled Process Window

You use the following Scheduled Process window to view a previously scheduled task. The Scheduled Process window overlays the menu, and lists all the processes that you have scheduled (if you use the system default you can schedule up to nine processes at a time).



How to Abort a Scheduled Process

Follow these steps to abort processes that you have scheduled for later execution.

1. From any system menu, select Sched Procs. The Scheduled Process window appears.
2. Select **Options**, then select **Remove**. The system displays the message, "Do you really want to remove <program name>?"
3. Select **Yes**. The system displays the following message: "<Enter> to continue"
4. Press <Enter>.
 - The Scheduled Process window disappears.
 - If the process you just terminated was the only process you had scheduled, the message "Are Queued" no longer appears next to the Sched Procs menu option.

Viewing Parameters for a Scheduled Process

Do the following to view the parameters for a scheduled process.

1. Select **Options** from the Scheduled Process window.
2. Select **Process** and Click **OK**. A dialog box displays the report and script to be run and the parameters that will be used at runtime.

SECTION 6 - USING ELECTRONIC MAIL (MAILX)

Overview

Introduction

Jenzabar CX supports the use of various electronic mail programs. The two most commonly used programs are *mailx* and *elm*. Both of these programs promote communication by providing a quick and easy way to send and receive messages, and the two programs are compatible, (e.g., even if a sender composes a message using *mailx*, you can use *elm* to read it and respond to it).

Any time that you are using the system, you can access electronic mail. If you are using a Jenzabar CX program and want to check your electronic mail, you can suspend the program and read or send messages. If you use an alternative mail program (e.g., Microsoft Outlook), you can minimize your Jenzabar CX session and launch your mail program as you usually do.

This section provides information about the *mailx* program. It includes step-by-step procedures for you to follow when you do the following:

- Read electronic mail messages
- Compose and send electronic mail messages
- Manage and maintain your electronic mail message file

Purpose of Electronic Mail

Individuals, institutions and businesses use electronic mail as a way to provide almost instantaneous communication with others, whether they are in the same building, on the same campus, or anywhere in the world. Anyone with a mail login can send and receive electronic mail, and individuals with access to Internet can exchange mail with any other person with Internet access, regardless of their location. In addition, when your processes complete, the system sends electronic mail to inform you of the status of the process.

The following features demonstrate electronic mail's advantages over other forms of communication:

- Electronic mail is quicker to compose and send than more formal letters or memos.
- Electronic mail does not require the use of paper, although you can print messages if desired.
- Electronic mail does not interrupt the recipient.
- Electronic mail provides a copy of a communication that you can organize in electronic files for later retrieval.

Before You Begin

Before you begin to use the following procedures for electronic mail, remember:

- You must confirm that your institution uses *mailx*.
- To send messages, you must know the login username of the message recipient.
- You must know how to use your institution's text editor to edit mail messages.

Command to Use

From any Jenzabar CX menu, select the Mail command to access the electronic mail program that your institution uses.

Mailx Program Screens

Introduction

The mailx program uses unique screens to list messages that you have received and to enable you to compose messages to others.

Note: Your actual mailx program screens can look different, depending on the type of computer your institution uses.

Mail Menu Screen

Following is the Mail Menu screen that you see when you first access mailx from the menu. Its purpose is to provide you with instructions and choices about the way you can use electronic mail.

```
MAIL MENU
          -----
1. Enter the login name of recipient(s), then press <Return> to send mail.
   Separate the names with a blank space or comma.
2. Press <Return> to obtain a list of messages if you are only reading
   the mail.

[                                     ]

Note:  Help is available at the "?" prompt by typing: ? <Return>
       or within the body of a mail message, at the beginning of a new
       line by typing: ~? <Return>
```

Mail Message List Screen

Following is the Mail Message List screen that you see when you want to read your electronic mail. The screen lists the following header information about the mail messages you have received:

- Message number
- Sender
- Time
- Subject

It also provides information about the version of the electronic mail program you are using (e.g., mailx, revision number 70.7), and the date that your institution implemented the version.

Note: Your mail messages display the following codes to the left of the message numbers:

- blank-An existing message
- N - A new message, received since the last time you accessed electronic mail
- U - An existing message that you have not yet read

```
Now running mail
mailx Revision: 70.7      Date 92: 92/04/16 15:39:44      Type ? for help.
"/usr/mail/ncurtis": 4 messages 1 new
  1 bhill@carshp.carsinfo.dcom Wed Jun 14 10:29      25/812      telnet connection
  2 cars-1@carshp.carsinfo.com Thu Jun 15 10:05      43/1842     Re Automatic maintenance
  3 ncurtis@carshp.carsinfo.com Thu Jun 15 16:18      26/774     Re: Online Doc without paper
>N 4 carsu@carshp.carsinfo.com Tue June 20 07:44      18/530     Fixpost: Errors
```

Mail Message Screen

Following is the Mail Message screen that you see when you want to send electronic mail messages. The screen enables you to compose a message for one or more recipients.

```
Enter message (End with 'CTRL D')
Subject:
```

Reading Electronic Mail

Introduction

The menu indicates when you have electronic mail messages to read by displaying the message “You Have Mail” or “New Mail” next to the Mail menu option.

How to Read Electronic Mail

Follow these steps to read electronic mail using mailx.

1. From any system menu, select Mail. The Mail Menu screen appears.
2. Press **<Enter>**. The Mail Message List screen appears.
3. Enter the number corresponding to the message that you want to read. The mail message appears.

Note: If the message exceeds one screenful in length, a colon (:) prompt appears at the bottom of the terminal display; if the message does not exceed one screenful in length, a question mark (?) prompt appears at the bottom of the terminal display.

4. Does a colon or a question mark prompt appear at the bottom of the terminal display?
 - If a colon, press **<Enter>**. Repeat until you finish reading the message.
 - If a question mark, read the message, then do one of the following:
 - Perform other mail tasks as desired
 - Enter **q** to quit, displaying the system menu

The next screenful of information appears.

Note: When the last screenful of message information appears, the colon at the bottom of the screen is preceded with the notation (EOF), or *end of file*. When you press **<Enter>**, the question mark prompt appears.

Sending Electronic Mail Messages

Introduction

The Mail Menu screen that you access when you first enter electronic mail instructs you in how to initiate a mail message that you want to send. To send messages, you must know the login (or mail alias) name of the mail recipient(s).

How to Send Electronic Mail

Follow these steps to send electronic mail using mailx.

1. From any menu, select Mail. The Mail Menu screen appears, and the cursor appears in the brackets where you can enter mail recipient names.
2. Enter the login name(s) of the recipient(s) for your mail message, then press **<Enter>**. The Mail Message screen appears, with the cursor in the Subject field.

Note: To send your message to more than one person, enter the login names (separated by a single space, or a space and a comma), as in the following example:

[jdoe dbrown swilson] or [jdoe, dbrown, swilson]

3. Enter a title for the mail message (up to 25 characters in length), then press **<Enter>**. The cursor moves to the blank line below the Subject prompt.
4. Do the following:
 - Type the message that you want to send, pressing **<Enter>** when you reach the end of the line.
 - If you make a mistake in your message, you can correct the error as long as your cursor is still on the same line as the error. After the cursor is on a subsequent line, you cannot correct the error without using editing commands.
 - If you use the vi text editor (the default editor for Jenzabar CX), your Jenzabar coordinator can set up your .exrc file so your text lines wrap automatically.
 - When you complete the message, press **<Enter>** to access a blank line.
 - Press **<Ctrl-d>**.

The carbon copy prompt (Cc:) appears.

Note: Your Jenzabar coordinator can delete this prompt if desired.

5. Enter the login name(s), if any, for persons to whom you want to send copies of the message, then press **<Enter>**. The menu from which you accessed electronic mail appears.

Other Mailx Electronic Mail Options

Introduction

Although the primary tasks that you will perform in electronic mail relate to reading and sending messages, mailx enables you to perform some other functions.

Purpose of the Mailx Commands

The mailx electronic mail commands and options described in this section enable you to delete unneeded messages, save important messages in files, respond to messages, view the header information for the messages in your message list, and exit from the electronic mail program.

Commands for Electronic Mail Options

The following is a list of the most common commands you can use to perform other mailx functions. Enter any of these commands at the question mark (?) prompt.

Note: In the following list, *msg#* and *#* signify the number associated with a mail message. From within the electronic mail program, you can view a help screen that lists these commands by typing ? at the question mark prompt.

delete *msg#*

Deletes the related message number, (e.g., deletes message number 10 from your message list).

