SONISWEB®

Scholastic ONline Information System for the Web

Applicant Checklists, Activities, and Dispositions

Applicants have unique records and processes related to their applications. Applicants select a program which results in transcripts, references, and other items they must furnish. As items are received, they are marked as complete in the applicant's checklist and activities records. Appraisal committees then decide on accepting, rejecting, or wait-listing the applicant. This is called disposition. Your staff updates this record for each applicant. Your applicants can log on to your Web site and check their checklists and dispositions.

This text describes the records unique to applicants with emphasis on checklists and the processes in keeping those records. This text starts with **navigating** the functions on page 4; the most frequently used functions are at the front, starting on page 8. A summary and the introduction start on page 58. To see the **changes** in this edition look on page 3.

March 2006

RJM Systems, Inc.

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(ApplicantChecklistsDisposition.doc - 2/27/2006 4:03:00 PM)

NEW IN THIS EDITION

- This edition is for SONISWEB® version 2.0. A few of these changes were also added to version 1.4.
- Figure 1 Toolbar for those with User-ID access, Figure 2 Function Lists1 - Partial, page 5, Figure 79 Login Displays and Figure 80 Typical SONISWEB® Page, page 63.
- Most of the reports have been rewritten in the Cold Fusion™ Report Builder. Those have "(RB)" following their names as seen in Figure 2. The older Crystal Reports™-Enterprise reports (without the "RB") are still available in most cases.
- Figure 12 Online Application Data Collected on page 11.
- Figure 15 Generate Record Status, page 13.
- Figure 22 PIN and SSN, page 18.
- Figure 25 Checklist, page 20.
- "Education and Reference Records", page 22.
- "ACT-SAT Test Records", page 25 .

- Figure 36 Applicant's Status Display on page 29.
- New reports and changes in existing reports, see page 30 to 35.

• Figure 1 Toolbar[1] for those with User-ID access

NAVIGATING THE FUNCTIONS

Administrative users have User-IDs and Passwords and see an initial display like Figure 1. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

[1] You only see what you're authorized to see by your Profile and individual Limits and Privileges, so your choices may be fewer than these. Reports with "(RB)" in the name use the newer Cold Fusion™ Report Builder. Those without use Crystal Reports™-Enterprise.

The access rights of an administrative user is defined by:

1. The **Profile** selected when you were issued a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. <u>One</u> profile covers all the people in each staff category.
2. The <u>individual</u> **limits** specified for you when you were issued a User-ID and Password. Typical limits are preventing access to faculty and staff personal records.
3. The **privileges** added for you when you were issued a User-ID and Password. The right to "Make Grades Official" or "View and Change PINs" are examples.

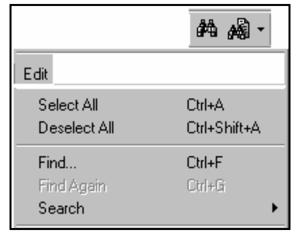
In Figure 1 click **Names** and select a name (page 53) to get the list on the left of Figure 2. Click **Reports** in Figure 1 to get the list on the top right, click **Systems** to get the selections on the bottom right in Figure 2.

• Figure 2 Function Lists[1] - Partial

WHAT DO YOU WANT TO DO?

Checklists and Dispositions include lots of automation. For a brief introduction, see the SONISWEB® manual "Overview of the Recruiting and Admissions Options". To see more detail on the setup of these automated processes, see "Applicant Records and Processes" on page 58.

- If you don't see what you need above, check the table of contents on page 2. You can also use the Adobe® find or search functions illustrated in Figure 3. It allows a Google®-like search[2] by word or phase.



• Figure 3 Adobe® Find and Search

Diagnosing and Fixing Problems

See the text "Messages, Errors, and Diagnosis".

Setting Your Browser for Proper Function and Security

Internet Explorer[3] (IE), Firefox™, Netscape®, and Opera Web browsers have an "auto-complete" or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text "Browser Settings" to set your browser for security, good performance, and to prevent your getting old data.

[2] If you're unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text "Index to Texts".

[3] Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

Receiving an Application

Prospective student can either:

- Enter an online application described below or
- Send a paper application that you enter on page 18.

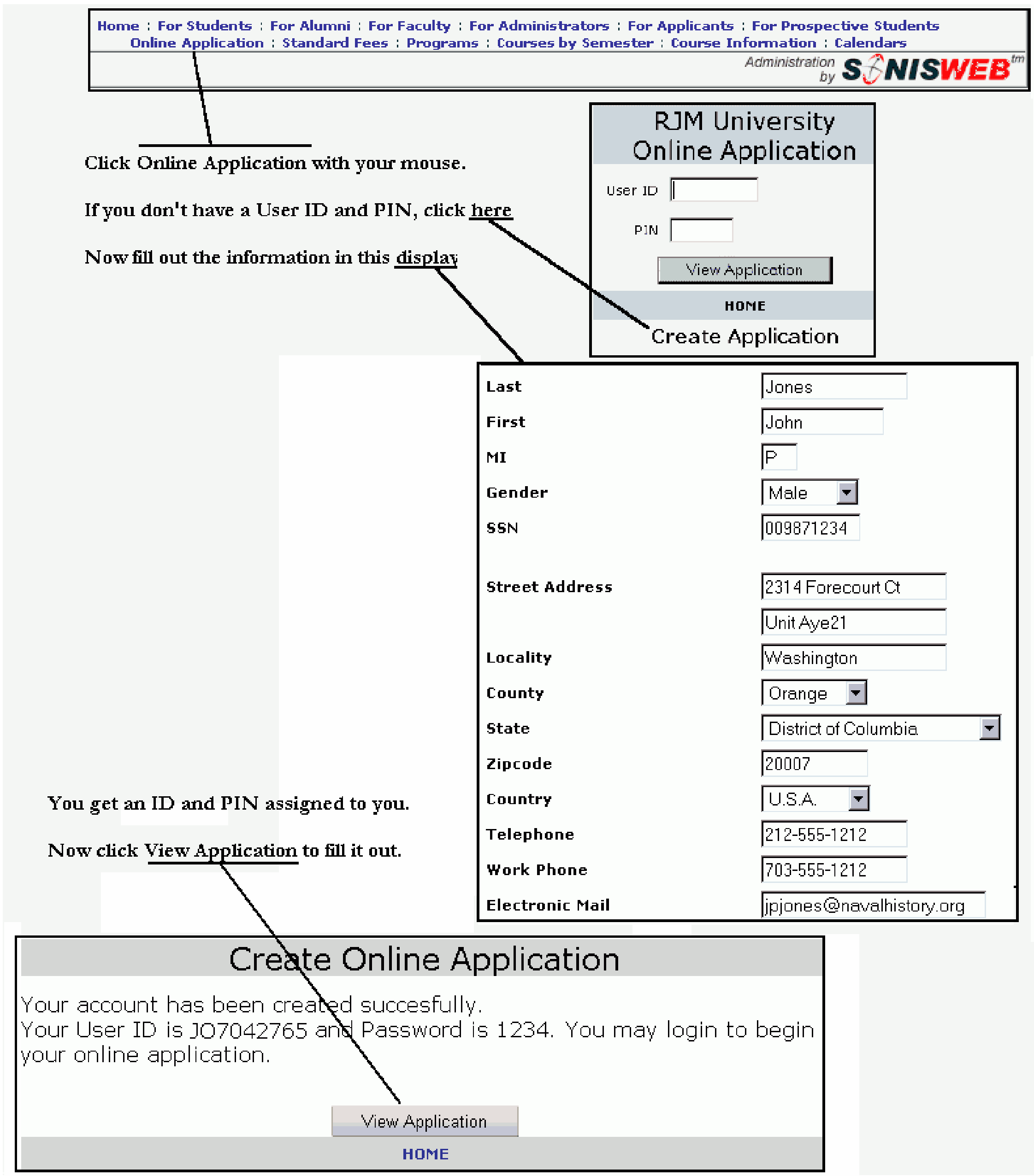
The Online Application

The online application is convenient for both you and the applicant. Many of the records that you need are partly filled in by the applicant over the Web. Each applicant is issued an ID and chooses a PIN[4], so he or she has ready access to your system, However, you still have to complete these records:

- The Online Application generates both an Application Checklist and Application Fees.
- You may need to add special **Checklist** items as described on page 20.
- Check and possibly correct the **Education** records. Using the on-line application, the prospective student may not select the proper institution or provide other information you need.
- Depending on your institution's requirements, you may need to enter more information in the **Biographic** record.
- Check the **Tests** records to be certain that the applicant filled in the SAT and ACT scores correctly.

[4] PIN = Personal Identification Number

Instructions for Entering an Online Application



• Figure 4 Online Application Process

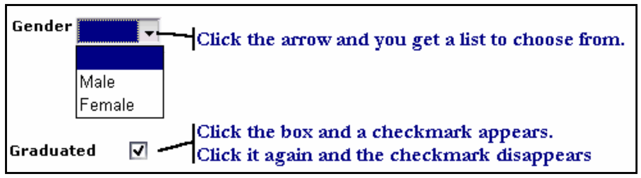
Follow the steps in Figure 5 to get an ID and PIN assigned so you can fill out the application. You'll need it to view or change it later.

Write down your newly-issued ID and PIN. You'll need them to access your application.

Filling Out the Application

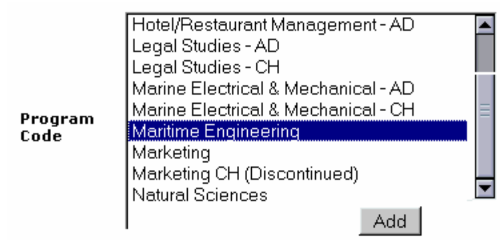
Figure 6 shows the two special types of fields you use in filling out the application.

In the menu list, you pick one. It can be the "blank" one at the top if you don't see a choice that fits.



• Figure 6 Pulldown-Arrow Menus and Checkboxes

When you see an **Add** button in a display like Figure 7, pick from the list or enter the requested information, then click the **Add** button. You keep adding until you have all you need, then click the **Next** button.



• Figure 7 Adding and Removing Entries

Clicking the **Next** button in Figure 8 takes you to the next section of the application. But, if you want to go directly to a section, click the arrow and pick the section from the menu.

Use the **Reset** button to clear what you just entered so you can start over.

• Figure 8 · Navigation from Section to Section

Note the guidance and instructions at the top of some displays. Figure 9 is an example.

• Figure 9 Instructions and Guidance

Viewing and Changing an Online Application

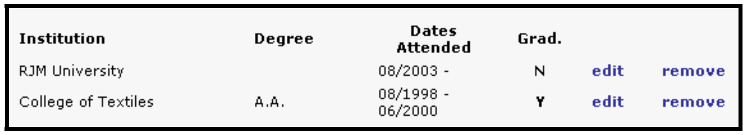
After you've filled out your application you can view it again and make changes to it. Since you have an ID and PIN, enter them in Figure 10 and then click the **View** button.

Use the choices shown in Figure 8 to get to the section you want to see or change.

You'll see what you've already entered as illustrated in Figure 7.

• Figure 10 Login to View or Change Online Application

In Figure 11 notice that you can delete an entry by placing your mouse pointer over **remove** until it changes color and then clicking the mouse button. To see what you originally entered and change it click **edit**. Click the **Add** button (see Figure 7) to add a new item.



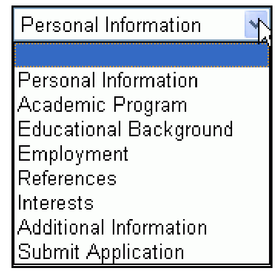
Institution	Degree	Dates Attended	Grad.		
RJM University		08/2003 -	N	edit	remove
College of Textiles	A.A.	08/1998 - 06/2000	Y	edit	remove

• Figure 11 Online Application Edit and Remove

Online Application Data Collected

Figure 12 shows the data applicants can supply when they enter their online applications. The relationship to the records shown in Figure 2 are:

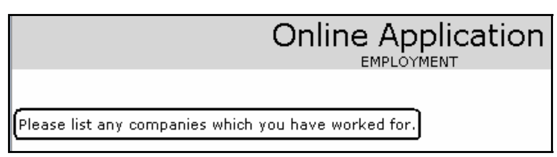
- Personal Information in Figure 12 is Biographic and Address in Figure 2.
- Academic Program in Figure 12 is Application and Education in Figure 2.
- Educational Background in Figure 12 is Education in Figure 2.
- Employment is the name in both Figure 12 and Figure 2.
- References in Figure 12 is References in Figure 2.
- Interests Figure 12 is Interests in Figure 2.
- Additional Information in Figure 12 is Essay Memo in Figure 2.
- Submit Application is where the applicant – when finished with all changes – submits it to your institution.
- Entering an online application creates the "Core" Activities and Checklist items in Figure 2.
- Picking an Academic Program in Figure 12 creates program-specific Activities and Checklist items in Figure 2.



• Figure 12 Online Application Data Collected

Online applicants are not forced to fill in every item, so the records are likely to be partially filled in. Your staff needs to review them and complete the information.

An authorized SONISWEB® user can change the guidance notes like that circled in Figure 13. Instructions for changing the notes are in the "Administration" manual.



• Figure 13 Online Application Notes

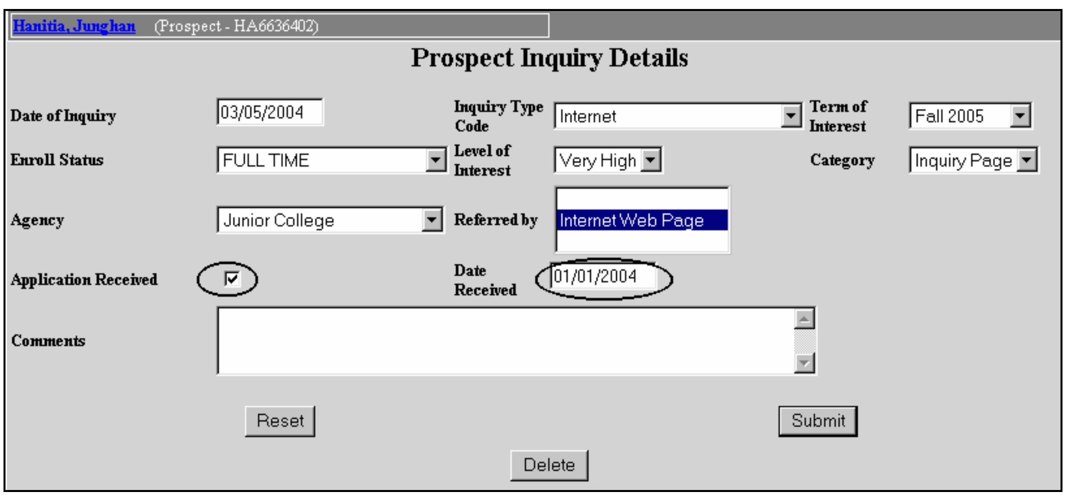
Entering a Paper Application

You can enter the application record anytime. The guidance starts on page 18. That doesn't make the person an applicant. You have two ways to make the prospective student an applicant:

- If your institution has set the Web Option of "Generate Record Status" (see page 13) you add[5] the Applicant status using the Prospect Inquiry Detail below.
- Add[5] a new status of Applicant. as "Changing or Adding the Status of Student for an Applicant " on page 53 for guidance.

> Those sending an Online Application (see page 8) will not appear as prospective students and will not have a Prospect Inquiry Detail record, so these steps are unnecessary.

1. Select **Names** from Figure 1. You get Figure 68.
2. Enter as much as you know of the person's name or ID in Figure 68, choose Prospect from "Record Status", then click the Search button.
3. All persons with that name or ID will be presented in a list. In the list, click the radio button[6] beside the name of the person you are updating, then click the View button. You get a record for that person and a function list on the left like Figure 2.
4. Click <u>Prospect Inquiry Detail</u> in Figure 2. You get Figure 14.



• Figure 14 Prospect Inquiry Details

5. In Figure 14, click the checkbox to show the application has been received. Today's date is automatically entered but you can type over it to enter a different date.
6. Click the Submit button.

[5] Normally you add a status, you don't replace one. By adding a status of Applicant (AP) while leaving the Prospective Student (PS) status in place, you preserve all the prospective student records for future recruiting studies.

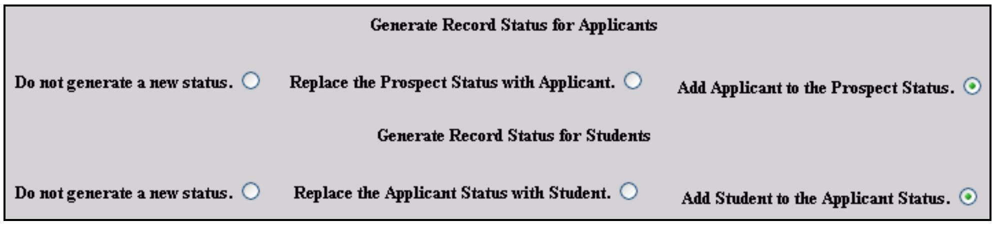
[6] See Figure 81 for guidance on using these buttons.