Key Entry: d#

display other messages

Displays the next ten mail message headers in your message list, (e.g., if you are displaying the header list for messages 11-20, displays the headers for messages 21-30).

Key Entry: z

display other messages

Displays the previous ten mail message headers in your message list, (e.g., if you are displaying the header list for messages 11-20, displays the headers for messages 1-10).

Key Entry: z-

exit

Enables you to quit your current electronic mail session, and *not* delete the messages that you selected for deletion during the session.

Key Entry: x

from *msg#*

Displays the header line of the mail message, (e.g., displays the header line of message number 10 on your terminal).

Key Entry: f#

header

Displays the list of header information for your received mail messages.

Key Entry: h

help

Displays a list of electronic mail commands and explanations.

Key Entry: ?

list

Lists the commands you can use in electronic mail, without any explanation of the commands.

Key Entry: l

mail username

Enables you to compose a mail message to the specified user (e.g., enables you to write a message for jdoe).

Key Entry: m name

next

Displays the next mail message on the message list.

Key Entry: n

quit

Enables you to quit your current electronic mail session, deleting the messages that you selected for deletion.

Key Entry: q

reply (group) msg#

Enables you to respond to the author and all the recipients of a specific message, (e.g., enables you to send a message to the author, and other recipients, of message number 10). The command also completes the subject for you (e.g., if the original message subject was "meeting," the subject of your response is "Re: meeting.>").

Key Entry: r#

reply msg#

Enables you to respond to the author of a specific message (e.g., enables you to send a message only to the author of message number 10). The command also completes the subject for you (e.g., if the original message subject was "meeting," the subject of your response is "Re: meeting.>").

Key Entry: R#

save msg# filename

Saves a message in a specified file in your home directory (e.g., saves message number 10 in a file called *testfile*).

Key Entry: s# name

Note: When you save a message in a file, electronic mail automatically deletes the message from your electronic mail message list when you exit from mailx using the **quit** command. If you exit from mailx using the **exit** command, the saved message remains in your mail message list.

type msg#

Displays the named mail message (e.g., displays message number 10 on your terminal).

Key Entry: t#

undelete msg#

Restores a message that you previously selected for deletion (e.g., restores message number 10 to your message list).

Key Entry: u10

Note: You can only restore messages you have selected for deletion during your current electronic mail session.

Electronic Mail Editing Commands

When you are composing a mail message using mailx, you can use a variety of special editing commands to customize your message. The following lists and describes the most common editing commands you can use.

Note: You can view a help screen that lists these commands by entering `~?` at the beginning of a line in a mail message.

blind copy username

Enables you to send a copy of your message to the designated username, without listing the name of the recipient on the message (e.g., sends the message to `jdoe`).

Key Entry: `~b name`

change subject

Enables you to change the subject of the mail message (e.g., changes the message subject from the original subject to `title2`).

Key Entry: `~s subject`

copy username

Enables you to send a copy of your message to the designated username, listing the name of the recipient on the message (e.g., sends the message to `dbrown`).

Key Entry: `~c name`

edit

Enables you to access your institution's text editor so you can correct errors in the message you are composing or perform other editing tasks.

Key Entry: `~v`

exit

Enables you to exit from the message you are composing, without saving the message.

Key Entry: `~X`

quit

Enables you to exit from the message you are composing, saving the message in your `dead.letter` file.

Key Entry: `~q, ~Q`

read in dead letter file

At the current cursor location, reads in the contents of the `dead.letter` file.

Key Entry: `~d`

Note: The `dead.letter` file contains undelivered mail messages. Messages are undelivered under the following circumstances:

- If they contain errors
- If the addressee is unknown
- If you previously abandoned the message while you were composing it

read in filename

At the current cursor location, reads in the contents of the specified file (e.g., reads the contents of `testfile` into the mail message).

Key Entry: `~r file`

send to username

Enables you to send a copy of your message to the designated username (e.g., sends the message to `swilliams`).

Key Entry: `~t name`

SECTION 7 - USING ELECTRONIC MAIL (ELM)

Overview

Introduction

Jenzabar CX supports the use of various electronic mail programs. The two most commonly used programs are *mailx* and *elm*. Both of these programs promote communication by providing a quick and easy way to send and receive messages, and the two programs are compatible (e.g., even if a sender composes a message using *mailx*, you can use *elm* to read it and respond to it).

Any time you are using the system, you can access electronic mail. If you are using a Jenzabar CX program and want to check your electronic mail, you can suspend the program and read or send messages.

This section provides information about the *elm* program. It includes step-by-step procedures for you to follow when you do the following:

- Read electronic mail messages
- Compose and send electronic mail messages
- Manage and maintain your electronic mail message file

Note: Contact your Jenzabar coordinator for more information about other *elm* options.

Purpose Of Electronic Mail

Individuals, institutions and businesses use electronic mail as a way to provide almost instantaneous communication with others, whether they are in the same building, on the same campus, or anywhere in the world. Anyone with a mail login can send and receive electronic mail, and individuals with access to Internet can exchange mail with any other person with Internet access, regardless of their location. In addition, when your processes complete, the system sends electronic mail to inform you of the status of the process.

The following features demonstrate electronic mail's advantages over other forms of communication:

- Electronic mail is quicker to compose and send than more formal letters or memos.
- Electronic mail does not require the use of paper, although you can print messages if desired.
- Electronic mail does not interrupt the recipient.
- Electronic mail provides a copy of a communication that you can organize in electronic files for later retrieval.

Before You Begin

Before you begin to use the following procedures for electronic mail, remember:

- You must confirm that your institution uses *elm*.
- To send messages, you must know the login username of the message recipient.
- You must know how to use your institution's text editor to compose mail messages.

Command to Use

From any menu, select the Mail command to access the electronic mail program that your institution uses.

Elm Mail Program Screens

Introduction

The elm program uses unique screens to list messages that you have received and to enable you to compose messages to others.

Note: Your actual mail program screens can look different, depending on the type of computer your institution uses.

Mail Message List Screen

Following is the Mail Message List screen that you see when you first access elm from the menu. The screen lists the following header information about the mail messages you have received:

- Message number
- Date
- Sender
- Size of message
- Subject

The screen also provides information about the version of the electronic mail program you are using (e.g., elm, revision number 70.85.2.1).

Note: Your mail messages display the following codes to the left of the message numbers:

- blank A message you have already read
- D A message that you want to delete
- N A message that you have not read

```
Mailbox is '/usr/mail/username with 10 message(s) [Elm revision: 70.85.2.1]

 1 Jun 19 Karen                (42)   Re: diskettes
 2 Jun 20 Patricia            (17)   vacation
 3 Jun 20 Christine           (33)   research question
 4 Jun 20 Grant Davis         (25)   Student Accounts
 5 Jun 20 Delaney, Albert     (20)   System upgrade
 6 Jun 21 Edwards, Rita      (31)   Calculating interest
 7 Jun 22 Marks, Jason       (19)   Completing reports
 8 Jun 23 Frank Miller       (22)   Scheduling conference rooms
 9 Jun 23 CARS Database Supe (48)   [a] G/L Report
10 Jun 25 root@carshp.carsin (12)

You can use any of the following commands by pressing the first character:
D)delete or U)ndelete mail, M)ail a message, R)eply or F)orward mail,,Q)uit
To read a message, press (return), j = move down, K = move up, ? = help

Command:
```


Reading Electronic Mail

Introduction

The menu indicates when you have electronic mail messages to read by displaying the message “You Have Mail” or “New Mail” next to the Mail menu option.

How to Read Electronic Mail

Follow these steps to read electronic mail using elm.

1. From any menu, select Mail. The Mail Message List screen appears.

Note: This screen displays ten messages at a time. If your message file contains more than ten messages, you must use the **move down** or **move up** commands to scroll through your messages. You can also press your spacebar to move down through your mail message list.

2. Do one of the following:
 - Enter the number that corresponds to the message that you want to read.
 - Use the **move down** or **move up** commands, or your spacebar, to highlight the header line for the message that you want to read, then press **<Enter>**.

The mail message appears.

Note: If the message exceeds one screenful in length, a highlighted message appears at the bottom of the screen with your command options (e.g., “30 line(s) left (47%) : press <space> for more, or ‘q’ to return”). If the message does not exceed one screenful in length, a highlighted message appears at the bottom of the screen with your command option (e.g., “Please press <return> to return to Main:”).

3. Does the message exceed one screenful in length?
 - If yes, press the spacebar to view the rest of the message, until the entire message has appeared, and the Mail Message List screen appears. You can now read other messages or perform additional tasks in elm as desired.
 - If no, press the spacebar to view the Mail Message List screen.

Sending Electronic Mail Messages

Introduction

The Mail Message List screen contains a command line on which you can enter a variety of commands. The most common command you enter on the command line is to initiate a mail message that you want to send.

How to Send Electronic Mail

Follow these steps to send electronic mail using elm.

1. On the Mail Message List screen, select the **Mail a Message** command. Elm displays the prompt, "Send the message to:".
2. Enter the login name(s) of the recipient(s) for your mail message, then press **<Enter>**. Elm displays the prompt, "Subject of message:".

Note: To send your message to more than one recipient, enter the login names separated by a single space.

3. Enter a title (up to 35 characters) for the mail message, then press **<Enter>**. Elm displays the prompt, "Copies to:".
4. Enter the login name(s) of the individuals whom you want to receive copies of the message (if any), then press **<Enter>**. The Mail Message screen appears.
5. Using the text editor at your institution, compose the mail message that you want to send, then exit from the message using the text editor commands. Elm displays the prompt, "Please choose one of the following options by the first character E)dit the message, edit the H)eaders, S)end it, or F)orget it:"

Note: The default is to S)end the message.

6. Do one of the following:
 - Press **<Enter>** to accept the default
 - Press **s** to send the message

Note: Other options include the following:

- Press **e** to edit the body of the message
- Press **h** to change the subject or the recipients
- Press **f** to discard the message

The Mail Message List screen appears.

Other Elm Electronic Mail Options

Introduction

Although the primary tasks that you will perform in electronic mail relate to reading and sending messages, elm enables you to perform some other functions.

Purpose of the Elm Commands

The elm commands and options described in this section enable you to delete unneeded messages, save or print important messages, respond to messages, view the header information for the messages in your message list, forward messages to others, and exit from elm.

Commands for Elm Options

The following lists the commands you can use to perform the most common other functions in elm.

Delete mail

Deletes the highlighted message.

Keystroke: d

Note: When you exit from elm, the program asks you to confirm if you want to delete the messages you marked for deletion. Until you exit from elm, you can *undelete* any marked messages.

Forward

Forwards the highlighted message. When you select this command, the system displays the following prompts:

<u>Prompt</u>	<u>Default</u>
Edit outgoing message?	Yes
Send the message to:	None
Subject of message:	<i>original message subject (fwd)</i>
Copies To:	None

Keystroke: F

Group reply

Enables you to respond to the author and all the recipients of the highlighted message.

When you select this command, the system displays the following prompts:

<u>Prompt</u>	<u>Default</u>
Copy message?	Do not include the original message in the response.
Subject of message:	Re: <i>original message subject</i>
Copies To:	All the original recipients

Keystroke: g

Options

Displays a list of the elm processing options that you are currently using. These options include the following:

- The name of the file you use for calendar reminder mail messages
- The name of the text editor that you use in elm
- The name of the directory where elm stores your mail messages
- The criteria by which your messages are sorted in your message list
- The name of the printer on which you want to print your messages
- Your name that appears on the message header line of the messages you send
- Your user level

Note: Your user level controls the contents of the command line, (e.g., the advanced user can view more command options than the beginning user).

Depending on the options that you want to change or view, elm prompts you to enter the correct information.

Keystroke: o

Quit

Enables you to exit from elm. When you select this command, elm displays the following prompts:

<u>Prompt</u>	<u>Default</u>
Delete message(s)	Yes, delete messages marked for deletion
Keep mail in incoming mailbox?	Yes, maintain the messages that are marked for deletion

Note: After you exit, elm displays a message similar to the following example: “[keeping 9 message(s), and deleting 1]”

If you attempt to exit from elm when a new message is added to your message list, elm displays the following message: “New mail!! Quit canceled....”

Keystroke: q

Reply

Enables you to respond to the author of the highlighted message. When you select this command, the system displays the following prompts:

<u>Prompt</u>	<u>Default</u>
Copy message?	Do not include the original message in the response
Subject of message:	Re: <i>original message subject</i>
Copies To:	None

Keystroke: r

Undelete

Undeletes the highlighted message, if you had previously marked it for deletion.

Keystroke: u

Note: This command has no effect on messages that are not marked for deletion.

SECTION 8 - MANAGING YOUR FILES

Overview

Introduction

This section provides information and step-by-step procedures for you to follow when you view and organize the files in your home directory.

Before You Begin

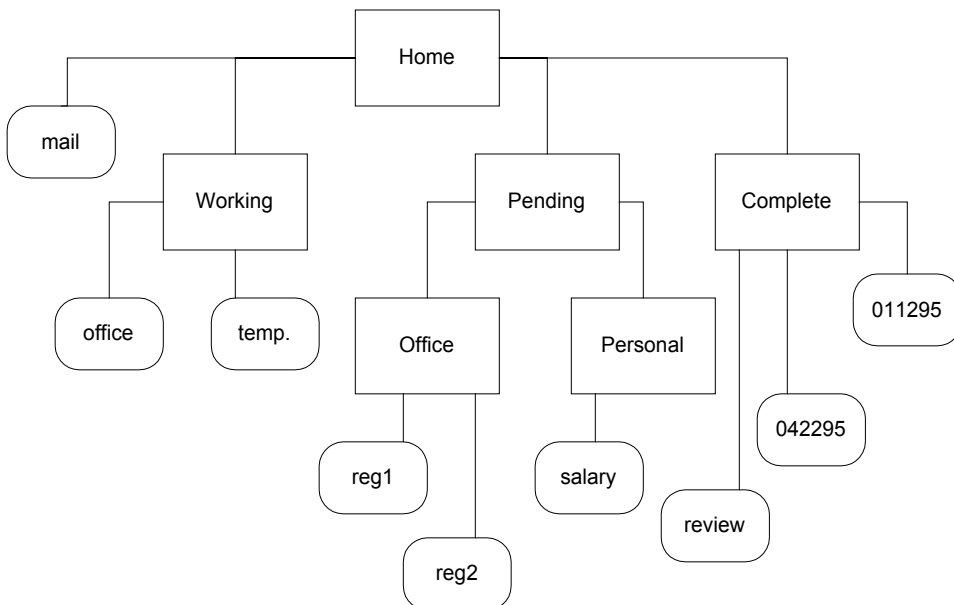
Before you begin to use the following procedures for viewing and organizing the files in your home directory, remember the following:

- Every system user has a home directory.
- By default, all the file handling options on the Utilities menu relate to your home directory. You must know the path name for other directories.
- Home directories for menu users contain files from the following sources:
 - Saved mail messages
 - Files that you create for your own purposes
 - Output from various Jenzabar CX processes

Directory Structure

Jenzabar created CX with an organized *directory* and *subdirectory* structure. Directories and subdirectories do not contain information; instead they contain *files* that contain information.

The following diagram illustrates how you might organize your directory structure:



Note: In the above diagram, directories and subdirectories appear as follows:



In the above diagram, files appear as follows:



Menu Location for File Handling Options

All Jenzabar CX users can access the file handling options by making the following menu selections:

- [U] Utility menu
- [g] File Options

Viewing a List of Your Files

Ways to View Your Files

You can view a list of your files in several different ways. The following lists the ways you can list your files, and the menu options you must select to list the files.

List Files in Long Format

This allows you to view the following information in alphabetical order

- Filenames
- File permissions
- File owner
- Size of file
- Date and time created

List Files in Time Order

This allows you to view the following file information in order of creation.

- Filenames
- File permissions
- File owner
- Size of file
- Date and time created

List Names of Files

Lists file information on filenames only, in alphabetical order.

How To Use the File Listing Options

When you want to view a list of your files, you must provide the system with the following information:

- The directory path for the filenames that you want to view.
- The printer to which you want to route the list. The default is to route the list to your terminal display, using the **more** command.

Managing Your Files

Introduction

Using the menu, you can perform a variety of maintenance tasks with the files in your directories and subdirectories.

File Maintenance Options

The following lists and describes the options on the Utilities: File Options menu that enable you to maintain the files in your directories and subdirectories. It also includes the information you must supply to perform each task.