SONISWEB® takes one of these actions:

If "Generate Record Status" for Applicants is checked on (Figure 15) the prospective student has Applicant (a code of AP) added to his or her status.

Where "Generate Record Status" for Applicants is checked off (blank), the person's eligibility is shown in the pulldown menu in Figure 66.

Generate Record Status



• Figure 15 Generate Record Status

These options automate the adding of a status for a person. If Add radio buttons are selected, when a prospective student's (prospect's) application is received (Figure 14), the person automatically has AP (applicant) added to his or her status. When "Student?" is marked (Figure 24) and the person is admitted as a student, ST (student) status is added. This is set in the **Systems** Web Options function of SONISWEB®. The details are in the "Web Options Settings" manual.

With the "Do not generate…" and "Replace…" options selected in Figure 15, you add or change a status as described in "Changing or Adding a Status of Applicant for a Prospect" on page 51 and "Changing or Adding the Status of Student for an Applicant" on page 53.

ADDING A NEW APPLICANT STATUS OR A NEW APPLICANT

Adding a Person versus Adding a Status

- A Status is the role a person has at your institution: AP for applicant, OA for online applicant, PS for prospective student, ST for student, FA for faculty, etc. It's common for a person to have more than one status. You can add a status for an existing person. There's still just one person and one set of records for that person.
- A person has at least one status and a set of records associated with him or her.

Adding a New Status of Applicant

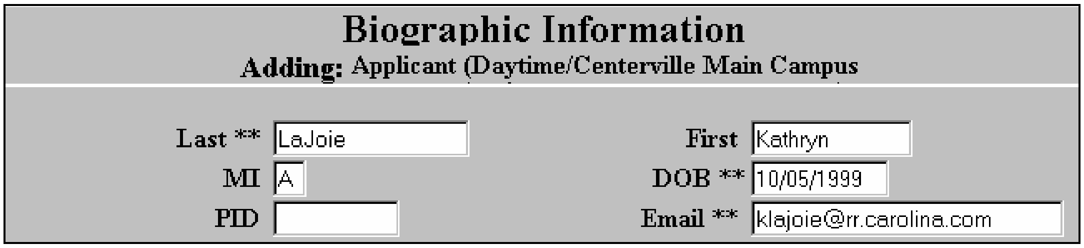
If the Web Option is set to "Generate Record Status" (see page 13), putting a checkmark in the "Application Received" checkbox in Figure 14 adds the status of Applicant (code of AP) to the student's record. Otherwise you add or a change the status as described in "Changing or Adding a Status of Applicant for a Prospect" on page 51.

Adding a New Applicant

Caution: You should not add a new applicant record if that person is already in your database as a prospect, student, or online applicant, etc.. Adding an applicant when the person already exists in your database results in lots of duplicate records and creates a mess you'll eventually have to clean up. To fix a duplicate problem, see the SONISWEB® manual "Student, Faculty, Applicant, and Alumni/ae Record-keeping".

To find out if there is any record for this person, enter as much as you know of their name in Figure 68, then click the Search button. If you include all of the choices in "Record Status", "Division", and "Campus", all persons with that name will be presented in a list. If you find the person in your records, go to "Entering a Paper Application" (page 12) to add the new Applicant status.

1. Select **Names** from the top list (Figure 1). You get Figure 68.
2. In the category boxes near the bottom of the display click Applicant, click the division the person is applying to and the campus or location you expect the applicant to attend. Only one item in each "user type" will be selected. If you do not select one item each, you receive an error message as illustrated in Figure 65 (page 51).



• Figure 16 New User Information

3. To add a new person, click the Add Name/Record Status button. You see a display like Figure 16 but with all the fields blank.

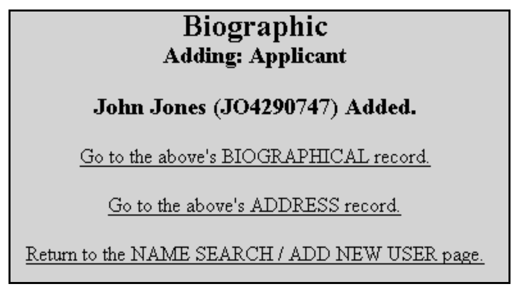
4. Enter the information in the fields. The fields with ** (asterisks) beside them are required.

   You can assign the applicant an ID (PID[7]) at this point. It is nine characters and can be a mixture of digits and letters. If you don't enter an ID, the system generates a unique nine character ID number consisting of the first two characters of the last name followed by seven random digits.

5. Once you have entered all the information, click the Submit button to record your entries. Nothing is recorded until you press the Submit button. Use the Reset button if you want to clear the display and start over.

6. Next you see Figure 17. Click Go to the above's BIOGRAPHIC Record. You see a mostly-empty biographic record that you can fill in.

7. Move to "Filling in the Application and Creating a Checklist" on page 18.



• Figure 17 Add Applicant Confirmation

[7] PID = Personal Identification Number, entered or generated when the person's record is first entered in SONISWEB®. PID and ID are used interchangeably.

USING ON-LINE CATALOG AND PROGRAMS ACCESS

Because anyone accessing your Web site can check the on-line catalog, discussing the programs and courses with potential students is simplified.

• Figure 18 Initial SONISWEB® Display

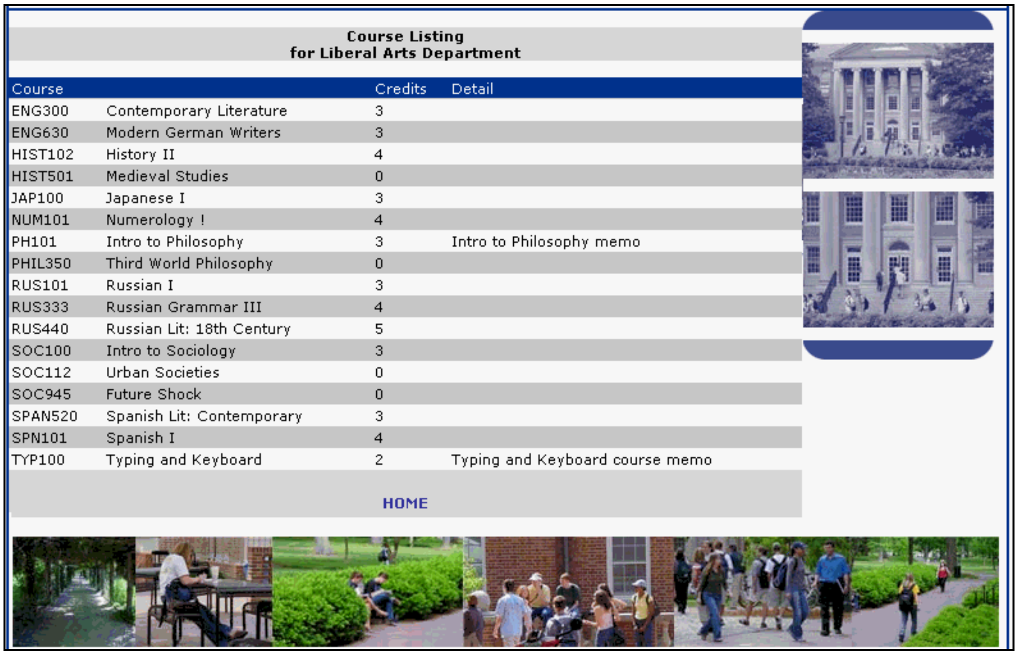
Clicking one of the choices in Figure 18 yields a display like Figure 21. (Each display is slightly different.)

When you choose Course Information, you are prompted to pick the department from a pulldown list as shown in Figure 19.

Where you choose Courses by Semester, you get a prompt to pick the School Year and Semester (Term) as shown in Figure 20.

• Figure 19 Department Selection

• Figure 20 Semester (Course Section) Choice



Course Listing
for Liberal Arts Department

Course		Credits	Detail
ENG300	Contemporary Literature	3	
ENG630	Modern German Writers	3	
HIST102	History II	4	
HIST501	Medieval Studies	0	
JAP100	Japanese I	3	
NUM101	Numerology !	4	
PH101	Intro to Philosophy	3	Intro to Philosophy memo
PHIL350	Third World Philosophy	0	
RUS101	Russian I	3	
RUS333	Russian Grammar III	4	
RUS440	Russian Lit: 18th Century	5	
SOC100	Intro to Sociology	3	
SOC112	Urban Societies	0	
SOC945	Future Shock	0	
SPAN520	Spanish Lit: Contemporary	3	
SPN101	Spanish I	4	
TYP100	Typing and Keyboard	2	Typing and Keyboard course memo

HOME

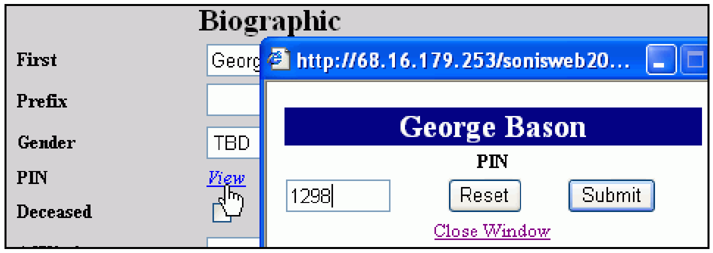
• Figure 21 On-line Course Listing

The person viewing the alphabetical list of courses, sections, or programs can scroll down to see them all. What is shown depends on:

- What was entered in the programs table or the course sections established for the selected semester.
- What programs, courses, and sections are enabled or active. If a program has been marked as disabled, a section has been cancelled or deleted, or a course has been marked inactive, they do not appear in the lists.

Programs, courses, and sections are set up, enabled or disabled, made active or inactive by the Registrar and/or the SONISWEB® administrator.

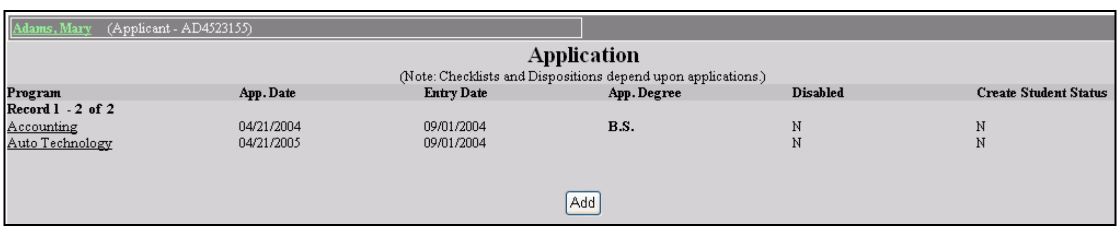
FILLING IN THE APPLICATION AND CREATING A CHECKLIST AND AN ACTIVITIES LIST



• Figure 22 PIN and SSN

1. In the Biographic record (click Biographic in Figure 2), enter a PIN[8] for the applicant so she or he can log onto your Web site and check the status of his or her application. (The portion of the biographic record containing the PIN field is shown above.) Call or send a note to the applicant informing her or him of your assigned PIN[8] and PID[7] number.

There's a quicker way to assign PINs to lots of people. Clicking **Systems** PIN Number lets you assign them to all "w/o" (without) in a status group. See the "User Authorization & Profiles" manuals for guidance.

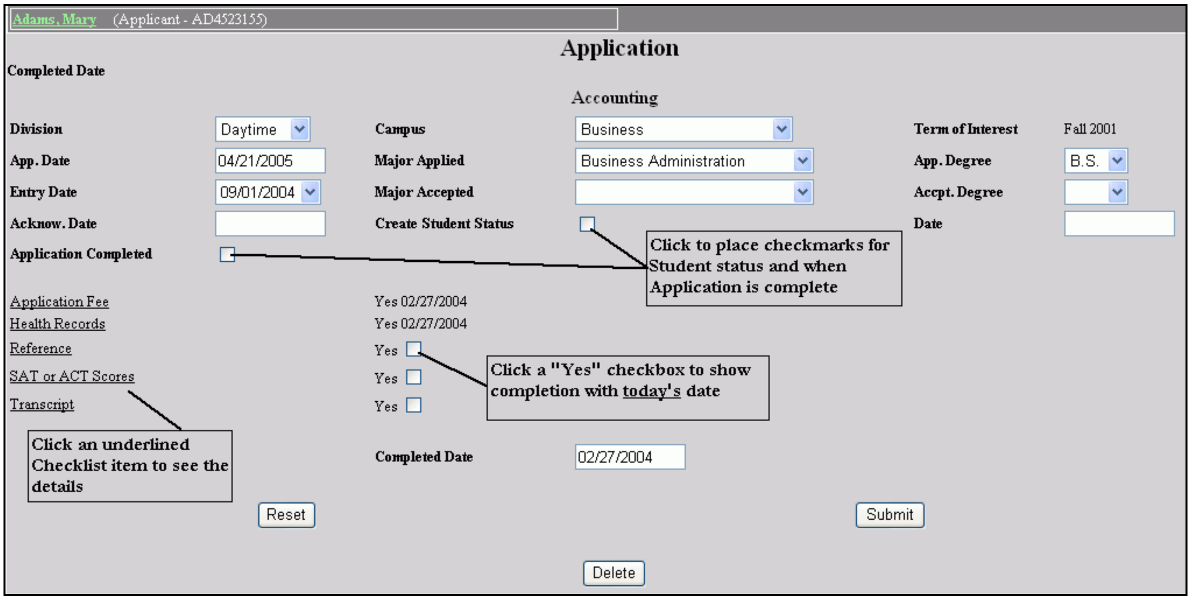


• Figure 23 Application List[9]

2. In Figure 2, click Application. You get Figure 23.
3. For a new applicant, Figure 23 will contain only the Add button. Click it.

[8] As noted in "Applicant Access to Checklists and Disposition" (page 29), applicants cannot change their records.

[9] Note in Figure 23 that a person can be an Applicant for one program and a Student in another.



• Figure 24 Application Form

4. Figure 24 documents the program(s) being applied for and creates a Checklist and adds Activities. Use the pulldown[6] arrows to select the program and other information on this applicant, then click the Submit button

   When you click the Submit button, SONISWEB® takes these actions:

   - If the "Core" checklist and the activities list have not been built for this person, they are built.
   - The checklist items and activities unique to this program are added.
   - If you set up application fees on page 37, they are automatically applied.
   - You get a message in red at the bottom of the display confirming the program has been added.

Entering an Application Payment

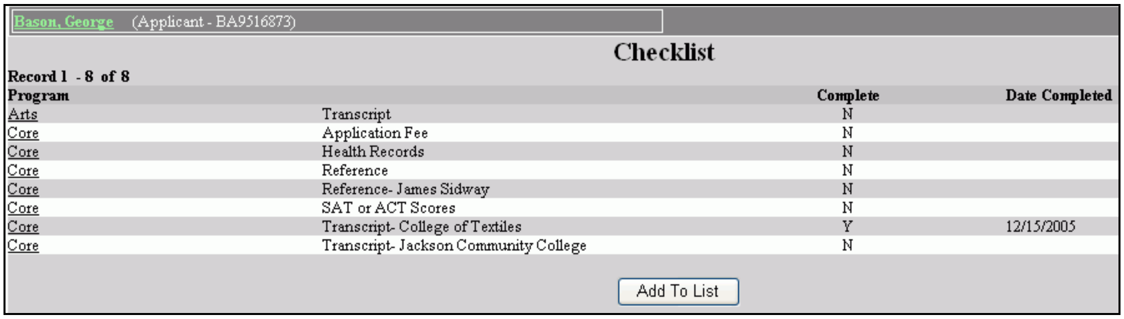
If you receive an application payment with the application, your institution may expect you to send it on the a cashier for entry. Normally posting payments is restricted to the cashier and certain financial officers. See the SONISWEB® text "Financial Record-keeping and Billing" for information on entering a payment.

"Admitting the Applicant as a Student" on page 28 shows how the Student checkbox in Figure 23 is used.

Checklists is what the applicant needs to do. Activities are what you staff needs to do. See "Figure 76 Activities and Checklists Defined" on page 58 to see how they relate.

Optional Additions to the Checklist

Make sure you want this task to be a checklist item and not an activity. See “Terms” on page 58 for an explanation of the difference between a checklist item and an activity. You add optional items to the applicant’s check list by clicking the Checklist function in Figure 2.



Bason, George (Applicant - BA9516873)

Checklist

Record 1 - 8 of 8

Program		Complete	Date Completed
Arts	Transcript	N	
Core	Application Fee	N	
Core	Health Records	N	
Core	Reference	N	
Core	Reference- James Sidway	N	
Core	SAT or ACT Scores	N	
Core	Transcript- College of Textiles	Y	12/15/2005
Core	Transcript- Jackson Community College	N	

Add To List

• Figure 25 Checklist

Click the Add button in Figure 25. You see a list of valid checklist items you can add. For example, a Visa or residency card is only required for non-citizens, so it is not a standard “Core” item. For foreign applicants you can add it in this process.

The list of checklist items is defined in “Creating and Changing Checklist Items” on page 39.

Activity lists are covered in “Setting up Applicant Activities and Disposition Activities” on page 43.