Use this option ...	To complete this task ...	By entering this information ...
Change Name of a File	Rename a file	<ul style="list-style-type: none"> The old filename The new filename
Copy File to Another File	Create a duplicate of a file	<ul style="list-style-type: none"> The original filename The filename for the copy
Count Words in File(s)	Review the following information about a file: <ul style="list-style-type: none"> Number of lines Number of words Number of characters Filename The system displays this information on a single line, as in the following example: <pre> 3 16 102 test lines words letters filename </pre>	The filename
Display File to Screen	Display the contents of the file on your terminal screen	The filename
Download File	Transmit a file from Jenzabar CX to a PC Your Jenzabar coordinator must set up permissions for you to download a file.	The filename
Print File	Produce a hard copy of a file	<ul style="list-style-type: none"> The name of the printer The number of copies to print The name of the form that you want to use to print the file The filename
Remove a File	Delete a file	The filename

Use this option ...	To complete this task ...	By entering this information ...
Search Files for String	Search files for specified words or phrases	<ul style="list-style-type: none"> • The words or phrases you want to locate • The filename(s) you want to search • The location to which you want to route the output (enter more to display the list on the screen, or the name of the printer you want to use)

SECTION 9 - LOCATING AND ENTERING DATA

Overview

Introduction

Jenzabar provides a variety of programs you can use to locate and enter data into the system. The primary types of information you may need to enter are as follows:

- Information about individuals
- Information about financial transactions

Individuals can include prospects, applicants, students, institutions, churches, vendors, employees, parents, and constituents. The most basic name and address information about individuals appears in the ID record, although a variety of demographic, academic, and historical information can be stored in related records to provide a complete electronic trail of the individual's interactions with your institution.

Financial transactions arise automatically from a variety of processes, including Accounts Payable, Payroll, Student Billing, Extended Notes Payable, Donor Accounting, and Fixed Assets. The Controller's office at your institution can also initiate financial transactions and adjustments.

Because of its specialized nature and the permissions required, entering financial data is beyond the scope of this guide. However, since similarities exist in all the entry programs for individuals (e.g., ID Entry, Admissions Entry, Student Entry, Vendor Entry, and Constituent Entry), this section contains the procedures you need to use to view existing records on your database and to add new records.

Introduction to the ID Record

The ID record is the most basic type of data in your system. These records become part of database in two primary ways: from other automated sources through an interface or conversion process, and from the manual data entry process. Although several data entry programs exist within the system, all the entry programs require that you perform similar procedures.

Even though the ID record contains the most basic information about an individual, supplemental information about these entities exists in other related records. For example, a School record supplies information about a school's CEEB number, college fair date, public/private status, and enrollment; a Profile record contains data about a person's birthdate, birthplace, religion, and ethnic origin. The system connects the related records to the ID record with the ID number, a system-generated number that appears in the top left corner of every standard ID entry screen.

Before You Begin

Before you begin to use the following procedures for viewing, adding, and updating ID information, remember:

- An ID record must exist for every individual that you want to use for reporting from the database.
- Entry programs access and add not only ID record information, but also the supporting records that contain demographic or historical data.
- Individuals whom you identify as *leads* can be an exception to this rule, because of the volume of leads and the likelihood that the leads will not become active prospects or applicants.
- Check with your Jenzabar coordinator regarding your institution's policies and permissions for adding or updating ID records.
- You can refer to Jenzabar's user guides for specific instructions for completing more complex program screens.

The Process

The following list shows the general phases that take place before, during, and after viewing, adding and updating ID information.

Note: The following process (and the procedures in this section) assume that you are using the ID Entry program. The process and procedures are similar for all other entry programs.

1. Obtain all the information about the person or other entity for whom you want to add an ID.
2. Access the entry program.
3. Perform a query to ensure that the entity does not already have an existing ID record on your system, or to view information that already exists on your database for the entity.
4. If no ID record exists, enter all the available information about the entity, and save the information you enter. The system automatically updates and maintains the appropriate records for the entity.
5. If an ID record exists and you want to change the information in the record, enter the changes, and save the information you enter. The system automatically updates and maintains the appropriate records for the entity.

ID Entry and Query Screens

Introduction

When you enter or query ID information, you use program screens, specifically called form screens. Form screens are electronic representations of paper forms that contain name and address information. Your institution can customize these form screens to match the paper forms that you use for data entry.

ID Entry Screen Example

Following is an example of a completed ID Entry screen in the standard system. Remember that your entry screen can differ, based on the customizations at your institution. The commands appear at the top of the screen. In GUI-based screens, you can position your mouse over the command icon to view the name of the commands.

The screenshot shows a window titled "Admissions Entry - ID Form" with a menu bar (File, Edit, Commands, Help) and a toolbar with icons for checkmark, close, print, and help. The form contains the following data:

ID No	9479	SS No	326-19-6887	Add Date	
Title	MR Mr.	Last Update		Telephone	
Name	Davis, Jack				
Suffix	Jr.				
Address	2433 Pioneer Pike				
City	Lexington				
State/Zip	TN 38351	Country	USA		
Deceased	N	Date			
Sex	M				
Correct Address	Y				
Address Code	PERM				

At the bottom of the window, there is a text prompt: "Enter social security number. Format: ### ## ####."

ID Entry Screen Modes

Screens and programs change *modes* as the type of processing changes. For example, in many cases, the first step you must perform is to locate an ID number, so the screen appears in *query mode*. After you locate the ID or determine that the ID does not exist on your database, the screen changes to *display mode*, from which you can select *update mode* (in which you can change the selected record) or *insert mode* (in which you can add a new record). When you complete your data entry, you execute the program, saving your work, and the screen mode changes to reflect the program execution.

Entry screens can operate in the following modes:

Add

The mode that allows you to add a new record to the database. You should always perform a query to ensure that the record you want to add is not already in your database. If the system cannot find the record, you can enter that record in add mode. Note that some screens also include insert mode; it provides the same capabilities as add mode.

Auto-mode

The mode that automatically accesses query mode for you to select a record, then automatically accesses update mode so you can update the record.

Display

The mode for an employee who is not authorized to add or update information, but is authorized to access and view information. In addition, entry screens appear in display mode before you select the commands that change the mode.

Query

The mode that allows you to select a record from the database. You select **Query** or **Auto-mode** to access this mode.

Update

The mode that allows you to update a record that already exists on the database. You select a record from the database using **Auto-mode** or **Query**, or select **Update** after using **Query** to select a record from the database.

ID Entry Screen Commands

As the screen mode changes, the command line also changes to display the commands that you need to work in the current mode. For example, you use different commands in query mode than you use in update mode. You can use only the commands that appear on the command line.

The screen example in this section displays the commands you can use in display mode. The following is a list of the descriptions of *all* the commands that can appear on an entry screen, regardless of the mode in which the screen operates.

Note: You can use the following commands on either character-based or GUI-based screens.

Auto-mode

Displays the query screen in query mode, then automatically enters update mode.

Cancel

Allows you to do any of the following without saving the information you have entered:

- Return to the previous command line
- Return to the previous window

Detail window (Scroll)

Displays the detail window types associated with the program screen.

Exit

Ends processing in the program you are using, and displays the menu from which you accessed the program.

Find ID

Displays the query screen so you can enter search criteria for the record you want to locate.

Finish

Allows you to add and save information to the database once you have completed your data entry.

Note: This command also executes programs.

ID-type

Displays a view-only window containing information about an individual or organization associated with your institution. The window contains a variety of logical (Y/N) fields; the values vary, depending on the types of records that exist on your database for the selected ID.

Example: If the student has a Student Enrollment record, the field for Student contains a "Y"; if you use the Vendor Entry program to enter the ID record, the field for Business contains a "Y".

Insert

Allows you to add a new record to the database.

Menu

Displays a list of forms from which you can select the type of data entry you want to perform, (e.g., applicant, school, or church).

Next

Allows you to move to the next consecutive screens when an entry screen contains multiple screens, or move between consecutive options that have multiple screens for display.

Query

Displays the Name/Social Security Number Query screen that you use to locate the ID record of a specific person.

Select

Locks the displayed record so you can view or update it.

Types of Fields On Program Screens

The fields that appear on program screens contain data elements for the Jenzabar CX records and tables. The following four types of fields can appear on the screens:

Default field

Information appears automatically in a default field. Unless the field is also a display-only field (which you cannot change), you can take the following actions when the cursor is in a default field:

- Accept the default value by:
 - Advancing to the next field (using the **<Tab>** key in the GUI-based format, or the **<Enter>** key in the character-based format)
 - Clicking in another field
- Enter an alternate choice to override the default value

Display-only field

The cursor does not move into a display-only field. As a result, you cannot make changes to information in this field.

Optional entry field

Entry of information into this field is optional. You can take the following actions when the cursor is in an optional entry field:

- Enter information into the field
- Move the cursor through the field and leave it blank

Note: To move the cursor, use the **<Tab>** key in the GUI-based format, or the **<Enter>** key in the character-based format.

- Click in another field and leave the field blank

Required entry field

You are required to enter information into this field. You cannot save your entries until you make an entry in the field.

Fields On the ID Entry Screen

The following lists and describes the fields on the ID Entry screen. Remember that you can customize this screen to contain the fields that your institution uses, and to present the fields in the order on which they appear on your data entry forms.

Note: In the GUI-based version of the system, you can use table lookup to assist you in completing the fields whenever a question mark (?) appears on a button to the immediate right of the field. The question mark button appears only when the entry program is in update or insert mode. For more information about table lookup, see *Using Table Lookup* in this section.

Add date

The system-maintained date on which your institution added the ID record to the system.

Address

The number and street address of the entity.

Address code

A four-character code that indicates the type of address that appears on the ID record, [e.g., LOC (local), SUMR (summer), PERM (permanent)].

City

The city of residence of the entity.

Correct address

Y or **N** field that indicates whether the address on the record is correct.

Country

The country of residence of the entity.

Date (deceased)

The date on which the individual died.

Deceased

Y or N field that indicates whether the individual is deceased.

ID No.

The system-generated number that uniquely identifies the ID record and the entity.

Last updated

The system-maintained date on which your institution last updated the ID record.

Name

The name of the entity. For a person, the format must be in the following format:
Lastname, Firstname, Middle., Name suffix.

Example: Jones, David J., Jr.; Brown, Melissa R.; Adkins, Thomas

State/Zip

The two-character state code, and the zip code of residence of the entity.

Suffix

The title suffix for the entity, (e.g., M.D., D.D.S., Esq.).

Telephone

The area code and telephone number of the entity.

Title

The entity's title, (e.g., MR, MS, HON.).

Query Screen

The Query screen enables you to enter search criteria about an individual or entity for which your institution maintains an ID record. The screen contains some of the most basic information that appears on the ID Entry screen. Regardless of the program or application from which you initiate a query, this screen appears.

Note: For descriptions of the fields on this screen, see the field descriptions for the ID Entry screen.

Query Screen Commands

The following lists and describes the commands that you can use on the Query screen. Note that on the GUI-format screen, you can access the commands in any of the following ways:

- Pressing the corresponding keys on your keyboard
- Clicking on the icons
- Selecting **Command** from the menu line and then selecting the desired command from the list of commands that appears

Cancel

Allows you to do any of the following without saving the information you have entered:

- Back out of the current command
- Return to the previous command line
- Return to the previous window

Finished

Communicates to the system that you have completed your data entry or selection.

Help

Displays help about phonetic searches, and the screen, commands and keystrokes.

ID type

Displays a view-only window containing information about an individual or organization associated with your institution. The window contains a variety of logical (Y/N) fields; the values in the fields vary, depending on the types of records that exist in the system for the selected ID.

Example: If the student has a Student Enrollment record, the field for Student contains a “Y”. If you use the Vendor Entry program to enter the ID record, the field for Business contains a “Y”.

List IDs

In display mode, displays the name list from which you selected the ID record that appears on the screen.

Parameters

In query mode, displays the ID Query Parameters window. This window controls the extent of the search that the system performs in response to your query. Fields on the ID Query Parameters window are as follows:

- *Phonetic matching:* Enter **Y** to conduct a Soundex search that locates IDs for names that are similar to the name that you enter, (e.g., if you enter Smith, John, the system will locate the record for Smythe, Jon).
- *ID Record Names:* Enter **Y** to search the ID records for the name that you enter.
- *Alternate Names:* Enter **Y** to search other name-related records on the system for the name that you enter, (e.g., the Addressee record that contains maiden names or nicknames).
- *Alternate Name Style:* Enables you to specify the type of alternate name search you want to use. Valid codes are (F)ormal, (I)nformal, (M)atriculation, (N)ickname, (P)revious, or blank (for all).

Previous

In display mode, fills the Query screen with the search criteria you used for the previous query.

Query IDs

In display mode, displays the empty Query screen so you can enter more or different query search criteria.

Performing a Query

How To Locate an ID

When you perform a query for an ID record, you use the Find ID feature. Follow these steps to complete a query, using Find ID.

1. Access an entry screen.
2. Select **Query**. The Entry screen enters query mode.
3. Do you know the ID number or social security number?
 - If yes, enter the number in the ID field, and go to step 10.
 - Note:** If you enter a social security number, it must be in the format 999-99-9999 (for example, 123-554-5667). The social security number will be recognized in the ID field by its format.
 - If no, go to step 4.
4. Select **Find ID**. The ID Query screen appears.
5. Do you want the system to search by social security number or by name?

If by social security number, go to step 6.

If by name, do the following :

 - Type the name in the Name field, as in the following example: Doe, John D.,,Jr.
 - Jenzabar suggests that you use the asterisk (*) wildcard character with the last name to query on various names and nicknames. For example, enter Doe, J* to return all the individuals with a first initial of J, and a last name of Doe.
 - You can also enter other information that you know about the individual, (e.g., the city or state of the address).
 - Go to step 8.
6. To search by social security number, do the following:
 - Move the cursor to the SS No field.
 - Type the social security number using this format: 999-99-9999 (for example, 123-554-5667).
 - Select **Finished**.
 - If the system locates the record for the social security number that you enter, it displays the information in the record on the ID Query screen.
 - If the system does not locate the record for the social security number that you enter, it displays the message, "There are no records satisfying the conditions."
7. Did the system locate the record for the social security number that you entered?
 - If yes, review the information on the screen as desired, then exit from the program or complete other queries.
 - If no, go to step 5.
8. Do you want to specify the type of name search the system uses?
 - If yes, do the following:
 - Select Parameters. The ID Query Parameters window appears.
 - Go to step 9.
 - If no, select **Finished**, then go to step 10.
9. Enter the appropriate codes in the fields, select **Finished** twice, then go to step 10.

10. Did the search find more than one ID record that meets your search criteria?
- If yes, a list of names appears. Go to step 11.
 - Note:** The name list contains the following information:
 - *Match code*: Indicates if the record exactly matches your search criteria (I), or if it matches based on a phonetic search (IP).
 - *Number*: Provides a means of selecting the record.
 - *Name, City, State, Zip*: Contain the name and address information in the located record.
 - If no, go to step 12. The ID Query screen displays the information in the record.
11. Do you see the name you are searching for on the window?
- Note:** Select **Forward** to view more names.
- If yes, do the following:
 - Type the number corresponding to the name, and press **<Enter>**.
 - Go to step 12.
 - If no, select **Cancel** twice and go to step 5.
12. Does the information on the ID Query screen correspond to the individual for whom you are searching?
- If yes, select **Finished**.
 - If no, do the following:
 - Select **Find ID**.
 - Select **Cancel** twice.
 - Go to step 5.

Adding an ID Record

Querying First

When you add an ID record for an individual, the system creates a unique ID number to identify the record. All other records that the system maintains for the individual also will contain this unique ID number. For this reason, Jenzabar emphasizes that you should *always* perform a query for an individual before you add an ID. If you add an ID for an individual who already has an ID record on the database, you create processing complications.

Note: If you inadvertently create a duplicate ID record, contact your Jenzabar coordinator as soon as you discover the duplication. The Jenzabar coordinator can also use a process called Dupid that identifies ID records that appear to be duplicates. After you determine that one or more records are duplicates, you must resolve them manually. By resolving the duplicates manually, you ensure that a duplication does, in fact, exist, and that the consolidated records contain complete and correct information.

How To Add an ID Record

The following is a list of the steps to use when you add an ID record. It includes a summarized version of the procedure to complete a query before you add a record, to ensure against your adding a duplicate ID. For more detailed information about the options available when you perform a query, see *How to locate an ID* in this section.

1. Access the entry screen.
2. Select **Query**.
3. Select **Find ID**.
4. Enter search criteria, then select **Finished**, setting parameters for the search if desired.
5. Search the name list for the name you intend to enter; select **Cancel** when you complete your search.
6. Select **Cancel** again to exit from query mode.
7. Select **Insert**.
8. Enter all the information about the person or entity, then select **Finished** when you are done.

Note: Before you finish your data entry, note that you can select **Detail** to display a list of the detail records that can relate to an ID, (e.g., Accomplishments, Relationships, Interests, and Alternate Names and Addresses). Some of the scroll records are view-only (i.e., you cannot enter information); however, many of the records enable you to enter additional information about the person or entity.

CAUTION: You must select **Finished** twice (once in the detail window, and again in the entry screen) to save a detail record. The system saves detail records temporarily until you select **Finished** in the entry screen. If you do not select **Finished** in the entry screen, the system does not save the detail records.

Updating an ID Record

How to Update a Record On an Entry Screen

You can use the previous procedure to update an existing record. During your query, select the record, then select **Update**, making changes as required. Select **Finished** when you have completed your changes.