UPDATING CHECKLIST ITEMS

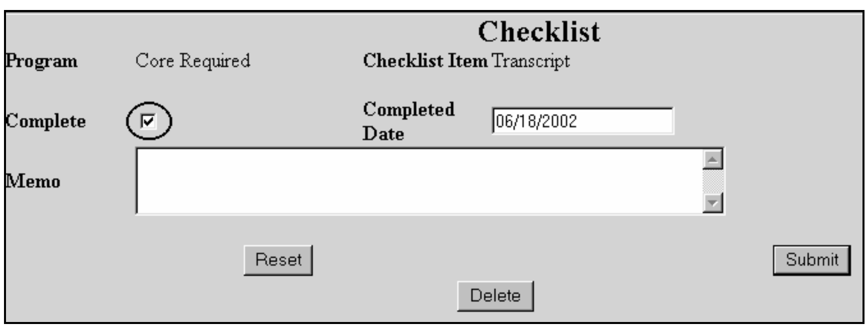
Some checklist items – usually transcripts – take you to the record so you can update it. See "Updating Checklists for Transcripts, References, and ACT-SAT Tests" on page 22 for those items.

For other items in the checklist you click the appropriate record for the student and update the record.

If using today's date for completion is acceptable, there's a quick check-off available in the Application record. See the checkboxes in Figure 24 on page 19.

You can also add new items as needed as described in "Optional Additions to the Checklist" (page 20).

1. Select **Names** from Figure 1. You get Figure 68.
2. Enter as much as you know of the applicant's name or ID in Figure 68, click Applicant in the category boxes near the bottom, then click the Search button.
3. You get a list of one or more applicants that fit your search criteria. In the list, click the radio button[6] beside the name of the person you are updating, then click the View button. You get a record for that person and a function list on the left like Figure 2.
4. Click the Checklist function in Figure 2. You get the checklist shown in Figure 25,
5. Click the underlined name of the item you want to update. That yields Figure 26.



• Figure 26 Checklist for an Applicant

6. To show completion, click the Complete checkbox in Figure 26 until there is a checkmark in it. Today's date is automatically entered for the Completed Date. You can type over the date to change it.
7. Click the Submit button. When you next see it in Figure 25, the Complete column will have Y (for yes) in it with any date you entered.

UPDATING CHECKLISTS FOR TRANSCRIPTS, REFERENCES, AND ACT-SAT TESTS

Education and Reference Records

Education and Reference records (see the Records function list in Figure 2) are added in these ways:

- An Online applicant enters the information directly, see page 8.
- A staff member adds it and specifies that it's also to be a checklist item with the school or reference name shown in the checklist using the optional button shown in Figure 27. Figure 25 shows Transcript checklist items with institution names created by this process. References are added in the same way with the name of the person referenced showing in the checklist.

• Figure 27 Add with Checklist

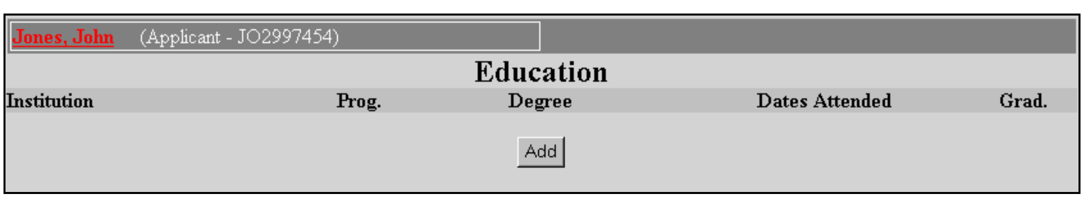
- It's added when a transcript or reference arrives as described below.

> Figure 25 shows specific items added with Figure 27 and nonspecific items that usually come from the recruiting plan.

When you add or update the records for the references or educational background, including a transcript, SONISWEB® inquires whether or not you want to update the checklist.

These are the steps.

1. Select **Names** from Figure 1. You get Figure 68.
2. Enter as much as you know of the applicant's name or ID in Figure 68, click Applicant in the category boxes near the bottom, then click the Search button.
3. You get a list of one or more applicants that fit your search criteria. In the list, click the radio button[6] beside the name of the person you are updating, then click the View button. You get a record for that person and a function list on the left like Figure 2.
4. Click the Education function for transcripts or References for those in Figure 2. That yields Figure 28.



• Figure 28 Add an Education Transcript[10]

5. Click the Add button in Figure 28. You see Figure 29.

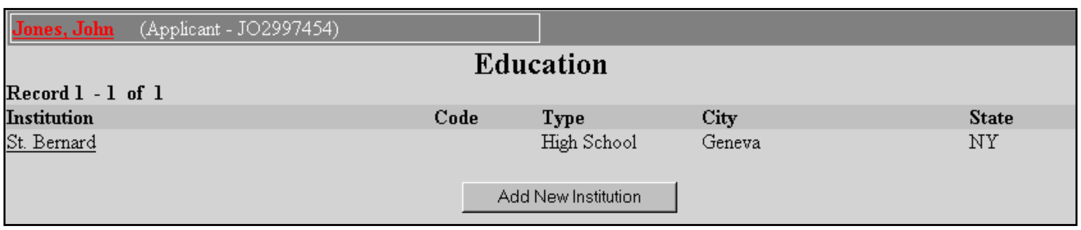
[10] Education and Reference records are nearly identical in how they work with checklists.

6. For transcripts (but not references), in Figure 29 enter as much as you know of the name of the institution that sent the transcript.

   To minimize duplicate institution records in your database, search for the institution carefully to make sure it is not present with a slightly different spelling. Once you are certain that it is not present, click the Add button. Adding an institution is straightforward. If you need to know more, see the text "Students, Faculty, Applicant and Alumni/ae Record-keeping" for more information on that function.

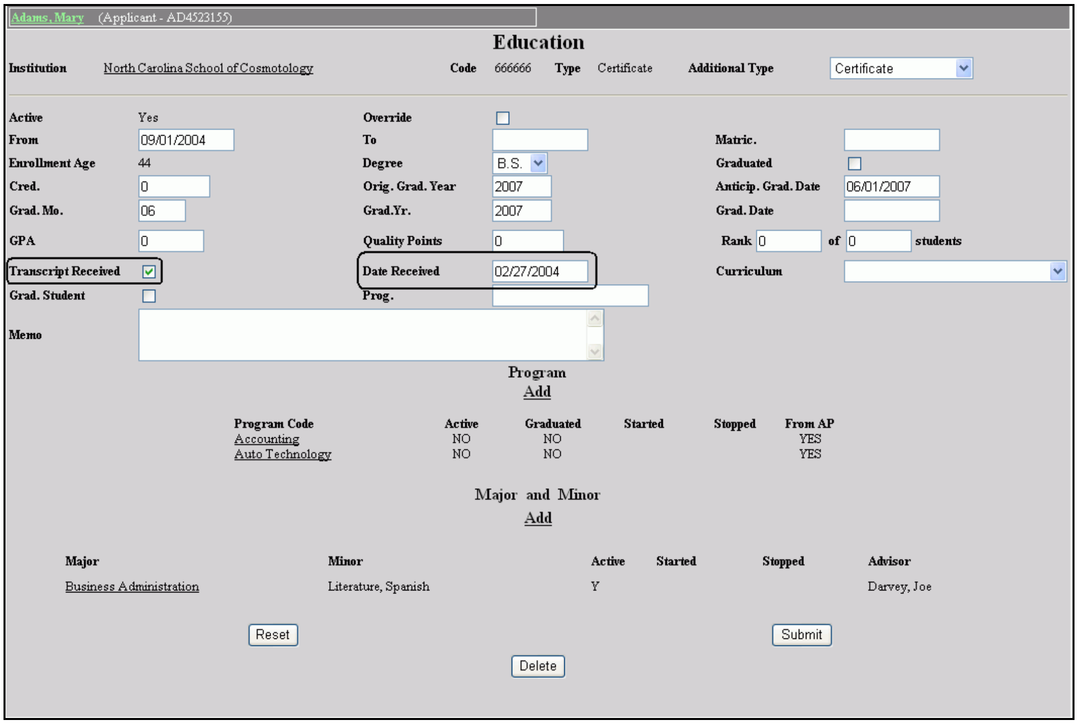
• Figure 29 Institution Search

7. Click the Search button in Figure 29. All institutions of the Type you selected and with a name starting with the characters you entered will be listed as shown in Figure 30.



• Figure 30 Institution List[10]

8. Click the underlined name of the institution from the list. A new education record is created for this applicant as shown in Figure 31.



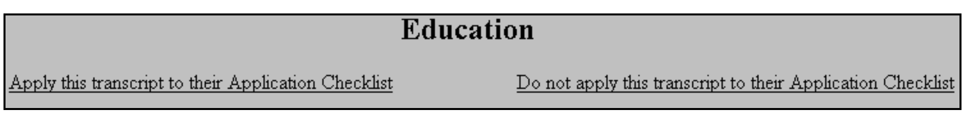
• Figure 31 Education Record for Applicant[10]

9. In Figure 31 enter as much information as your standards require. This is a summary of the transcript. There are fields for much detail which you can use or ignore as you wish.

10. Click the Transcript Received or the Received (for references) checkbox until a checkmark appears. Today's date is put in Date Received. You can type over it to change the date.

    As Figure 31 shows, in the Education record (used for transcripts) you can also fill in Programs and Major-Minor records from this display. It's the same as clicking Programs or Majors in Figure 2.

11. Click the Submit button. You get Figure 32.



• Figure 32 Automatic Forwarding to the Checklist

12. If this transcript or reference does not satisfy a checklist item, click the underlined Do not apply… phase.

13. If the receipt of this transcript or reference satisfies a requirement in your checklist, click the underlined Apply this… phrase in Figure 32. That takes you to a display like Figure 25 where you can choose the item and mark it as completed.

    - Where the checklist items were created with the original Education or Reference record using the button in Figure 27, you see only the transcript item for that institution or the reference item for that named person. Click it and it's checked as completed.

- If there's no transcript checklist item for the institution or reference item with a name, you get the list of nonspecific transcript or reference items, if there are any. You choose from those. See the instructions following Figure 26 (page 21) if you want to mark this item as complete.

ACT-SAT Test Records

Unlike Education and Reference records described above, you do not set up an empty test record in anticipation of receiving one. Rather, when the test results arrive, you enter them.

1. Select **Names** from Figure 1. You get Figure 68.
2. Enter as much as you know of the applicant's name or ID in Figure 68, click Applicant in the category boxes near the bottom, then click the Search button.
3. You get a list of one or more applicants that fit your search criteria. In the list, click the radio button[6] beside the name of the person you are updating, then click the View button. You get a record for that person and a function list on the left like Figure 2.
4. Click the Tests: ACT/SAT function in Figure 2.
5. Pick the kind of test you're entering (Figure 33) and enter the scores.
6. When you click the Submit button for the test, you get the choice to apply it to the checklist or not as shown in Figure 32.

• Figure 33 Test Scores

DISPOSITION ACTIVITIES

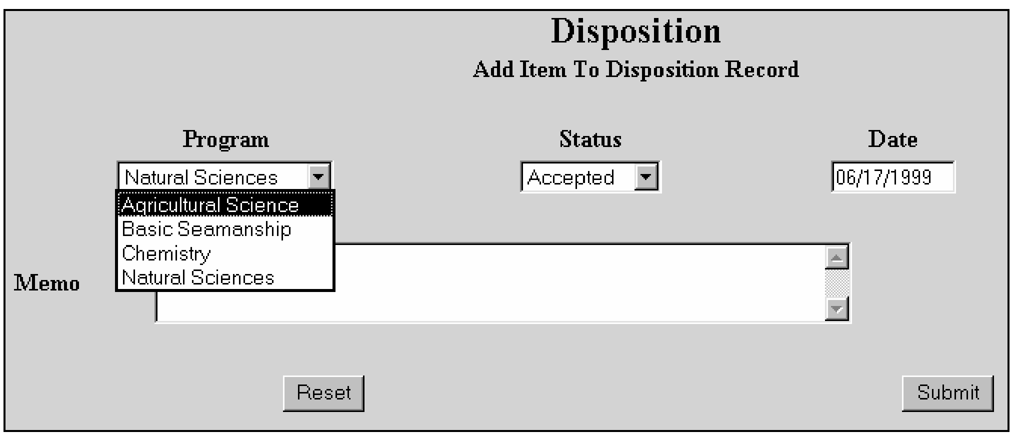
These activities are automatically added to the applicant's record when you enter a disposition, see "Disposition" on page 26. Once added, you can view and edit them as described in "Adding and Updating Activities" above.

DISPOSITION

Disposition – accepting, rejecting, or deferring – is a decision by your faculty and deans. Preceding the decision is getting information about the applicant using checklists as a measure. Once the decision is made, there are activities (page 49) that result from the disposition and updating the applicant's records (below).

Entering or Updating Applicant Disposition

1. Select **Names** from Figure 1. You get Figure 68.
2. Enter as much as you know of the applicant's name or ID in Figure 68, click Applicant in the category boxes near the bottom, then click the Search button.
3. You get a list of one or more applicants that fit your search criteria. In the list, click the radio button[6] beside the name of the person you are updating, then click the View button. You get a record for that person and a function list on the left like Figure 2.
4. Click the Disposition function in Figure 2. You see a display like Figure 34.



• Figure 34 Disposition

5. In Figure 34, use the pulldown[6] arrows to select the Program. Only those programs selected in "Filling in the Application and Creating a Checklist and an Activities List" on page 18 appear in this list.
6. From the list in Status, pick the disposition. The Programs and Status choices are set in "Setting up Programs and Checklists", see page 38.

> If you do not want the applicant to receive the letter or note before seeing his or her disposition on the Web, do not click the Submit button. As soon as you click that button, the applicant can see her or his disposition if you issued PINs to your applicants.

7. Enter a memo if you wish, then click the Submit button. The disposition for this program is added to the applicant's record and is visible the next time he or she logs in. If the applicant has another program that she or he applied for, you can enter the disposition for that by clicking the Disposition function in Figure 2.

   If a disposition activity is assigned to the disposition (accepted, rejected, deferred, etc.) it will be added to the applicant's activity list. See "Setting up Disposition Activities" (page 49) for assignment and "Adding and Updating Activities" (page 43) for viewing and editing.

ADMITTING THE APPLICANT AS A STUDENT

There are three ways to add Student (ST) status for a person.

- You can add the person directly as a student without passing through the prospective student or applicant steps.
- If the "Generate Record Status" (page 13) Web Option is set, clicking the "Student?" checkbox is checked in Figure 35 will add the status of Student (ST) for this person.
- The instructions in "Changing or Adding the Status of Student for an Applicant" on page 53.

Follow the instructions in "Filling in the Application and Creating a Checklist and an Activities List" on page 18 until you see the application record for the program accepted[11].

With the Application Record (Figure 24) displayed, click the "Student?" checkbox[6] until a checkmark appears, then click the Submit button.

• Figure 35 Setting Student Status

[11] A applicant can apply to more than one program. Make sure you select the program that has been approved for admission.

APPLICANT ACCESS TO CHECKLISTS AND DISPOSITION

You can issue your applicants ID[7]s and PIN[4]s so they can check their status anytime via the Web.

The applicant accesses your Web site, selects Applicant log in, and enters his or her ID and PIN in the prompt shown in Figure 79 (page 63).

Logout

Description	Completed	Date Completed	
Checklist Items			
Application Fee	No		
Financial Aid Application	No		
Housing Application	No		
Pre-registration Advising	No		
Promissory Note	No		
Reference - Bob Crane	Yes	12/07/2005	
Reference	No		
Reference	No		
SAT or ACT Scores	Yes	12/08/2005	
SAT or ACT Scores	Yes	12/08/2005	
Seat Deposit	No		
Transcript	No		
Transcript - Cambridge College	Yes	12/06/2005	
Transcript - Manhattanville College	Yes	12/06/2005	
Transcript - Russell Sage College	Yes	12/06/2005	
Transcript	No		
Dispositions			
Disposition Status:	Business/Accept	12/08/2005	General Studies

• Figure 36 Applicant's Status Display

The display in Figure 36 illustrates what the applicant sees. She or he cannot enter any information. This is simply an information display that the applicant can print.

You can also send applicants e-mail notes or letters listing the incomplete checklist items as described in "Checklists as Attachments to Timed E-Mail and Timed Letters" on page 35.

REPORTS

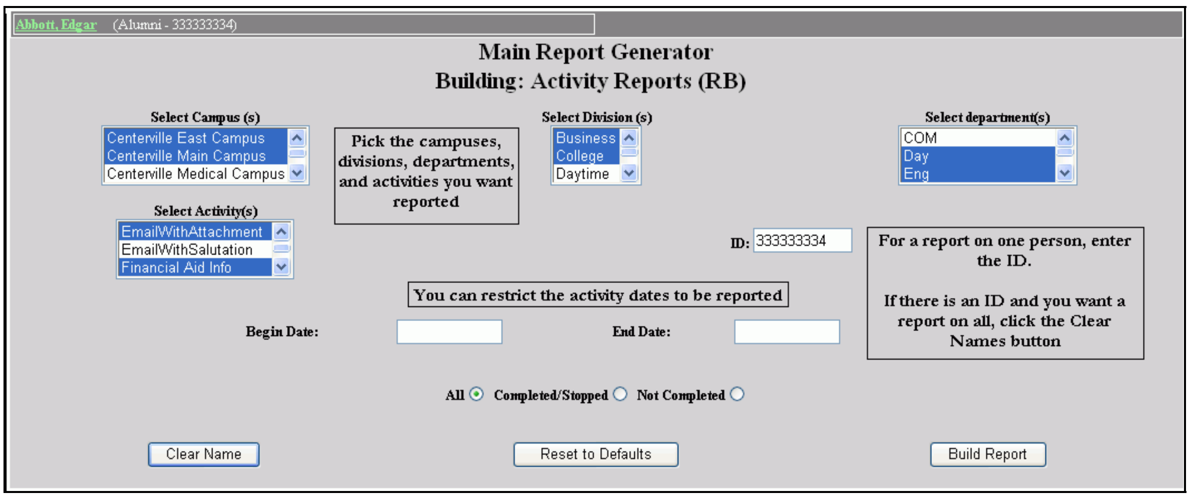
Checklist reports are generally unnecessary since your Applicants can see their status directly on the Web (“Applicant Access to Checklists and Disposition” on page 29).

Checklists is what the applicant needs to do. Activities are what you staff needs to do. See “Figure 76 Activities and Checklists Defined” on page 58 to see how they relate.

Activity Reports

This report lists the scheduled activities by person and shows what has been done and what has not. Your security profile must authorize you to access Reports.

1. Select **Reports** from Figure 1 then Activity Reports(RB)[12] from Figure 2. You get Figure 37.



• Figure 37 Activity Reports Selection Prompt

2. Decide who this list is for, then pick the Activity(ies), campuses and other criteria for activities she or he is responsible for. Click the Build Report button. You can limit the report to a single person by entering her or his ID[7].

If you have been processing a person’s records, you may find his or her ID[7] in Figure 37. Use the Clear Name button to erase the ID[7] number so you get all the people who meet your campus and activity criteria.

[12] The “(RB)” reports use the newer Cold Fusion™ Report Builder. Those without use Crystal Reports™-Enterprise. Where both are offered, you can use either. Generally the “RB” reports work with a larger variety of Web browsers.

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Activity Report

Date Range: All

Activity	Name	ID#	Activity Date	Done Date	Stop Date	Campus
Acceptance Letter						
	1) Abbott, Edgar M	333333334	01/28/2005			CAMP1
	2) Adams, Morticia J	312115555	01/28/2005			CAMP1
	3) Adams, Amy A	000000000	01/28/2005			CAMP1
	4) Arston, Arnie	AR9959292	01/28/2005			CAMP1
	5) Brown, Elizabeth A	047557878	01/28/2005			CAMP1
	6) Brown, Betty	BR6007491	01/28/2005			CAMP1
	7) Jones, Tom	JO3745642	01/28/2005			CAMP1
	8) Michaels, Michelle M	181818181	01/28/2005			CAMP1
	9) O'Conner, Daniel D	OC2222222	01/28/2005			CAMP1
Campus Visit						
	1) Wilson, Will	WI8194849	01/13/2004	01/13/2004		CAMP1
Catalog						
	1) Abbott, Edgar M	333333334	01/28/2005	01/28/2005		CAMP1
	2) Adams, Morticia J	312115555	01/28/2005	01/28/2005		CAMP1
	3) Adams, Amy A	000000000	01/28/2005	01/28/2005		CAMP1

• Figure 38 Activity Report

3. Figure 38 is the result. Your list will certainly be longer. The list is in alphabetical order by Activity name then the last name of the prospective students. For more information on printing, paging through reports, or searching for content, see the text "Standard Reports".

4.

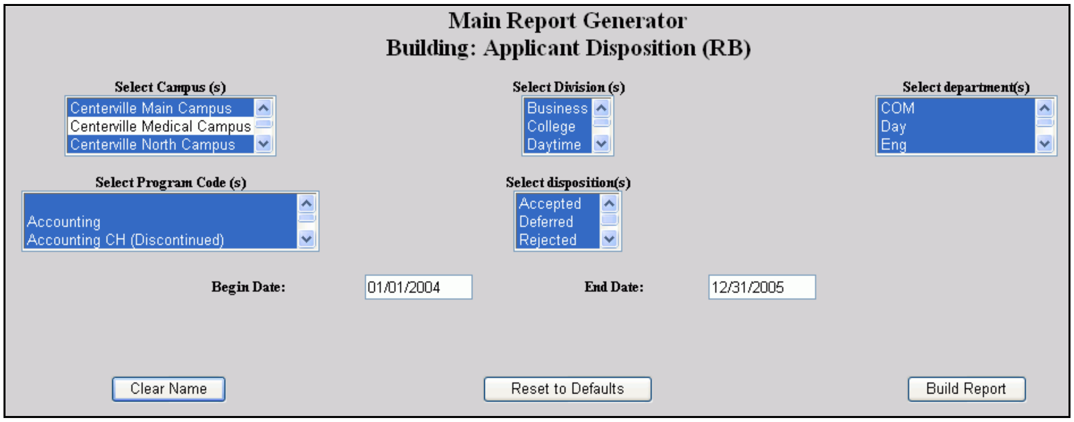
Applicant Disposition Report

There are two different reports available:

- Applicant Disposition (RB)[12] shows only the most recent dispositions for each applicant.
- Applicant Disposition ALL-RB[12] shows all the dispositions for each applicant.

It's assumed that each Applicant has an Application record for each program. Those without an Application record for each program will not appear in this report.

1. Select **Reports** from Figure 1 then the disposition report you want from Figure 2. That yields Figure 39.



• Figure 39 Applicant Disposition Report Prompt

2. In Figure 39 make your choices, then click the Build Report button.

   Select **Campus(es)**, **Division(s)**, **Department(s)**, and **Program(s)** to limit whose records you want to see. You can select more than one campus[21].

   Select the **Disposition** for the report.

   Begin Date and **End Date** let you focus on only a limited set of entry dates. They are set in the Application record (Figure 24).

Applicant Disposition Report

From 01/01/2004 To 12/31/2005

Entry Date	Applicant	ID#	Disposition	Program	Disp. Date	App. Date
01/13/2004						
	Jones, Jim	JO8409545	Accepted	BAAC1	01/13/2004	01/13/2004
	Total Accepted for BAAC1		**1**			
01/21/2004						
	Wilson, Will	WI8194849	Accepted	EDUC1	01/13/2004	01/13/2004
	Total Accepted for EDUC1		**1**			
09/01/2004						
	Adams, Mary	AD4523155	Rejected	AUTT3	04/21/2004	04/21/2005
	Total Rejected for AUTT3		**1**			
	Adams, Mary	AD4523155	Accepted	BAAC1	04/21/2005	04/21/2005
	Total Accepted for BAAC1		**1**			

• Figure 40 Applicant Disposition Report

3. Figure 40 is the result. The list is in entry date order then alphabetical by last name. For more information on printing, paging through reports, or searching for content, see the text "Standard Reports".

Applicant Listing

1. Select **Reports** from Figure 1 then Applicant Listing (RB)[12] from Figure 2. That yields a prompting display similar to Figure 39.

2. In Figure 39 make your choices, then click the Build Report button.

Select **Campus(es)**, **Division(s)**, **Department(s)**, and **Program(s)** to limit whose records you want to see. You can select more than one campus[21].

3. Select the **Entry Dates** for the report to keep the list to only those of interest. If you leave this blank, you get the records of all applicants.

12/21/2005 01:59:37 PM SonisWeb200 Page 3 of 7

Applicant Listing

From To

Pamela Broadhurst	**ID:** 333333333	**Birthdate:** 08/14/1982	**Gender:** Female	**Ethnic Code:** H
12 E. Harvard	**Campus:** Centerville Main	**Division:** Evening	**Dept:** Science &	
Chapel Hill, NC 27516	**Program:** Accounting		**Entered:** 08/12/2001	
Phone:	**Email:** pbroadh@vfp.edu		**Applied:** 05/17/2001	
Elizabeth Brown	**ID:** 047557878	**Birthdate:** 05/05/1952	**Gender:** TBD	**Ethnic Code:** H
Brown Billing Address	**Campus:** Centerville Main	**Division:** Daytime	**Dept:** Science &	
Chapel Hill, NC 27511	**Program:** Accounting		**Entered:** 12/03/2002	
Phone:	**Email:**		**Applied:** 09/09/2001	

• Figure 41 Applicant Listing Example

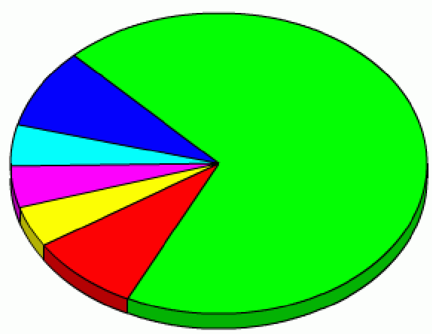
4. Figure 41 show a couple of entries from the report. It's a summary of key information on the applicants. For more information on printing, paging through reports, or searching for content, see the text "Standard Reports".

Applications by City, State-Province, and Zip-Postal Code

1. Select **Reports** from Figure 1 then Applications by City/State/Zip (RB)[12] from Figure 2. That yields a prompting display similar to Figure 39. Once you pick your selection criteria and click Build Report, you see Figure 42.

Applications by City, State, and Zip Code

State	
CT	2
NC	16
NY	2
PA	1
UN	1
VT	1
TOTAL:	**23**



• Figure 42 Applications by City, State, and Zip

- Clicking the underlined State code brings you a list of cities for the applicants.
- Within the state list, clicking an underlined city brings you a list of Zip-Postal codes for the applicants.

- Within the city-locality list, clicking an underlined Zip-Postal code provides a list of the applicants for that location.

Only those with an Application record (Figure 24, page 19) and an Address record are enumerated for this report.

APPLICANT CHECKLIST REPORT

Applicants logging on to your Web site see an online list of checklist items and statuses[13].

46 APPLICATIONS WITH MISSING CHECKLIST ITEMS		
Applicant	**Entry Date**	**Program**
Adams, Mary (AD4523155)	09/01/2004	Accounting
Adams, Mary (AD4523155)	09/01/2004	Auto Technology
Adams, Morticia J. (312115555)	08/01/2003	Accounting
Adams, Morticia J. (312115555)	08/01/2002	Classical Piano
Ammons, John M. (AM7129759)	08/08/1988	Accounting
Arnold, Jane (AR1833324)	09/01/2004	Classical Piano
Arronson, Jacob R. (000000542)	09/01/2004	Classical Piano

• Figure 43 Applicants with Missing Checklist Items

You can include an automatically-added "missing checklist items" list to timed letters and e-mail notes.

Betty Brown for Classical Piano 08/08/2004	
Missing Checklist Items	**Return**
Application Fee	
Audition/Portfolio	
Health Records	
Reference	
SAT or ACT Scores	
Transcript	

• Figure 44 Missing Items for an Individual

This new "Applicant Checklist Report (Missing Items)" gives your staff the same information in report form. Standard report selection criteria are used to determine which applicants are included in the list.

Figure 43 shows the applicants with missing checklist items. Click the underlined name of an applicant and you get the detailed list shown in Figure 44. You can print these reports by clicking the printer icon on you Web browser.

[13] Of course you have to issue your applicants IDs and PINs for them to log on and see their checklist.

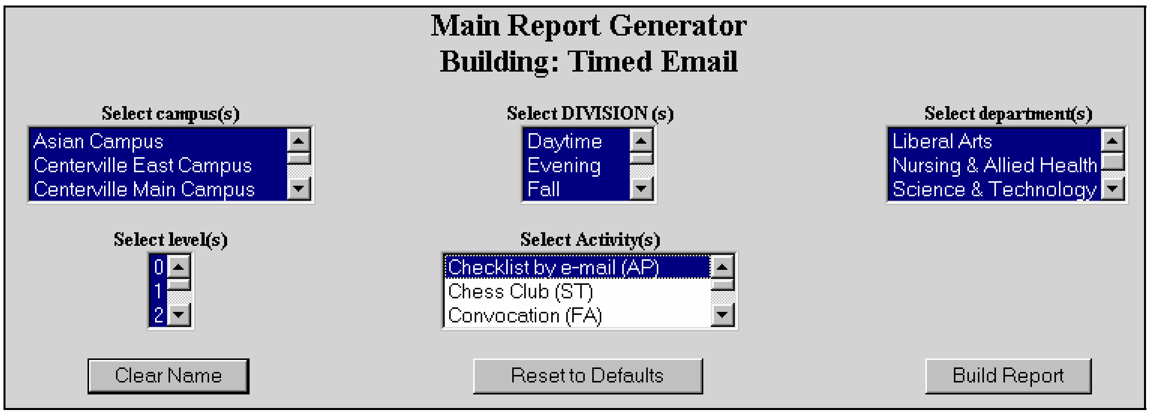
Checklists as Attachments to Timed E-Mail and Timed Letters

Applicants can look at their checklist in Figure 36 (page 29). You can also send applicants e-mail notes and/or letters listing their incomplete checklist items.

1. You set up an Letter or E-Mail activity as shown in Activities Table (page 43) with "Incl[ude] Checklist" checked.

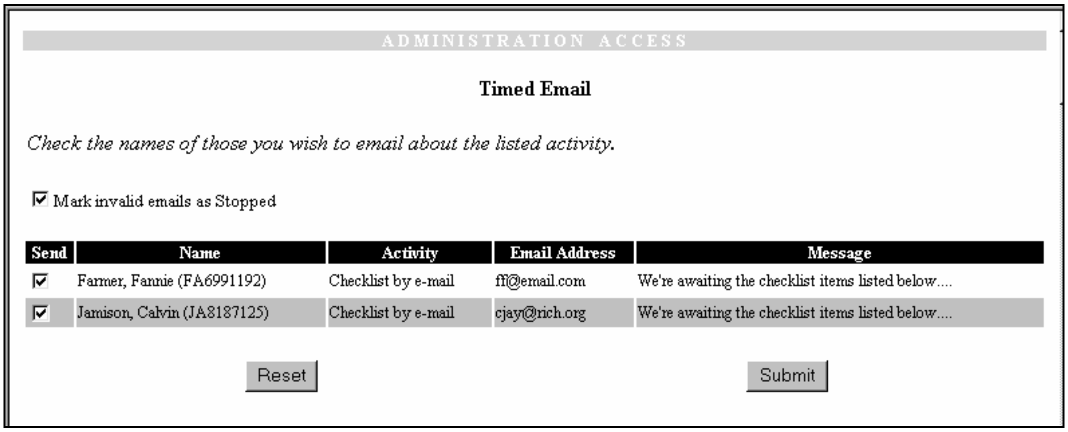
2. Make sure that Activity is in each applicant's records (Figure 2). You can make it one of the automatically assigned activities in the standard Core list (page 41).
3. When you're ready to send these "checklist" e-mail notes or letters, click **Reports** in Figure 1 then either Timed E-Mail (RB)[12] or Timed Letters (RB)[12] in Figure 2. You get Figure 45.

   For details on these functions, see the SONISWEB® manual "Timed Letters, Timed E-Mail & Timed Mail-Merge".



• Figure 45 Timed Correspondence with Checklists Included

4. Pick from the choices in Figure 45 and click Build Report.


ADMINISTRATION ACCESS

Timed Email

Check the names of those you wish to email about the listed activity.

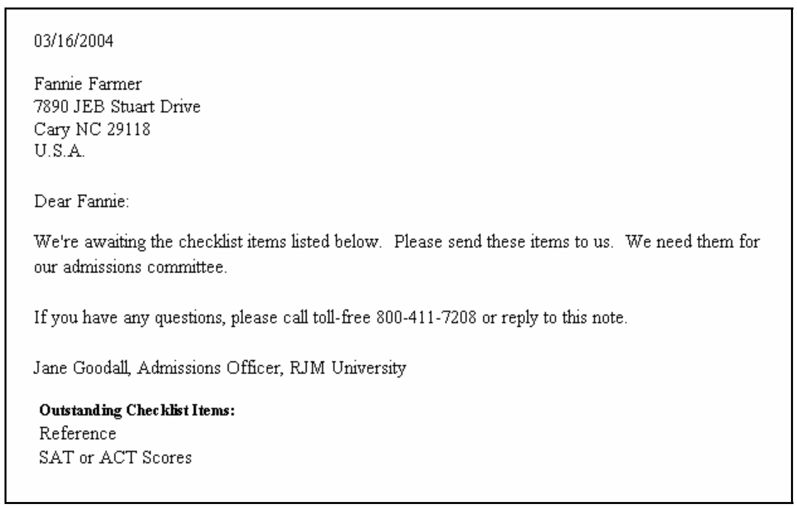
☑ Mark invalid emails as Stopped

Send	Name	Activity	Email Address	Message
☑	Farmer, Fannie (FA6991192)	Checklist by e-mail	ff@email.com	We're awaiting the checklist items listed below....
☑	Jamison, Calvin (JA8187125)	Checklist by e-mail	cjay@rich.org	We're awaiting the checklist items listed below....