Helpful Hints to Completing Fields

The following are some additional guidelines to help you enter information in fields:

- When the data you type in a field completely fills the space allowed, the cursor often automatically moves to the next entry field; you do not need to advance the cursor yourself.
- If the data you type in a field does not completely fill the field, advance the cursor to the next entry field in one of the following ways:
 - For the GUI format, press **<Tab>** or click the mouse
 - For the character-based format, press **<Enter>**
- For fields that require all uppercase letters, the system automatically capitalizes such letters. You do not need to use the **<Shift>** key to capitalize them.

Standards for Updating Name and Address Information

Introduction

You must observe certain standards when adding and updating name and address information in the ID record. The following sections explain standards for adding and updating name and address information in the system. For more information on the procedure for entering data and creating the ID record see *Adding an ID Record* in this guide.

Standards for Adding Names

You enter the proper name of the person in the Name field in the ID record. The system requires you to use certain rules when entering the name information in order to get proper output.

Note: You may need to consult your Jenzabar system coordinator for help in entering name and address information.

Enter the name in the following order:

1. Last Name
2. Comma
3. Space
4. First Name
5. Space
6. Middle Initial (or middle name)
7. period

Example: Smith, John C.

Note: You may also enter titles and suffixes, if they apply, in the Title and Suffix fields. Examples of titles are Dr., Mrs., Mr. etc. Examples of suffixes are M.D, Ph.D, etc.

Additional Standards

Additional standards may apply for unique situations such as spaces in proper names and the entering of company names. Below are explanations of standards for these situations.

Spaces in Names

Last names containing a space may keep that space; however, first names may not. If you enter a space between two first names, the second first name will not appear.

Example: Mc Garvin, MaryJane

Company Names

When entering company names:

- Place any articles after the company name and a comma (e.g., Coffee Shop, The).
- Place a space between a company name and a suffix, do not enter a comma after the company name (e.g., Rubbermaid Inc.).

Nicknames

If the individual uses a nickname, enter that nickname in a subordinate file called the other name file. This is also called the Addree record. Enter the nickname only (e.g., Jim, Tim); do not also enter the first or last name. For more information on the Addree record, see *CX System Reference Technical Manual*.

Maiden/Other Names

In certain instances individuals may change their names to something different than what it was while they attended your institution; for example, if they marry. In such cases enter the new name in the ID record in the format described above. The previous name will be stored in the addree record (assuming this functionality was turned on during your set up).

Suffixes

If you use a suffix, the name must be in Last, First, M., Jr. format. The extra comma separating John Doe's middle initial and "Jr." is a flag the system uses. When your institution sends a letter, the system transposes "Doe, John J., Jr." and uses the salutation, "Dear Dr. John J. Doe, Jr."

Social Security Number

If a social security number should change, you enter the new number on an ID Entry screen. The previous number is stored in the addree record (assuming this functionality was turned on during your set up).

Alternate Names and Social Security Numbers

You may maintain multiple names and social security numbers for an individual. The Other Name Detail window display these names and numbers. You can use this screen to maintain any previous names, formal names, informal names, etc., that you want to use. For additional information, see the Other Name Detail window in the *Using Common Screens* section in this guide.

Note: Normally, alternate names and social security numbers are automatically maintained by the system when a change is made.

Standards for Adding Addresses

The ID record also contains two lines for adding an individual's address. Each address line contains 24 characters in which to enter information. This is considered the individual's permanent address and is used for labels and all correspondence requiring an address. Following are rules for entering information for different elements of an address.

Abbreviations

Use standard abbreviations for streets and directions (e.g. Ave., St., and N, S, E, W, SE, NW). Additional miscellaneous abbreviations are RR for rural route and Box for Box number.

City

The city field is a required field and must be entered in the available 24 character space.

State

Enter the conventional state code into the state field (e.g., OH, PA, VA). For foreign addresses enter the code "--".

Note: The state table includes codes for Canadian Provinces and Mexico.

Zip Codes

The zip code field is a required field. If the address is from a foreign country enter blank spaces in the field. Also, if you know the four digit extension enter all ten digits with the dash (e.g., 19508-8764).

Country

You must enter a country code that is in your institution's country table. When you enter the code, it will be displayed to allow you to check for typing errors.

Telephone

United States phone numbers must include the area code and the dashes (e.g., 555-555-1234). Do not use parentheses around the area code.

Alternate Addresses

You may maintain multiple addresses on the system. In many cases you may need to use this feature to store alternate addresses such as summer addresses of students, addresses for students living in non-college housing, vendor remittance addresses or previous permanent addresses.

When a new address is added, it will be the Permanent address. Add the previous address to the alternate address file. You may configure your system to automatically save and add the previous address.

Military Addresses

In the system, you may also store military addresses with unconventional city and state codes. Below is information for a military student followed by an example of how to enter the information in the address fields.

Student Information	Field Entry
Jane K. Student	Name: Jane K. Student
PFC 813 Box 155	Address: PFC 813 Box 155
SPO AE	City: SPO
09620-0155	State: AE
	Zip: 09620-0155

Soundex as a Tool in ID Lookup

Soundex is a program (*sndxinit*) that places a four-character code in the ID record and Alternate Name/Address record. The code is based on an algorithm that groups similar sounding names under a unique four-character code. For example, the names "Noble" and "Neuville" both have the same soundex code, N140. When you perform a query for "Noble" and indicate you want to conduct a phonetic search, the system will retrieve both names because of the soundex match.

When you perform soundex searches as well as searches on alternate names, the list of retrieved IDs will feature one of the following Match codes:

Note: Examples are designed to emphasize the meanings of the codes and do not reflect correct name formatting for ID queries.

A

A name found in the Alternate Name/Address record. For example, if you conducted a search for Joan Brown* and the alternate name Joan Brown was located for the current Mrs. Joan Smith, Joan Brown would appear in the retrieved ID list with a match code of A.

AP

A phonetic match found in the Alternate Name/Address record. For example, if you conducted a search for Joan Brown and the alternate name Jane Browne was located for the current Mrs. Jane Smith, Jane Browne would appear in the retrieved ID list with a match code of AP.

I

A name found in the ID record. For example, a search for John Smith would retrieve John Smith.

A

A name found in the Alternate Name/Address record. For example, if you conducted a search for Joan Brown and the alternate name Joan Brown was located, Joan Brown would appear in the retrieved ID list with a match code of A.

Running the Soundex Process

Soundex is typically scheduled to run as a *cron* job; that is, it runs automatically at some predetermined interval. For more information about processing using *cron*, see your UNIX operating system documentation.

Using Table Lookup

Introduction

The table lookup feature enables you to view and select values that exist in tables so you do not have to remember all valid codes or values for a particular field. For example, when you must enter the two-character postal code for a state, you can use table lookup to view a list of the valid codes that appear in your State table, and select the code you want for the ID record you are completing.

How to Use Table Lookup

Follows these steps to use Table Lookup.

1. Select **Table lookup** to display the Table Lookup window.

Note: To limit the number of values that appear in the character-based Table Lookup window, you can enter one or more of the characters in the field, and then select Table Lookup. The window only displays the values that begin with the character(s) you entered.

Example: In the State field, if you enter O and then select Table Lookup, the Table Lookup window that appears contains only the following information:

– OOOhioOOklahomaOOntarioOOregon

2. Are you using the GUI-based format?
 - If yes, go to step 3.
 - If no, go to step 4.
3. Is the code or value you want to use in the Table Lookup window?
 - If yes, click on the item you want, then select **OK**.
 - If no, click on the table lookup window scrolling arrows to display the code, click on the desired code, then select **OK**.
4. Is the code or value you want to use in the Table Lookup window?
 - If yes, enter the letter that corresponds to the value that you want.
 - If no, press **<Ctrl-f>** until the value you want appears in the window, then enter the letter that corresponds to the value.

Using the ID-Type Window

Introduction

When you locate a record for an individual, you may be unsure if the located record is the correct selection. For example, if you are querying an ID record for John Smith, your institution may have several records on the database under that name. The ID-Type window can help you determine whether the person is a student, a faculty member or an alum, etc.

Example

The following is an example of an ID-Type window in an entry program.

The screenshot shows a window titled "Admissions Entry - ID Form" with a menu bar (File, Edit, Commands, Help) and a toolbar. The main area displays the following information:

ID No 1253510 **SS No** 867-01-0918 **Add Date** 11/03/1994
Title MR Mr. **Last Update** 11/03/1994
Name Harrison, Addison Wesley **Telephone** 513-592-0194
Suffix
Address 5000 Main St
ID Type/Associated Records [X]

C	Alumni N	Admit N	Student Y
State	Business N	Undergraduate N	Currently Enrolled N
	Constituent N	Graduate N	Undergraduate N
	Donor N		Graduate N
	Instructor N	Institution N	Student Services Y
	Foundation N	High School N	Residence Hall N
	Organization N	College N	Mealplan N
	Parent N	Community	Financial Aid N
	Payroll N	College N	Currently on Aid N

Close []

Press any key to close the id-type window

Contents of the ID-Type Window

The ID-Type window is display-only. It contains a variety of descriptive words and phrases that can apply to an individual or an entity. The system automatically sets a Y or N flag next to each descriptive word or phrase, depending upon the records that exist for the entity.

The following list contains the descriptive words and phrases that appear on the ID-Type window, and the records or values that must be present for the corresponding flag to contain a Y. If the appropriate records or values are not present, the system sets the flag to N.

Admit

Contains Y if an Admissions record (adm_rec) for the ID exists in the system. The system creates an Admissions record when an individual applies for admission, and you enter information about the individual into Recruiting and Admissions entry screens.

Alumni

Contains Y if an Alumni record (alum_rec) for the ID exists in the system. The system creates an Alumni record in either of the following ways:

- When you use the Alumni Form in Constituent Entry to enter information about an individual
- When you use the Move Graduates to Alumni menu option on the Registrar: Session Processing menu

Business

Contains Y if a Business record (bus_rec) for the ID exists in the system. The system creates a Business record when you use the Business Form in Admissions Entry: Constituent Entry to enter information about an entity.

College

Contains Y if a School record (sch_rec) for the ID exists on the system, and if the Category field (ctgry) in the School record contains the value COL (for college). The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

Community College

Contains Y if a School record (sch_rec) for the ID exists on the system, and if the Category field (ctgry) in the School record contains the value JRC. The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

Constituent

A constituent is a supporter or affiliate of an institution who is interested in the advancement or promotion of the institution; a potential or current donor. This field contains Y if a Constituent Status record (consstat_rec) for the ID exists on the system. The system creates a Constituent Status record when you add constituent information in Constituent entry.

Currently Enrolled

Indicates whether the student is enrolled for the current session. Contains Y if a Student Academic record (stu_acad_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Session (sess) - the current academic session
- Year (yr) - the current academic year
- Registration Status (reg_stat) - either C or R

The system creates a Student Academic record when you use the Program Enrollment Form in Student Data Entry to add information about an admitted student.

Currently on Aid

Contains Y if a Student Financial Aid record (stufa_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Financial Aid Year (fa_yr) - the current financial aid year
- Packaging Status (pkg_stat) - neither N nor R
- Total Offer (tot_offer) - greater than 0

The system creates a Student Financial Aid record when you use the Financial Aid Entry program or the Financial Aid Need Analysis program to add data for a student for the first time in a financial aid year. You can add data in any of the following ways:

- Running the Need Analysis tape conversion process
- Running the ISARIN process in (EDE Electronic Data Exchange)
- Manually entering data

Donor

A donor is an individual, foundation, organization or institution that makes a gift to an institution. This field contains Y if a Donor record (donor_rec) for the ID exists on the system. The system creates a Donor record when you use the Donor Form in Constituent Entry to add information about a donor.

Financial Aid

Financial aid is a type of third-party source providing financial aid to a student for expenses related to a student's postsecondary education. This field contains Y if an Aid record (aid_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Status (stat) - neither N nor R
- Amount (amt) - greater than 0

The system creates an Aid record when you award aid to a student in any of the following ways:

- Through Automated Packaging
 - Interactively
 - In batch mode
- Manually

Foundation

A foundation is funds designated to provide perpetual support for an organization, or an institution supported in such a manner. This field contains Y if a Foundation record (fnd_rec) for the ID exists on the system. The system creates a Foundation record when you use the Foundation Form in Constituent Entry to add information about an entity.

Graduate (Admitted)

Contains Y if an Admissions record (adm_rec) for the ID exists on the system, and if the Program field (prog) in the Admissions record contains the value GRAD. The system creates an Admissions record when an individual applies for admission, and you enter information about the individual into Recruiting and Admissions entry screens.

Graduate (Student)

Contains Y if a Student Academic record (stu_acad_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Program (prog) - GRAD
- Session (sess) - the current academic session
- Year (yr) - the current academic year
- Registration Status (reg_stat) - either C or R

The system creates a Student Academic record when an individual registers for a session.

High School

Contains Y if a School record (sch_rec) for the ID exists on the system, and if the Category field (ctgry) in the School record contains the value HS. The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

Institution

Contains Y if a School record (sch_rec) for the ID exists on the system. The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

Instructor

Contains Y if a Faculty record (fac_rec) for the ID exists on the system. The system creates a Faculty record when you enter personnel information about an instructor.

Mealplan

Contains Y if a Student Services record (stu_serv_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Session (sess) - the current academic session
- Year (yr) - the current academic year
- Meal Plan Waived (meal_plan_wvd) - not Y

The system creates a Student Services record when you use either of the following two menu options on the Student Services menu:

- Add Student Service Record
- Update Student Service

Organization

Contains Y if an Organization record (org_rec) for the ID exists on the system. The system creates an Organization record when you use the Organizations Form in Constituent Entry to add information about an entity.

Parent

Contains Y if a Constituent Status record (consstat_rec) for the ID exists on the system, and if the Constituent Status field (consstat) in the Constituent Status record contains the value FPARENT. The system creates a Constituent Status record when you add constituent information in Constituent entry.

Payroll

Contains Y if a Personnel record (pers_rec) for the ID exists on the system. The system creates a Personnel record when you use the Personnel Entry process on the Payroll/Personnel: Data Entry menu.

Residence Hall

Contains Y if a Student Services record (stu_serv_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Session (sess) - the current academic session
- Year (yr) - the current academic year
- Building (bldg) - neither blank nor COMM

The system creates a Student Services record when you use either of the following two menu options on the Student Services menu:

- Add Student Service Record
- Update Student Service

Student

Contains Y if a Program Enrollment record (prog_enr_rec) for the ID exists on the system. The system creates a Program Enrollment record when you use the Program Enrollment Form in Student Data Entry.

Student Services

Contains Y if a Student Services record (stu_serv_rec) for the ID exists on the system. The system creates a Student Services record when you use either of the following two menu options on the Student Services menu:

- Add Student Service Record
- Update Student Service

Undergraduate (Admitted)

Contains Y if an Admissions record (adm_rec) for the ID exists on the system, and if the Program field (prog) in the Admissions record contains the value UNDG. The system creates an Admissions record when an individual applies for admission, and you enter information about the individual into Recruiting and Admissions entry screens.

Undergraduate (Student)

Contains Y if a Student Academic record (stu_acad_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Program (prog) - UNDG
- Session (sess) - the current academic session
- Year (yr) - the current academic year
- Registration Status (reg_stat) - either C or R

The system creates a Student Academic record when an individual registers for a session.

SECTION 10 - USING OTHER MENU FEATURES

Overview

Introduction

This section provides information and step-by-step procedures for you to follow when you do the following:

- Change your UNIX password
- Manage your printing of reports and letters

The system provides access to processes for these miscellaneous tasks on the Utilities [U] menu.

Note: Other miscellaneous processes also exist on the Utilities menu. The following lists the processes, and sources of information about the processes:

ADR Options

Using Communications Management, from Jenzabar

Letters/Labels/Reports

Using Communications Management, from Jenzabar

Run SQL

Informix SQL User Guide, from the IBM Corporation.

Subscriptions

Using Communications Management, from Jenzabar

Before You Begin

Before you begin to use the following procedures for these miscellaneous tasks, remember the following:

- Your password *must* remain confidential to protect your institution's security.
- You must know the name of the printer that you want to use.
- You must know the name of the forms that you use to print your reports and letters.

Menu Options to Use

- Select Login from the Utilities menu to change your password.
- Select Printer Control from the Utilities menu to manage your printing processes.

Changing Your Password

Introduction

Jenzabar recommends that, for security reasons, you change your password at least once every month or two. In addition, you must not write your password, or tell it to anyone.

When you enter your password at the appropriate prompt, UNIX does not display the characters that you enter. By not displaying your password, the system helps to preserve security.

Password Characteristics

Your password must meet the following minimum criteria:

- It must be at least six characters in length
- It must contain at least one numeric (or special) character
- It must contain at least two alphabetic characters

In addition, Jenzabar suggests the following guidelines as you select your password:

- Never use a name or initial of a family member or pet, or an important date.
- Do not use actual words as passwords, attaching a number to the beginning or the end of the word.
- Since you should never write your password, select a password that you can remember without difficulty. For example, a password that you can pronounce is easier to remember.
- The most secure passwords imbed numerics within alphabetic characters.