Reset Submit

• Figure 46 Timed E-Mail with Checklist

5. If it's e-mail you get a list like Figure 46. Make sure there a checkmarks by the names you want to receive this note then click Submit.


03/16/2004

Fannie Farmer
7890 JEB Stuart Drive
Cary NC 29118
U.S.A.

Dear Fannie:

We're awaiting the checklist items listed below. Please send these items to us. We need them for our admissions committee.

If you have any questions, please call toll-free 800-411-7208 or reply to this note.

Jane Goodall, Admissions Officer, RJM University

Outstanding Checklist Items:
Reference
SAT or ACT Scores

• Figure 47 Timed Letter with Checklist

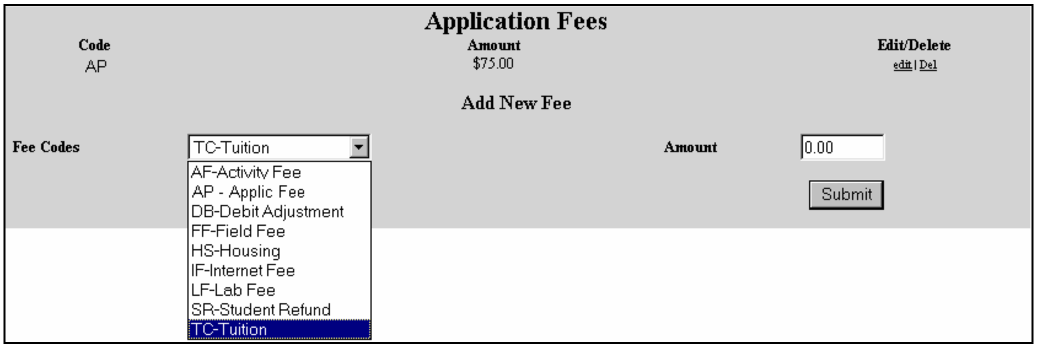
If it's a letter, it'll look like Figure 47. Use the report generator's printer icon, not the browser's print icon, to print the letters for mailing.

With e-mail, the activity is checked off as complete in the applicants' activity records. For letters, you're given the choice of checking it off or not.

SETTING UP APPLICATION FEES

You have the option of establishing application fees. These fees are generated when an application record is created for a prospective student, an applicant, or an online applicant.

1. Select **Systems** from Figure 1 then Application Fees in Figure 2 to get Figure 48.



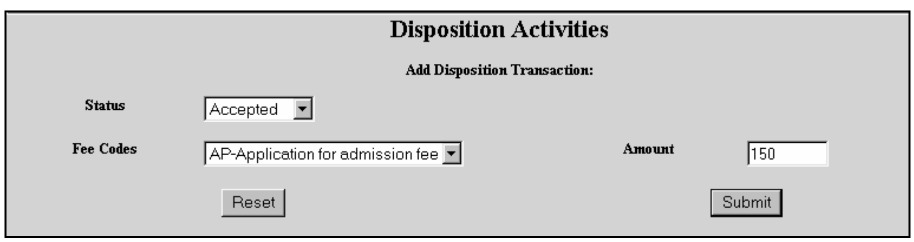
• Figure 48 Application Fees

If no application fees have been established, only the "Add New Fee" part of Figure 48 is present.

2. To add a new fee, use the pulldown to select the fee code, enter the amount of the fee, then click the Submit button.

3. Hidden behind the pulldown list in Figure 48 is a Reset button. If you click that before the Submit button, your entries are erased so you can start over.

4. To change an existing fee, click edit | in the upper right of Figure 48. That yields Figure 49.



• Figure 49 Edit Application Fees

5. Change the transaction code and/or amount then click the Submit button to save your changes.

6. To delete an application fee, click | Del in the upper right of Figure 48. You get a confirming display asking if you really mean it. If you do, confirm it and the application fee is deleted.

SETTING UP PROGRAMS AND CHECKLISTS

There are three kinds of checklists:

- Core items which every applicant must have. Transcripts are typical.
- Program items which applicants must have for the program. An audition for a music major, a record of health immunizations for a nursing or medical school are examples.
- Optional items which are not a core need nor a program requirement. An example is the need for a visa or residency card for students who are not citizens of your nation.

"Setting up Programs" below covers defining your programs so you can apply checklist items and activities to them.

"Creating and Changing Checklist Items" on page 39 shows you how to create checklist items.

"Building the Core and Program Checklists" on page 41 guides you in applying items to a core or program checklist.

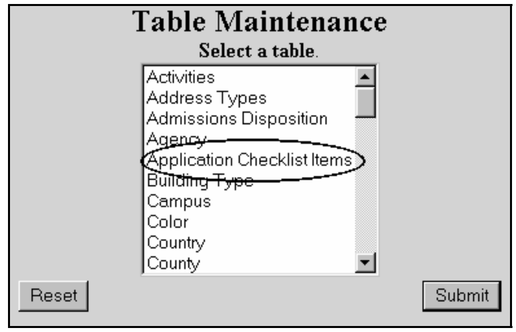
See "Terms" on page 58 for suggestions on what should be a checklist item and what should be an activity.

Setting up Programs

Programs are covered in the SONISWEB® text "Table Configuration & Maintenance". See that text to set up programs and programs types. See the text "Financial Record-keeping and Billing" for information on program fees.

Creating and Changing Checklist Items

Checklist items are what make up applicants' checklists. For example, you set up the "Portfolio" item and use it in checklists for art, creative writing, and music composition programs. If you carefully name it, you can create a single checklist item and use it for many programs.



• Figure 50 Table Maintenance - Application Checklist Items

1. Select **Systems** from Figure 1 then Table Maintenance from Figure 2. That yields Figure 50.
2. Scroll down the list of tables to Application Checklist Items then click the Submit button. You see Figure 51.

Table Maintenance - *appchk*

ADD New Record   **OR Edit Record (click on first field):**

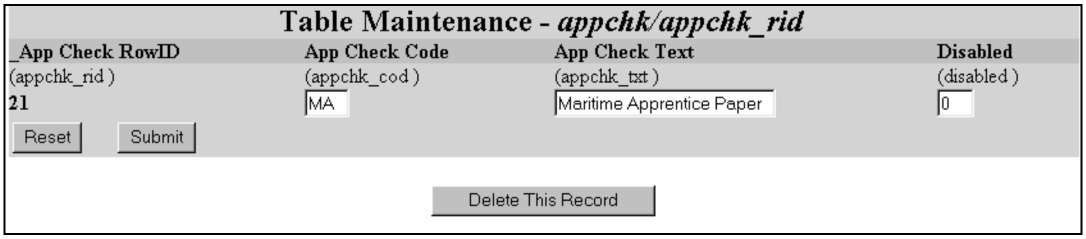
_App Check RowID	App Check Code	App Check Text	Disabled
(appchk_rid)	(appchk_cod)	(appchk_txt)	(disabled)
10	AF	Application Fee	0
17	AD	Audition/Portfolio	0
12	DL	Drivers License	0
11	AL	Green Card/Visa	0
13	HR	Health Records	0
18	RC	Recording	0
14	RF	Reference	0
15	SC	SAT or ACT Scores	0
16	TR	Transcript	0

• Figure 51 Application Checklist Items Table

In Figure 51 you see an alphabetical list of all items.

You can set up named transcript or reference items using the process described on page 21.

3. To add a new item, click the Add button. To edit an existing item, click its number button. In either case, you get a display like Figure 52, although it is blank for a new item.



• Figure 52 Checklist Item Record

4. Enter or change the data in the table, then click the Submit button.

   App Check RowID is automatically assigned by SONISWEB®.

   App Check Code is the abbreviation you want for this item.

   App Check Text is the description of the item that appears on most displays and reports.

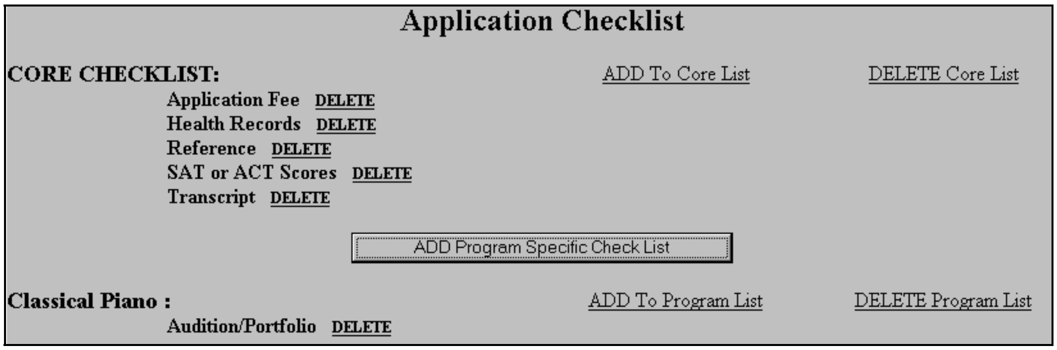
   Disabled should be zero (0) unless you want to disable this item so it can no longer be selected. A one (1) mean it is disabled and cannot be selected for checklists.

5. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it.

Building the Core and Program Checklists

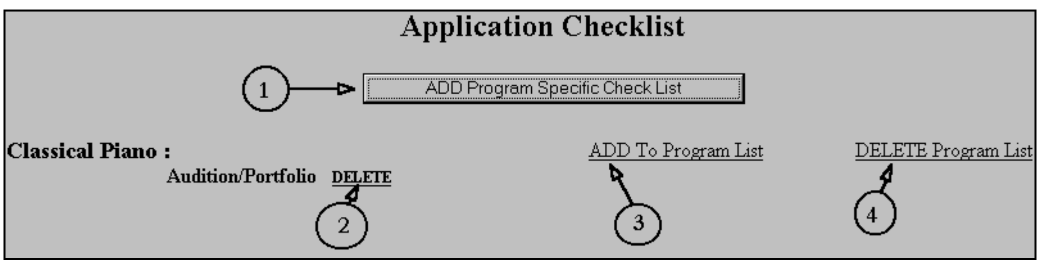
The programs are defined (page 38). You have created the checklist items (page 39). Now it is time to create the checklists.

1. Select **Systems** from Figure 1 then Application Checklist from Figure 2. That yields Figure 53.



• Figure 53 Application Checklist Display

2. Select the action you want to take referring to Figure 54. You click the underlined word or phase in Figure 54 to execute the function.



• Figure 54 Application Checklist Actions Defined

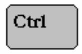
1 Build a new checklist for a specific program. When you add a new program, you will do this.

2 Delete this checklist item only for this program. If the item no longer applies to the program, delete it. You get a confirming display asking if you really mean it.

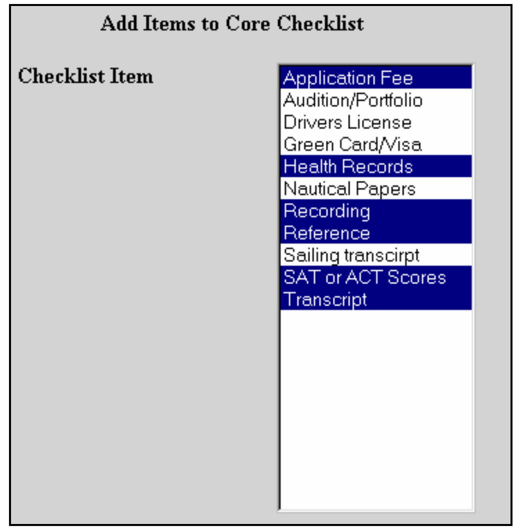
3 Add a new checklist item to this existing program checklist. Usually this is some new requirement for the program.

4 Delete the entire checklist for this program. That means you must start over defining the checklist for the program. You get a confirming display asking if you really mean it.

As you add items to a checklist, you get a display like Figure 55. (The items in Figure 55 were defined in “Creating and Changing Checklist Items”, page 39.)

Selecting and removing items from the list requires the use of the  key on your keyboard:

- Press and hold the **Ctrl** key and you are telling the system “don’t change anything but what I click with my mouse”.
- With the **Ctrl** key held, when you click a highlighted item, it is removed from the selection and the highlighting disappears.
- With the **Ctrl** key held, when you click an item not highlighted, it is selected and it is highlighted.
- When you release the **Ctrl** key, whatever is left highlighted is what you selected and will be in the checklist. The next time you look at Figure 53, you will see the items in the list.



• Figure 55 Checklist Item Selection

If you click an item in Figure 55 without holding the **Ctrl** key, you are telling the system “Pick only this item, remove all other selections”.

SETTING UP APPLICANT ACTIVITIES AND DISPOSITION ACTIVITIES

Applicant activities are recorded for each person as described in "Adding and Updating Activities" on page 43. Disposition activities are automatically created for each applicant when the disposition is entered in SONISWEB® as described in "Disposition" on page 26.

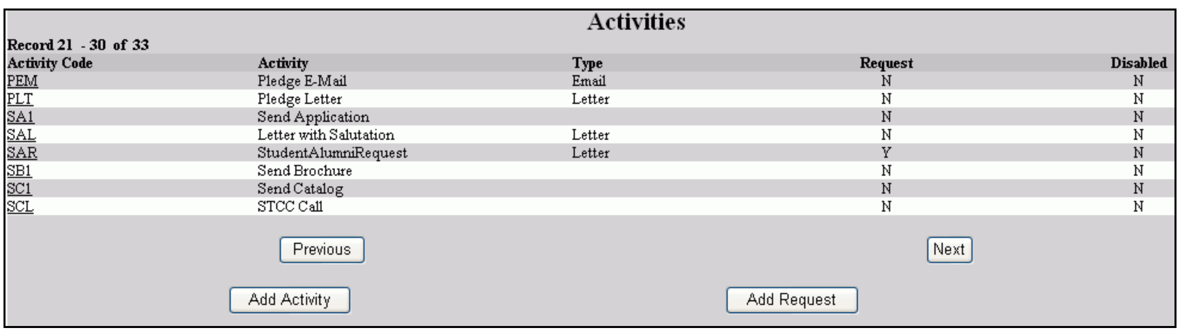
Adding and Updating Activities

Activities Table

The Activities table contains activities for constituents, prospective students, applicants, nearly anyone in the SONISWEB® databases. It is a broadly shared table. In changing the table, take care not to change or delete a table entry used by another staff person for applicants, recruiting activities, etc.

Activities are defined in a table that is accessed through Activities under Systems. Your security profile must give you permission to use Activities in order to access the tables.

1. Log on to SONISWEB® (page 63).
2. Select **Systems** from the top list Figure 1. You get Figure 2.
3. From the list in Figure 2, click Activities. That yields Figure 56.



Activities

Record 21 - 30 of 33

Activity Code	Activity	Type	Request	Disabled
PEM	Pledge E-Mail	Email	N	N
PLT	Pledge Letter	Letter	N	N
SA1	Send Application		N	N
SAL	Letter with Salutation	Letter	N	N
SAR	StudentAlumniRequest	Letter	Y	N
SB1	Send Brochure		N	N
SC1	Send Catalog		N	N
SCL	STCC Call		N	N

Previous | Next

Add Activity | Add Request

• Figure 56 Activities Table

In Figure 56 you see an alphabetical list in Activity Code order.

Record 21 - 30 of 33 shows you how many Activity records there are and which you are viewing in this display.

Activity Code PEM is the code defined when the activity was initially entered.

Activity Pledge E-Mail is the description for the activity.

Type / Email / Letter tells you whether or not it is a timed letter or e-mail note and what status[14] of persons it is for.

Request / N if "Y" means this activity can be requested via a student, alumni/ae, etc. from their online access to SONISWEB®.

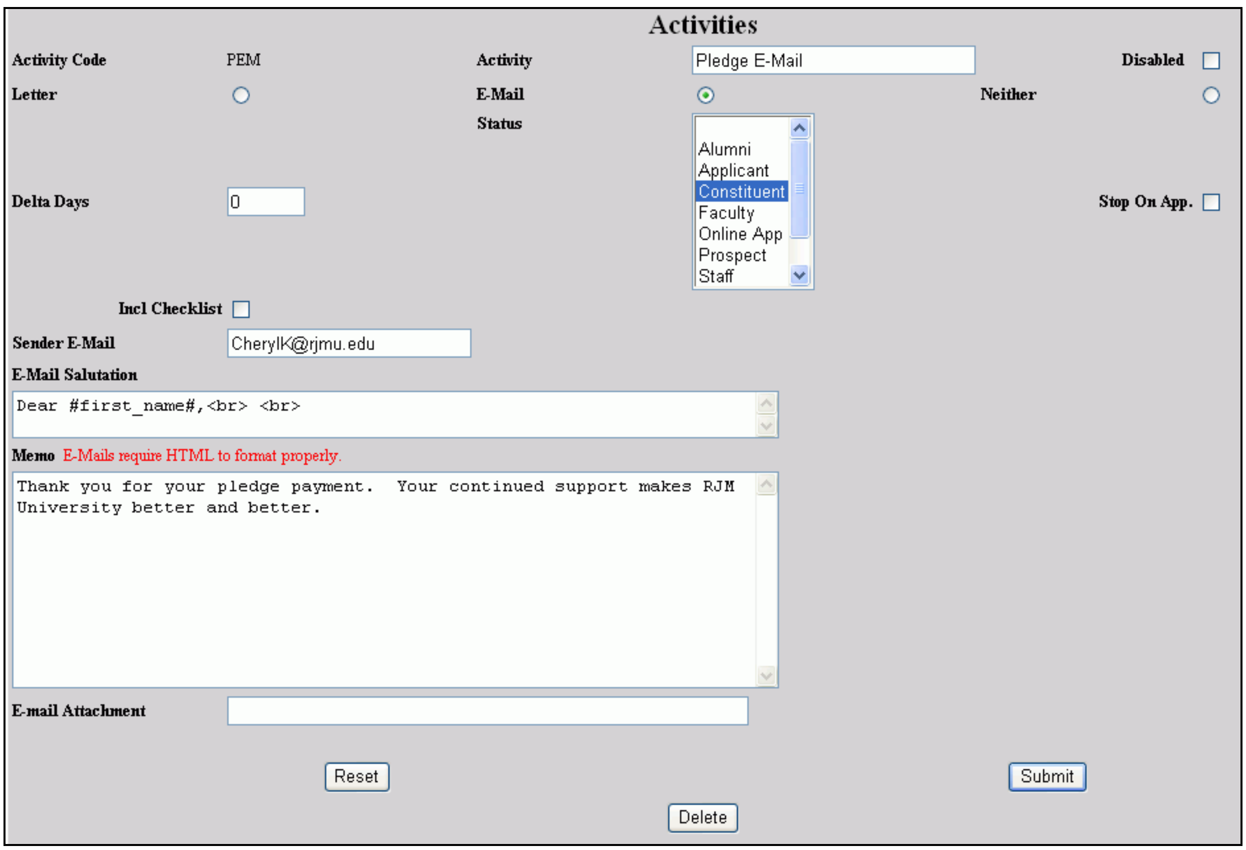
Disabled / N specifies whether ("Y") or not ("N") this activity is still active and usable.

Previous | Next are buttons that let you move through the list of activities.

Add Activity to add a new activity.

Add Request to add an activity that can be directly requested by a student, alumni/ae, etc. from their online access to SONISWEB®.

4. To add a new activity, click the "Add" or "Add Request" button. To edit an existing activity, click the underlined Activity Code (SA1) for that entry. In either case, you get a display like Figure 57, although it is blank for a new entry.



• Figure 57 Activity Record

[14] Status is the role a person has in your institution. Examples are PS for Prospective Student, AL for Alumni/ae, ST for Student, etc.

5. Enter or change the data in the table.

Activity Code is the abbreviation you want to use for this activity. When adding a new activity, you enter the code in a field. When editing an activity, you cannot change the code.

Activity is a description that should be clear, unique and related to the Activity Code so users know what it is and where it is used.

Disabled checkbox[15]; to disable this activity so it can no longer be selected, click the box until a checkmark appears. To enable the activity selected, click the box until it is empty.

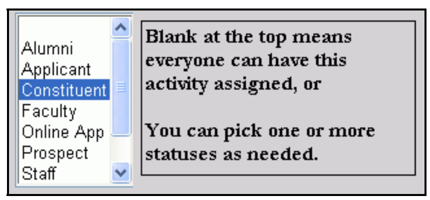
Letter radio button[15]; a filled circle means this activity is a timed letter and will appear as a choice when selecting timed letters. Click the radio button until it is filled if this is a timed letter activity.

E-Mail radio button[15]; a filled circle means this activity is a timed e-mail note and will appear as a choice when selecting timed e-mail. Click the radio button until it is filled if this is a timed e-mail activity.

Neither radio button[15]; a filled circle means it's neither a timed letter nor an e-mail note.

Delta Days is a trigger that makes a person eligible for a timed letter. See "Timing and 'Delta Days' Explained" on page 46.

Status usage is shown in Figure 58.



• Figure 58 Status and Activities

Stop on App. is for applicants. It means that when an application is recorded in a prospective student's Inquiry Details Record, this letter will not be mailed to him or her. The activity is marked as "stopped" and will not appear on the timed letter report.

When a person is admitted as a student – whether an application has been recorded or not – all activities marked as "Stop on App." are treated as though an application has been received.

Incl[ude] Checklist is also unique to Applicants. It means the applicant checklist items not completed are to be listed at the end of the letter or e-mail note. See the text "Applicant Checklists, Activities, and Disposition" for more information.

Sender E-Mail is an option if the E-Mail radio button is filled. It is what will appear on the "From" and/or "Reply to" headers in the e-mail note. For example, if several people will be sending this e-mail note but you want all replies to come to one specific address, put that address in "Sender E-Mail".

[15] See page **Error! Reference source not found.** for guidance.

E-Mail Salutation lets you personalize the note. See "Salutation Choices" on page 47 for the choices.

Memo:

If the Letter or the E-Mail radio button is filled, this is the body of the letter or the e-mail note.

If the Letter or the E-Mail radio button is blank, it is only a comment to further describe this activity.

E-mail Attachment is an option if the E-Mail radio button is filled. You enter the file name of something you want to attach to the note. It can be anything that your e-mail software permits. In Figure 59 it's a picture of the class rings available to seniors. Send any files you want to attach to the SONISWEB® administrator to be placed in the SONISWEB® Batch folder[16] so you can attach them.

• Figure 59 E-Mail Attachment Example

6. Click the Reset button to clear what you entered and start over.
7. Click the Submit button to store what you entered. That yields Figure 56.
8. You can temporarily disable an activity so it cannot be selected as described in **Disabled** above. If you wish to permanently delete this entry, click the Delete button. You get a confirming display asking if you really mean it.

Timing and 'Delta Days' Explained

A "Delta Days" of 0 means "right now", a "Delta Days" of 30 means thirty days after the Activity was placed in the person's record. Examples:

- You fill in the Inquiry Detail Record for a prospect. Typically your recruiting plan[17] specifies that three e-mail notes or letters are to be sent, so you set up three activities.

  The first e-mail note is sent the next time you run Timed E-Mail. In Figure 57, E-Mail is checked, Stop on App. is checked, and Delta Days = 0. (If an application is recorded before this first e-mail note is sent it will not, of course, be sent.)

  The second is sent in 30 days if an application has not been received. In Figure 57, you check E-Mail, Stop on App., and set Delta Days to 30. It is sent anytime you run Timed E-Mail after 30 days has passed if an application has not been received.

  A third is sent in 60 days if an application has not been received. In Figure 57, you check E-Mail, Stop on App., and set Delta Days to 60. It is sent anytime

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16 Using Web Options, your SONISWEB® administrator can change the directory-folder used for these attachments.

17 See the text "Recruiting Prospective Students".

you run Timed E-Mail after 60 days has passed if an application has not been received.

- You add an activity to the records of every Constituent who has expressed interest in work on the new library. Letter is checked. Stop on App. and Delta Days are ignored. The letter is sent the next time you run Timed Letters.

Salutation Choices

You use special codes to retrieve the salutation information from each person's Biographic record. Here they are:

First Name: you enter #first_name#
Last Name: you enter #last_name#
Middle Initial: you enter #mi#
Prefix such as Mr., Ms., Prof: you enter #prefix#
Suffix such as Jr., III: you enter #suffix#
Maiden Name: you enter #maiden#

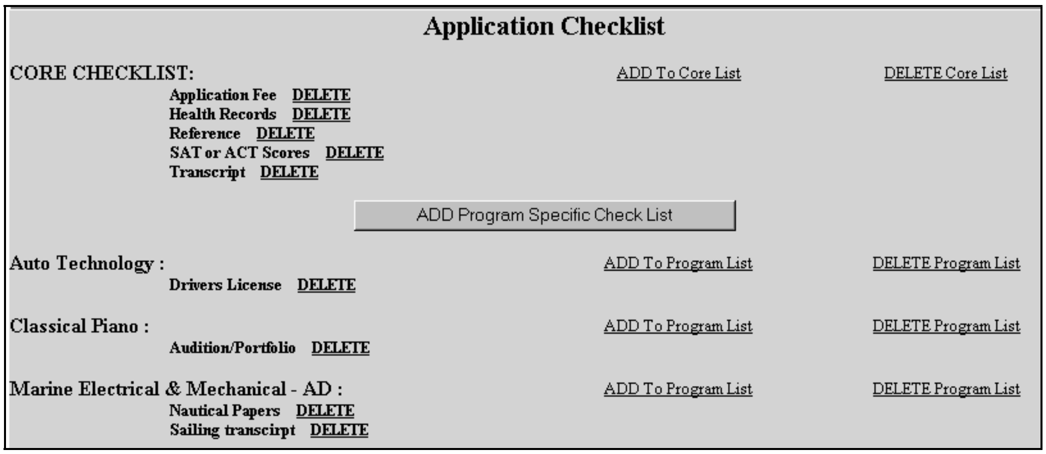
You can put punctuation within the salutation. If you know Cold Fusion™ logic, you can add logic operators to control what is included.

> SONISWEB® does not send letters or e-mails on its own. You invoke the timed function as with **Reports** functions such as Timed Email, etc. Everyone's record is then examined for the "letter" or "e-mail" activity you selected. If the criteria described above are met, a letter or note for that person is displayed for printing or sending.

Building the Core and Program Activities

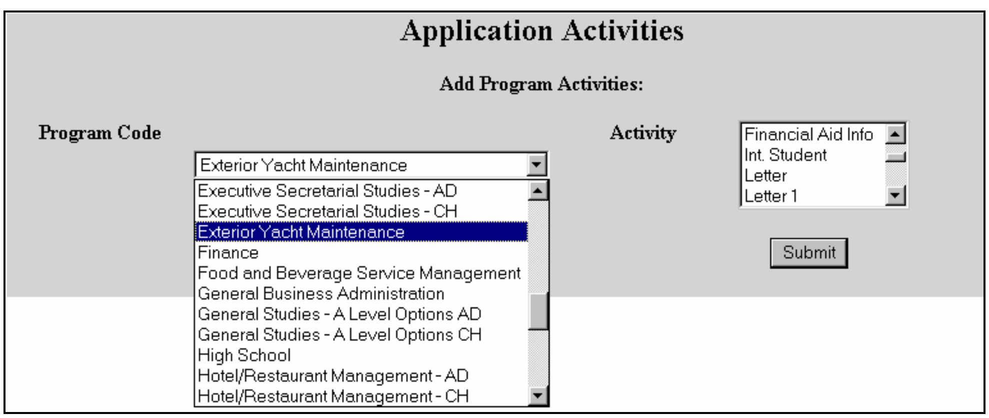
You defined the programs in "Setting up Programs" (page 38). You have created the activities in "Adding and Updating Activities" (page 43). Now it is time to connect programs to activities.

1. Select **Systems** from Figure 1 then Application Activities in Figure 2. That yields Figure 60.



• Figure 60 Application Activities Display

2. Attaching activities to programs is just like connecting checklists. See the guidance below Figure 54 (page 41) to interpret Figure 60. You click the underlined word or phase in Figure 60 to execute the function.



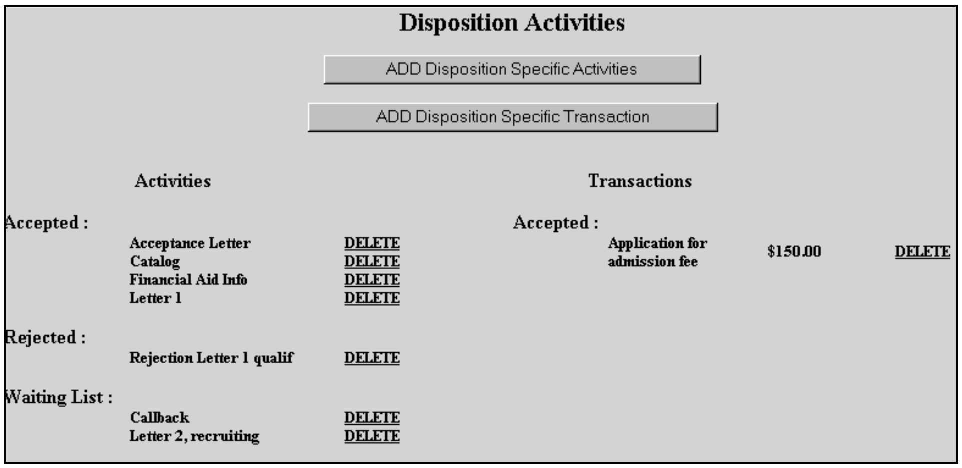
• Figure 61 Adding Activities to Programs

As you add activities, you get a display like Figure 61. You scroll down the list, click the activity or activities you want to add, then click the Submit button and it is added. The next time you look at Figure 60, you will see the activity in the list. The activities in Figure 60 were defined in "Adding and Updating Activities" (page 43).

Setting up Disposition Activities

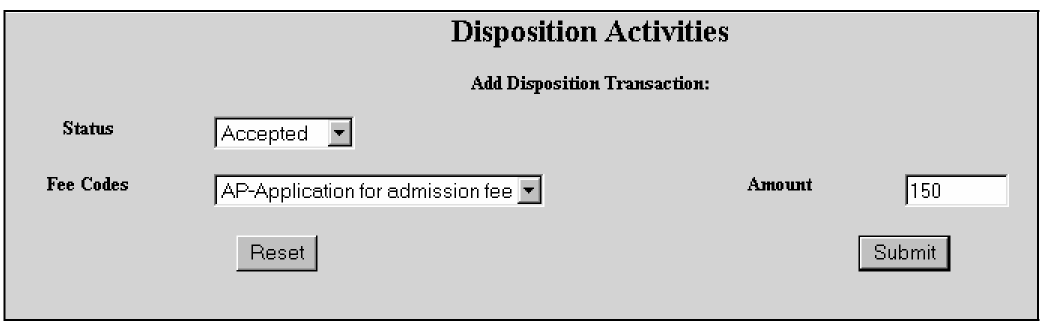
Activities are automatically added to applicant records when you record a disposition as described in "Disposition" on page 26. To attach an activity to a disposition, follow the steps below.

1. Select **Systems** from Figure 1then Disposition Activities in Figure 2. That yields Figure 62.



• Figure 62 Disposition Activities List

2. To add a new activity to a disposition, click the Add button in Figure 62. That yields Figure 63.



• Figure 63 Disposition Activities Display

3. In Figure 63, use the pulldown[6] arrow to pick the disposition to which you want to attach activities.

4. Scroll through the list of activities, find the one you want, click it, then click the Submit button. The next time you see Figure 62, the added activity will be present in the list.

   If you know the name of the activity you want to attach, there is a quick way to find it in the list. Click the first item in the list, then use your keyboard to enter the first letter of the activity name (description). That takes you directly to the first activity starting with that letter.

5. To delete an activity from a disposition, click the Delete in Figure 62. You get a confirming display asking if you really mean it.

CHANGING OR ADDING A STATUS OF APPLICANT FOR A PROSPECT

There are two ways to add Applicant (AP) status for a Prospective Student (PS).

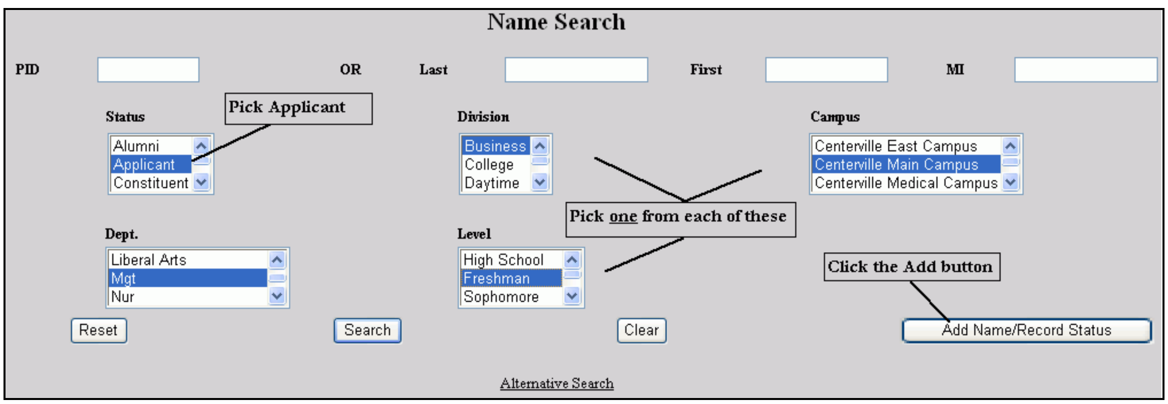
- The automatic change when Generate Record Status is checked on (page 13) and the "Application Received" checkbox is checked in Figure 14 (page 12).
- The instructions below where you explicitly make the addition.

You can change a person's status – eliminate the old status – or you can you simply add a new one while keeping the old one.

> Many schools prefer to add a status and keep the old one(s) so they can do retrospective studies on those who inquired, those who applied, and those accepted.