Good examples: rox18hab, bee92ar, ga8ttag

Poor examples: john42, 16rover, an010294, compute, sqd01yjw

Note: The operating system recognizes the difference between uppercase and lowercase letters, and special characters, (e.g., “, ‘, !, and *, which are also valid). You can mix upper-case letters and special characters with the other letters and numbers to create a more secure password.

How To Change Your Password

The following is a list of the steps to follow when you change your password.

1. From the Utilities: Login menu, select Change Password, then select Finish. The system displays the following prompt:

“Changing password for *username*

Old password:”

2. Enter the password that you want to change. The system displays the following prompt:

“New password:”

3. Enter your new password. The system displays the following prompt:

Re-enter new password:”

4. Enter your new password a second time to confirm that you typed it correctly. The system confirms that you changed your password.

Note: If you type your password incorrectly the second time, the system prompts you to enter your new password again.

Managing Your Printing Processes

Introduction

The system provides a variety of ways you can manage your printing processes. For example, you can ensure that, when you use special paper for a print job, no one else can use the printer. You can also view the status of your print jobs, and delete a job from the print queue if desired.

Printer Control Processes

The following lists and describes the printer control processes that you can access from the menu to manage your print jobs.

Note: All the processes described below appear on the Utilities: Printer Control menu.

Clear Form Type

Clears the specified form type from the printer's memory. After you eliminate the form type from the printer's memory, you can specify another form type using the Load Form Type menu option, or you can print jobs on standard paper.

Display Spooler Status

Displays information about the print jobs that await processing for the printer that you specify.

Idle Printer

Enables you to interrupt the print queue when the printer completes printing the current print file.

Note: When you stop the printer with this option, you must restart the printer to enable it to print again.

Load Form Type

Enables you to specify the name of the form type that you want to associate with the printer for the upcoming print job. The form type corresponds to the name of a particular type of printed paper (e.g., letterhead, paper type, transcript form, or check).

Print Any Jobs

Enables you to unlock the printer after you have reserved it for a single user, after you provide the name of the printer.

Print File

Enables you to print any file, after you provide the following information:

- Name of printer
- Number of copies
- Form type, if any
- Filename

Print Jobs for One User

Enables you to lock the printer for a single user, after you provide the following information:

- Name of printer
- User name

Remove Print File

Deletes a file from the print queue, preventing it from printing.

Slave Printer Options

If applicable, enables you to set the print characteristics for a slave printer that is dedicated to your computer. Using this option, you can send codes to your printer to change the way it prints.

Note: If you use a slave printer in your office and want to change the way it prints, contact your Jenzabar coordinator.

Start Printer

Restarts the printer after you have used the Idle Printer menu option, or after you have cleared the form type.

How To Use the Printer Control Processes

The following lists and describes how to use the printer control processes in this section.

When you want to print the contents of a standard file

Print File

When you want to print a file that requires a special form type

- Print Jobs for One User
- Idle Printer
- Load Form Type
- Start Printer

When you want to determine your print job's position in the printer's queue

Display Spooler Status

When you want to make the printer available to other users after printing a special job

- Clear Form Type
- Print Any Jobs
- Start Printer

When you change your mind about printing a file and want to remove it from the printer's queue

Remove Print File

When you want to use a slave printer

Slave Printer Options

Note: Contact your Jenzabar coordinator for information about using this option.

SECTION 11 - REQUESTING OPERATOR FORMS

Overview

Introduction

This section provides information and step-by-step procedures to follow when you:

- Produce a form for a current student
- View a current student's form request history

Before You Begin

Before you begin to use the following procedures for requesting operator forms, remember:

- An ID record for the student must already exist on your database
- A Program Enrollment record must exist for the student
- Use the field descriptions in the *Using Common Screens* section of this guide when you complete the fields on the screens discussed in this section
- A form generally includes a large amount of information (e.g., biographical) about one individual

Process

This list shows the general phases that take place before, during, and after requesting operator forms.

1. The student has been admitted to the institution.
2. The student has registered for courses.

Producing a Form for a Current Student

How to Produce a Form for a Current Student

Follow these steps to produce a form for a current student.

1. Select Registrar from the Student Management: Main menu.
2. Select Registration.
3. Select Operator Form Request. The Operator Form Request screen appears with the cursor in the Session field.
4. Do you know the Session code?
 - If yes, enter the Session code, and then press **<Tab>**
 - If no, select **<F6>** for Table Lookup, highlight the correct Session code, and then select **OK**

In both cases, the cursor moves to the Academic Year field.

5. Enter the instructional year (e.g., 1997). The cursor moves to the Program field.
6. Do you know the Program code?
 - If yes, enter the Program code. The cursor moves to the Session field.
 - If no, select **<F6>** for Table Lookup, highlight the correct Program code, and then select **OK**.
7. Select **Finish**. The Registrar: Registration menu appears, the word "Exist" appears next to the Tasks system option, and then the Operator Form Request - Operator Form Request screen appears with the cursor in the ID field.
8. Enter the identification number of the student, and then select **Done**. The Name, Address, City, and State/Zip fields display information for the individual whose identification number you entered.
9. Select Form Order. The cursor moves to the Form name field.
10. Enter the code for the desired form (e.g., SDSBATCH), and then press **<Tab>**. The cursor moves to the Alternate recipient? field.

Note: The form code you select must allow for an alternate recipient.

11. Is the form to go to an alternate recipient?
 - If yes, enter **Y**. The Alternate Recipient window opens with the cursor in the Alternate recipient ID field. Go to step 12.
 - If no, enter **N**. Go to step 16.
12. Enter the identification number of the alternate recipient, and then select **Finish**. The Operator Form Request - Operator Form Request screen appears.

Note: You can also send a form to an individual who has no ID number on the system if the contact is not set up to run in batch mode.
13. Select **Finish**. A message appears indicating that an order was placed for the type of form you selected.
14. Select **OK**. The message disappears.

15. Do you want to produce a form for another current student?
 - If yes, select **Query**, and then go to step 8.
 - If no, select **Exit**. A message appears asking “Are you sure you want to exit?” Go to step 18.
16. Select **Finish**. The word “Working” appears on the comment line at the bottom of the screen. It disappears after the form has printed.
17. Do you want to produce a form for another current student?
 - If yes, select **Query**, and then go to step 8.
 - If no, select **Exit**. A message appears asking “Are you sure you want to exit?” Go to step 18.
18. Do you want to exit?
 - If yes, select **Yes**. The Registrar: Registration menu appears.
 - If no, select **No**. The message asking “Are you sure you want to exit?” disappears.

Viewing a Current Student's Form Request History

How to View a Current Student's Form Request History

Follow these steps to view a current student's form request history.

1. Select Registrar from the Student Management: Main menu.
2. Select Registration.
3. Select Operator Form Request. The Operator Form Request screen appears with the cursor in the Session field.
4. Do you know the Session code?
 - If yes, enter the Session code, and then press **<Tab>**.
 - If no, select **<F6>** for Table Lookup, highlight the correct Session code, and then select **OK**.

In both cases, the cursor moves to the Academic Year field.

5. Enter the instructional year (e.g., 1997). The cursor moves to the Program field.
6. Do you know the Program code?
 - If yes, enter the Program code. The cursor moves to the Session field.
 - If no, select **<F6>** for Table Lookup, highlight the correct Program code, and then select **OK**.
7. Select **Finish**. The Registrar: Registration menu appears, the word "Exist" appears next to the Tasks system option, and then the Operator Form Request - Operator Form Request screen appears with the cursor in the ID field.
8. Do you know the identification number or social security number of the student whose form request history you want to view?
 - If yes, enter the identification number or social security number in the ID field, and select **Done**. The student data appears.
 - If no, select **Lookup ID** to perform a query by student name. Then enter the identification number or social security number in the ID field of the Operator Form Request - Operator Form Request screen, and select **Done**. The student data appears.
9. Select **History**. The cursor appears in the Form name? field.
10. Enter the code for the desired form, or select **<F6>** for Table Lookup.
11. Select **OK**. One of the following occurs:
 - A message appears stating there is no record of previous requests for a form of the type you specified
Example: There is no record of previous requests for a form of type 'UFLBATCH' for student ID: XXXXXXXX.
 - The student's form request history appears
12. Do you want to view another current student's form request history?
 - If yes, select **Query**, and then go to step 8
 - If no, select **Exit**

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