Before you can add "Applicant" status to a prospective student, you must record the receipt of his or her application. That is done in "Receiving an Application" (page 8). If you have no record of this person, see "Adding a New Applicant Status or a New Applicant" on page 14.

1. Select **Names** from Figure 1. You get Figure 64.



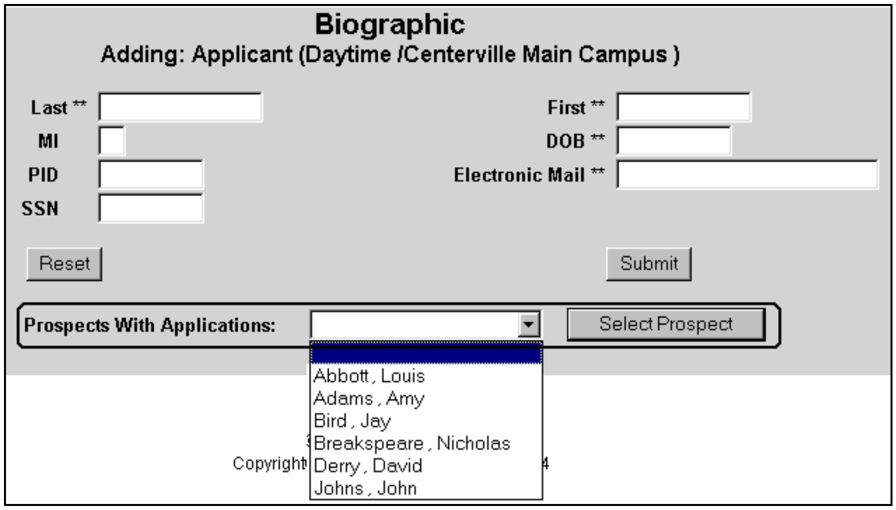
• Figure 64 Names Search Prompt

2. In the category boxes near the bottom of the display click Applicant, the division the person is applying to, and the campus or location you expect the applicant to attend. Only one item in each "user type" will be selected. If you select more than one item, you receive an error message as illustrated in Figure 65.

You may choose only one USER TYPE when ADDING users to the system.

• Figure 65 New User Error

3. Click the Add Name/Record Status button. You see a display like Figure 66.

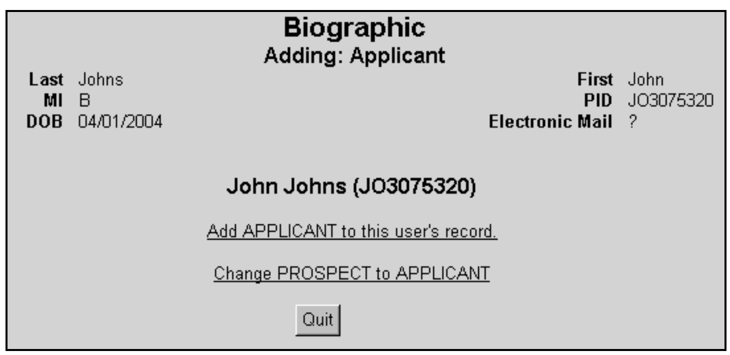


• Figure 66 Add Applicant Status Step 1

4. Click the pulldown by "Prospects With Applications" to get a list of those eligible for the new status.

   This is a list of those whose "Application Received" checkboxes are checked[18]. If you don't see the person you expected in the list, check his or her Prospect Inquiry Detail record, Figure 14 (page 12).

5. Click the name of the prospective student whose status you want to add then click the "Select Prospect" button. This yields Figure 67.



• Figure 67 Add-Applicant Status Choices

6. In Figure 67 you must make a choice. If your institution maintains prospect records for recruiting studies, click Add APPLICANT. That preserves all of the prospective student's status. If you wish to discard the prospect status, click Change.

[18] If the "Generate Record Status" for applicant is checked (Figure 15, page 13), the status is added without going through this process.

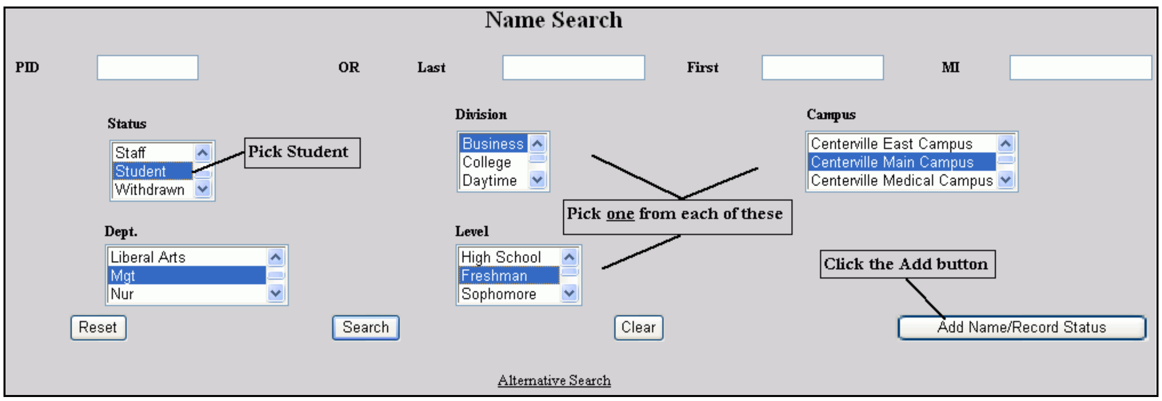
CHANGING OR ADDING THE STATUS OF STUDENT FOR AN APPLICANT

There are two ways to add Student (ST) status for an Applicant (AP).

- The automatic change when Generate Record Status is checked on (page 13) and the "Student?" checkbox is checked in Application Record, Figure 35 (page 28).
- The instructions below where you explicitly make the addition.

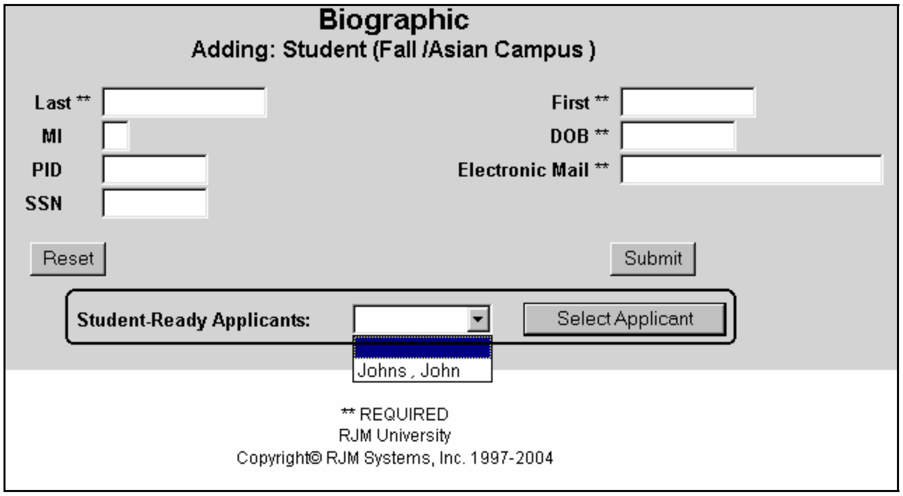
If you have no record of this person, see "Adding a New Applicant Status or a New Applicant" on page 14.

1. Select **Names** from Figure 1. You get Figure 68.



• Figure 68 Names Search Prompt

2. In the category boxes near the bottom of the display click Student, the division, the campus, and the department. Only one item in each "user type" will be selected. If you select more than one item, you receive an error message as illustrated in Figure 65.
3. Click the Submit button. This yields Figure 69.

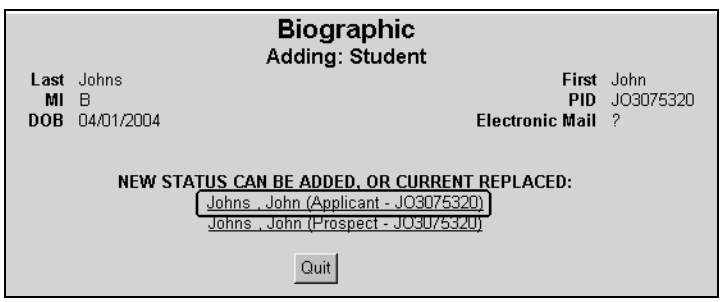


• Figure 69 Add Student Status Step 1

4. Click the pulldown by "Student-Ready Applicants" to get a list of those eligible for the new status.

   This is a list of those whose "Student?" checkboxes are checked[19]. If you don't see the person you expected in the list, check his or her Application Record, Figure 35 (page 28).

5. Click the name of the applicant whose status you want to add then click the "Select Applicant" button. This yields Figure 70.

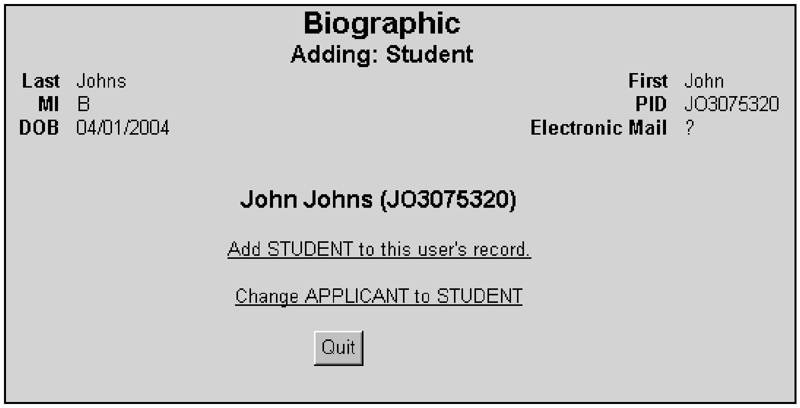


• Figure 70 Add-Applicant Status Choices

6. You know you got the right person in Figure 70 because the biographic information at the top is what you expected. If this is not the person you want, click the Quit button and start over.

7. In Figure 70, click the name of the person as applicant. That brings you to Figure 71.

[19] If the "Generate Record Status" for student is checked (Figure 15, page 13), the status is added without going through this process.



• Figure 71 Add or Change for Status of Student

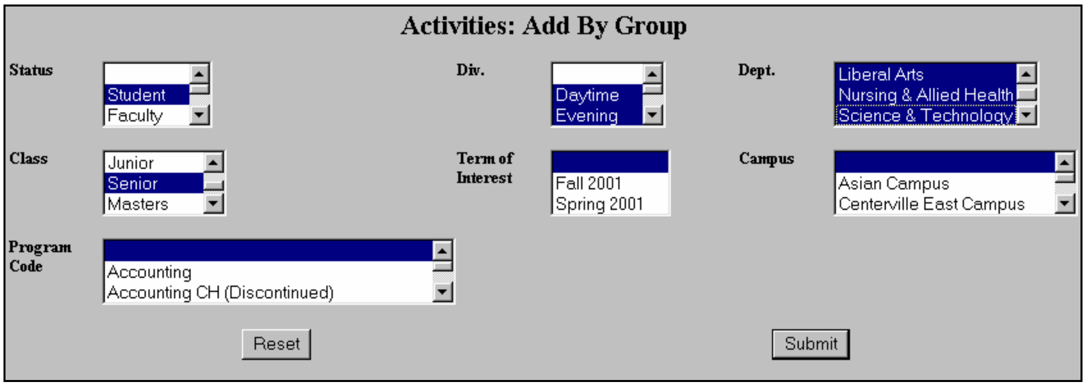
8. In Figure 71 you must make a choice. If your institution maintains applicant records for studies, click <u>Add STUDENT</u>. That preserves access[20] to specific applicant records like the checklist.

[20] Unless you intentionally delete records, SONISWEB® doesn't throw out any records. However, you can access certain records only from a specific status.

Adding Activities for a Group

This is for assigning one or more activities to a group of people rather than assigning them individually.

1. Select **Systems** from Figure 1 then click Activities: Add by Group in Figure 2. That yields Figure 72.

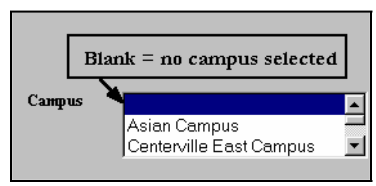


• Figure 72 Activities by Group

2. In Figure 72 define the group by selecting[21] those criteria that define the group.
3. To erase your selections and start over click the Reset button.
4. When you have selected the criteria, click the Submit button. You get Figure 75.

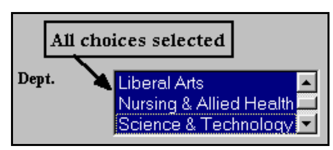
In selecting criteria, do this:

If a selection does not pertain to the group, select a blank entry. For example, if the group is not defined by a campus, select a "blank" campus as shown in Figure 73.



• Figure 73 "Blank" Selection

To pick all of the choices[21], click the top item, hold down the **Shift** key on your keyboard, scroll to the last selection, click it, then release the shift key. It will look like Figure 74.



• Figure 74 All Choices Selected

To pick more than one choice[21] from a list, click the first item, hold down the **Ctrl** key on your keyboard, scroll to the next item you want, click it, continue holding the **Ctrl**, scroll the next item, click it, etc. until you have selected the last item. When you release the **Ctrl** key, all your choices will have been selected.

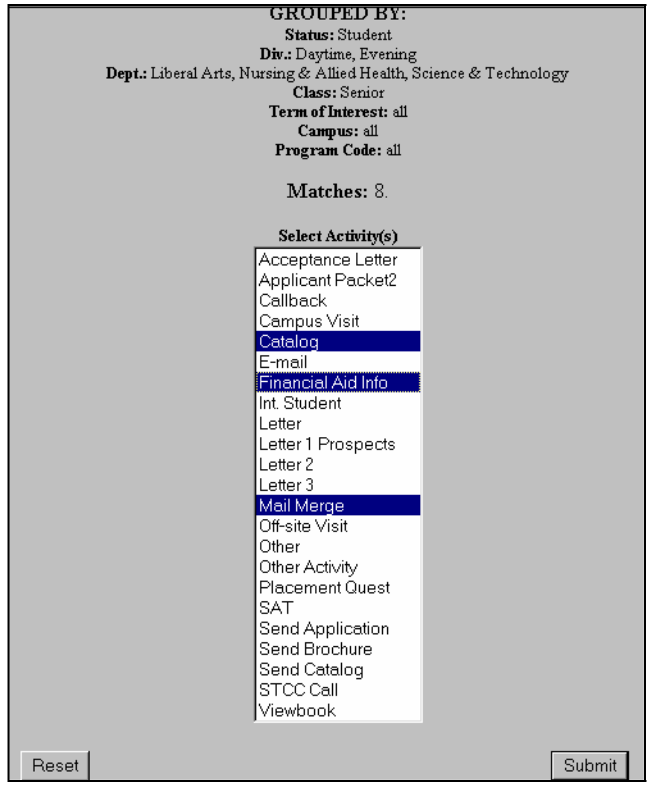
[21] For guidance in making multiple choices from a menu, see Figure 82 and the description on page 64.

5. In Figure 75 look first at the top. It confirms for you what you selected in Figure 72.

> If what you see at the top of Figure 75 is not what you intended, go to Figure 2 again and click Activities: Add by Group to start over.

6. Choose one or more activities to be assigned to the group using the multiple choice technique[21].

7. To erase your selections and start over, click the Reset button.



• Figure 75 Activity Selections for the Group

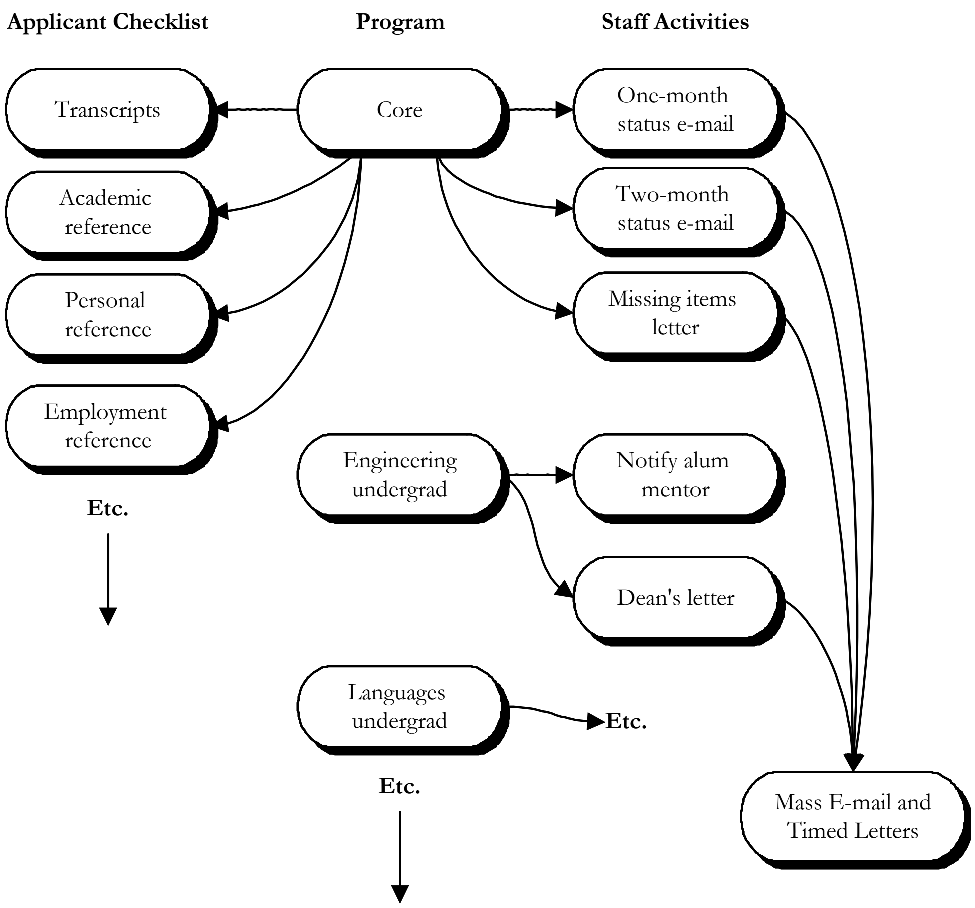
8. With your selections made, click the Submit button to have the activities assigned to the group you selected.

Applicant Records and Processes

Most applicant records are the same as everyone else's personal and professional records kept by SONISWEB®. These are described in the text "Students, Faculty, Applicant and Alumni/ae Record-keeping".

This text describes the records unique to applicants with emphasis on activities, checklists. and the processes in keeping those records.

Terms



• Figure 76 Activities and Checklists Defined

Activities are what you and your staff – not the applicant – do and are responsible for. You use activity reports (page 30) to track completion. Many activities are internal to your staff, so you usually do not want your applicants to see them on the Web. You can also produce mailings based on activities.

Checklists are what the applicant does and is responsible for. You want your applicants to see their checklists via the Web (see Figure 36 on page 29).

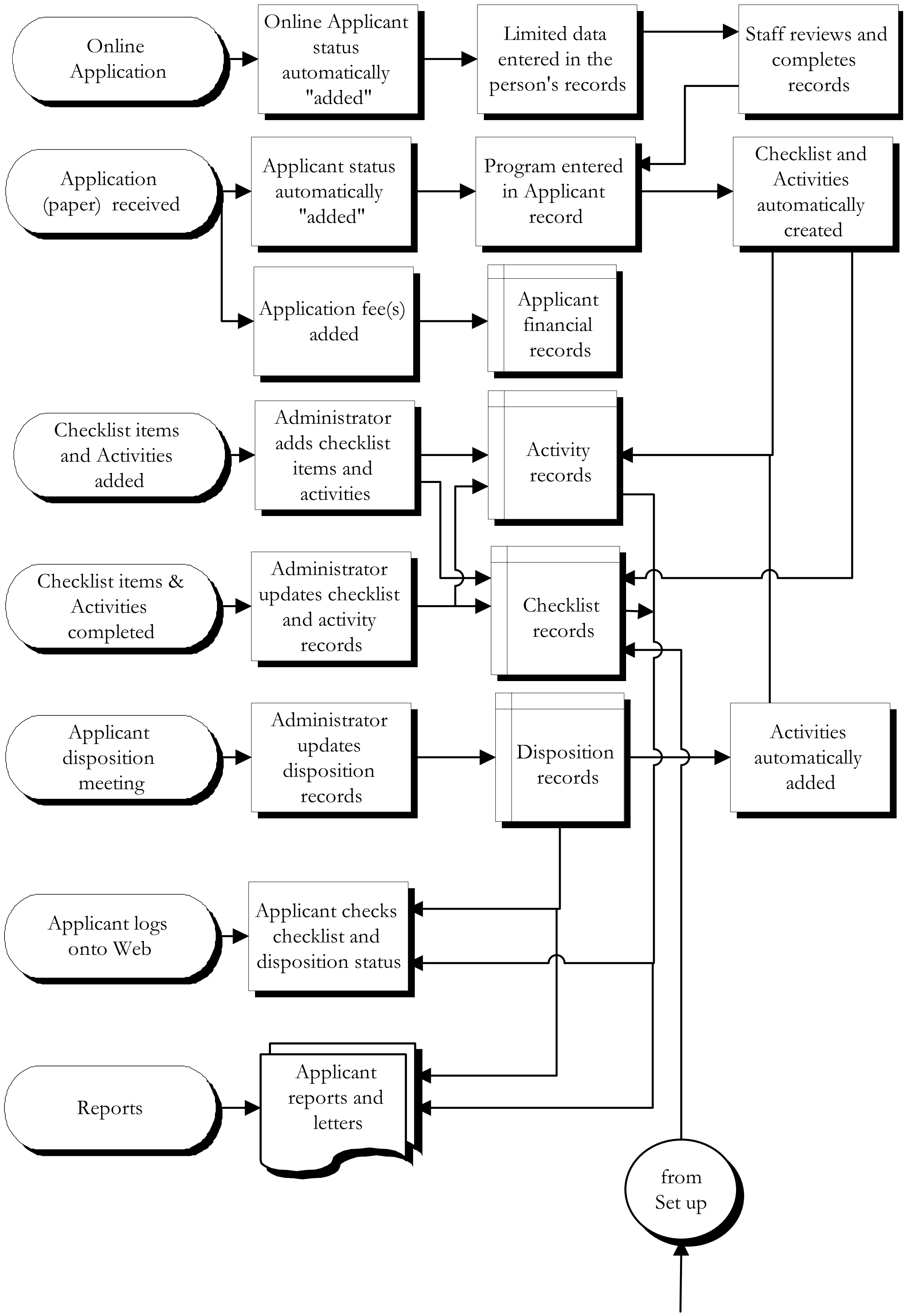
Disposition is a decision your institution makes – typically acceptance, rejection, or wait-list – then informs the applicant.

Processes

Once a prospective student sends you the application, he or she becomes an applicant. You mark that in her or his SONISWEB® Prospect Inquiry Details record. That action adds the new AP (Applicant) status to his or her database record.

A person who fills out an online application on your Web site bypasses this process. The person is added as an OA (Online Applicant).

The diagram in Figure 77 shows the relationships among the tasks common to applicant processing.



• Figure 77 Applicant Activity, Checklist, and Disposition Processes

Figure 77 contains the day-to-day functions. Figure 78 has the setup tasks you do whenever there is some change in your programs or requirements. Typically that is a yearly task.

Online Application entered by the prospective student directly from the Web adds the person and fills in parts of several records. As described on page 8, your staff still needs to check them and to trigger the checklist by filling out the Application record.

Application (paper) received can be an application from a prospective student or an application from someone otherwise unknown to you. In either case you add an Applicant record. In the case of a prospective student, this "add" is really a marking of the prospect's records as "Applicant". You then specify the program(s) the applicant is applying for. Once you have completed the process, the applicant will have a checklist of items that must be completed. SONISWEB® will also create a list of activities that your staff must complete.

Checklists and Activities are similar in content but differ in intent. See "Terms" on page 58 to understand their use and intent.

Application Fees, if you use them, are added. See "Filling in the Application and Creating a Checklist and an Activities List" on page 18.

Checklist items and Activities added allows you to add items that are not automatically created in the "Application received" process.

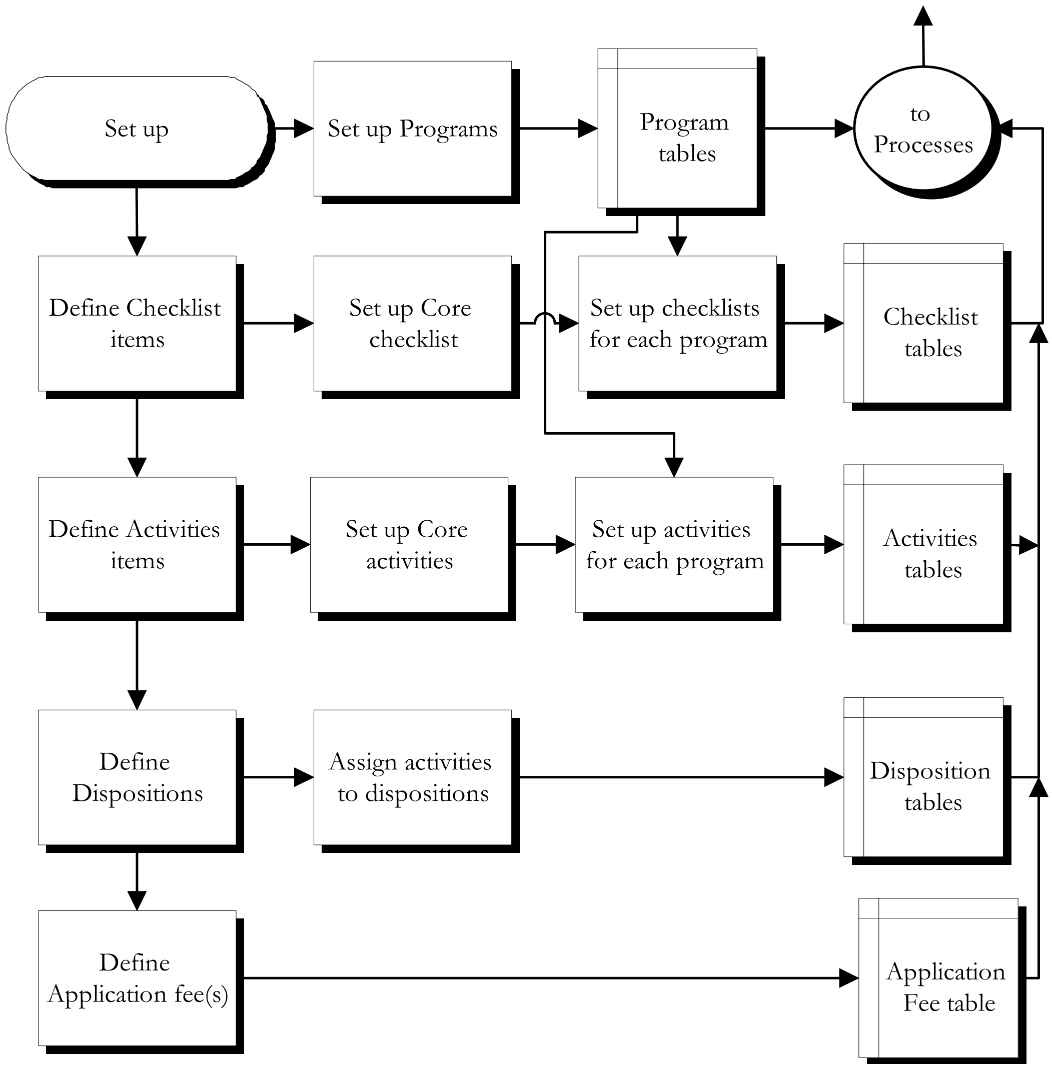
Checklist items & Activities completed covers the entry of transcripts, references, etc. and the check-off of the items in the checklist and the activity list.

Applicant disposition meeting is followed by entering the disposition in the applicant's record. A person can apply for more than one program, so he or she may have more than one program record. You mark the disposition for each program.

Applicant logs onto Web is something the applicant does if you assign[22] applicants IDs and PINs. Figure 36 (page 29) shows it. This reduces phone calls to your staff and gives your applicants convenient access. They can check the completion (your receipt and marking) of checklist items and their disposition.

Reports are printed reports and mailing lists for tracking activities and sending dispositions. There is no report for checklist since the applicant can examine his or her checklist at will via the Web.

[22] Online applicants get IDs and PINs automatically assigned.



• Figure 78 Set up Activities, Checklists, and Dispositions

Set up is the yearly process of adding or removing programs and setting up the applicant activities and checklists that attend those programs. These tables depend on each other, so setting them up in the order shown in Figure 78 is recommended.

GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTONS AND FIELDS

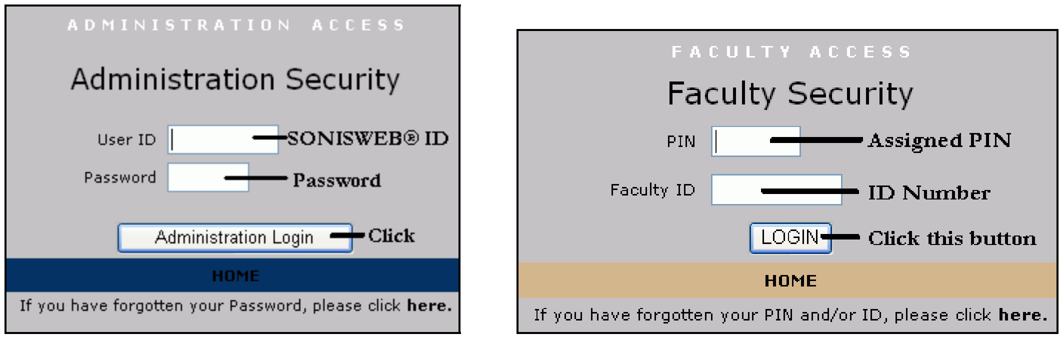
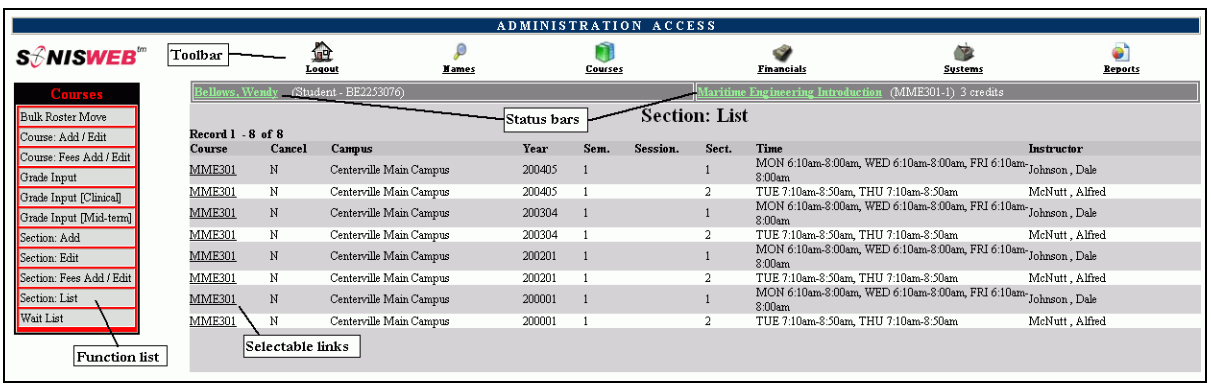


Figure 79 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 79.



• Figure 80 Typical SONISWEB® Page

Figure 80 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **<u>Courses</u>** in the toolbar and only <u>Course: Add/Edit</u> for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the "person" or the "course" you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **<u>Names</u>** or a course with **<u>Courses</u>**, there will be no **Status Bars** at the top.

In Figure 80 click an <u>underlined</u> **Selectable Link** and you go to that record.

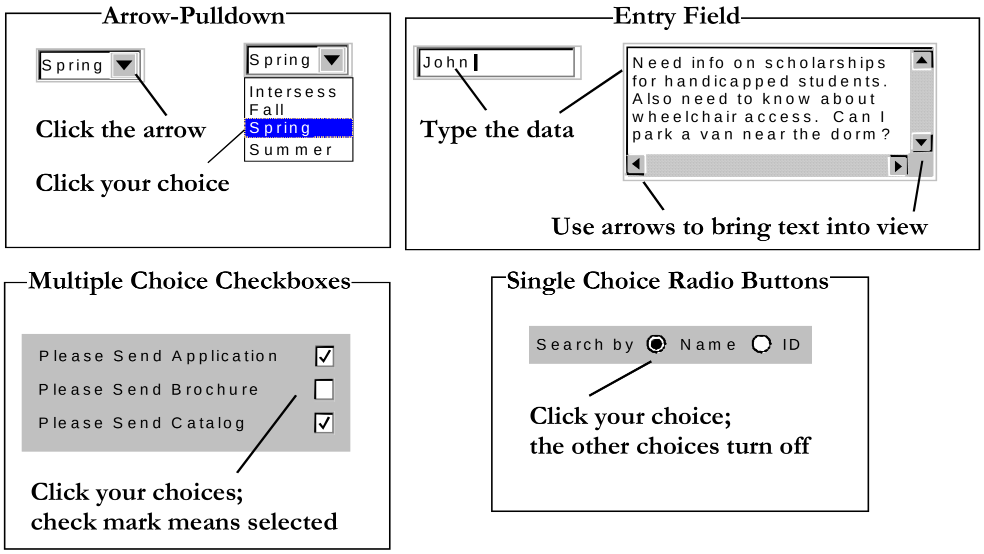


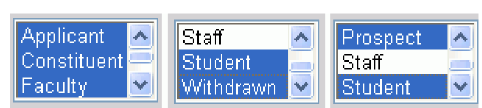
Figure 81 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 81. Use your mouse to click your selection.

- Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.
- For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.
- With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.
- Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 82.



• Figure 82 Selecting Multiple Choices

- To pick two or more that are <u>not</u> adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 82.