



Scholastic ONLINE Information System
for the Web

Importing Record Changes from the Web & Records from Other Systems

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This manual describes two of the import functions in SONISWEB®, importing records created or changed via the Web and importing user records from other systems.

Financial aid imports from EDEXpress or PowerFAIDS® are described in the “Financial Aids” manual. “SAT Importer” covers imports of scores from the College Board®.

This text starts with **navigating** the functions on page 3, then provides a **quick reference** on page 3. To see the **changes** in this edition look on page 2.

March 2006

Systems, Inc.

The logo for RJM Systems, Inc. It features the letters 'R', 'J', and 'M' in a stylized, blue, serif font, stacked vertically. To the right of the 'M' is the text 'Systems, Inc.' in a blue, italicized, serif font.

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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, page 3.
- Figure 17 Import Editing, page 17.
- Figure 18 Web Options, page 18.
- Figure 19 Biographic Options, page 19.

- Figure 23 Login Displays and Figure 24 Typical SONISWEB® Page, page 22.

NAVIGATING THE FUNCTIONS

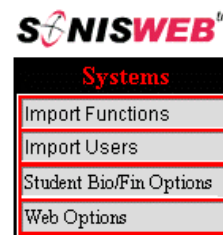


• Figure 1 Toolbar¹ for those with User-ID access

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.

The access rights of an administrative user are 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. One profile covers all the people in each staff category.
2. The **individual 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.



• Figure 2 Function Lists¹ - Partial

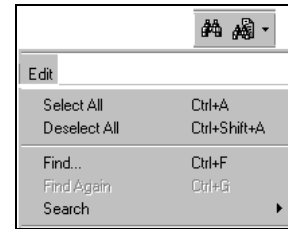
After clicking **Systems** in Figure 1 you get the selections shown in Figure 2.

WHAT DO YOU WANT TO DO?

- Cleaning up the Records - Dealing with Duplicates imported from another system, page 7.
- EDExpress record imports, see the manual "Financial Aid".
- Editing the changes imported from the Web,, page 17.
- Financial Aid imports, see the manual "Financial Aid".
- Getting Started - Log in and the use of Tabs, Button and Fields, page 22.
- Import Functions, importing from the Web, page 15.
- Import Student, Applicant, Faculty Records from another System, page 5.
- Import User Changes from the Web, page 15.
- Import Users, user data from another system, page 5.
- Making Changes via the Web, page 20.

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.

- PowerFAIDS® record imports, see the manual “Financial Aid”.
- Preparing the Import-Users File, page 10.
- Prospective Student Web Display, page 20.
- Student, Faculty, and Alumni/ae Web Displays, page 21.
- SAT scores importing, see the manual “SAT Importer”.
- Selecting Direct versus Import Record Changes, page 18.
- Selecting What Users can Change, page 19.
- 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 search² by word or phrase.



• 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 Explorer³ (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.

IMPORT STUDENT, APPLICANT, FACULTY RECORDS FROM ANOTHER SYSTEM

Importing changes that users made on their Web displays is covered in “Import User Changes from the Web” on page 15.

Before importing user records from another system, you must build a file in the specified format shown in Table 1 on page 11.

1. Prepare the file you’re importing into SONISWEB®. “Preparing the Import-Users File” on page 10 guides you in doing that.
2. Click **Systems** in Figure 1 then Import Users in Figure 2 to get Figure 4 or Figure 5.

If you don’t see Import Users in your function list, you may not be authorized to import. See your SONISWEB® administrator to check your authorization.

• Figure 4 Import Users File Prompt

[Reset Import Tables Before Running Parser](#) [View Duplicate Records](#)

• Figure 5 Import Users Choices for Existing File

3. You see Figure 4 if this the first time you’ve used Import Users. Enter the full file name or use the Browse button to find the file you prepared, then click the Submit button.
4. You see Figure 5 if data exists in the import tables from a prior import. Click the View link to see the prior duplicate records.
5. Click the Reset link in Figure 5 to replace the prior import tables with the new data you wish to import. You get Figure 6.

Import Users

The NAMEADD table has been dropped.
 The NAMEDUP table has been dropped.
 The NMMODSTADD table has been dropped.
 The ADDRESSADD table has been dropped.
 The ADDRESSDUP table has been dropped.
NAMEADD has been created.
NAMEDUP has been created.
NMMODSTADD has been created.
ADDRESSADD has been created.
ADDRESSDUP has been created.

Run Parser IF all five import tables have been created.

• Figure 6 Import Tables Reset

6. If no data existed in the above tables, the parsing begins automatically; otherwise, click Run Parser in Figure 6.

An E_MAIL (position 71-120) is required in row 133 (Landerford, Martha - LA8946950).
[Back](#)

• Figure 7 Example of an Import Parser Error

The parser⁴ first checks the length of each row in the text file. If any row is not of the proper length, the parser terminates with a message identifying the row and its length. The record (row) must be fixed in the original file before continuing.

7. Once all the records (rows) have been checked for length, the data used for duplication-checking are parsed out of the text file. If any of the following fields are blank, the parser will terminate and report what is missing in which row. Figure 7 is an example. You'll need to add the data before parsing can continue. The matching fields are:

- last_name
- first_name
- birthdate
- e_mail

8. Once all rows have been checked for those fields data, that data are checked against the Name and Address records in SONISWEB® to determine if there are any suspected duplicates.

If a suspected duplicate is found, a user ID is created and the data from your original text file are stored in the NAMEDUP and ADDRESSDUP tables.

If a duplicate is not found, a user ID is created and the data from the text file are stored in the NAMEADD and ADDRESSADD tables.

Import Users		
Import File Parser Results		
Records added to NAMEADD/ADDRESSADD (no duplicates): 3		
Records added to NAMEDUP/ADDRESSDUP (found in NAME): 217		
Records added to NAMEDUP/ADDRESSDUP (found in NAMEDUP): 0		
View Duplicate Records	View Additional Records	Add Additional Records

• Figure 8 Completion of Parsing

9. After the text file has been completely parsed a display like Figure 8 appears.

⁴ Parsing is the technical term for traversing data for validation and for extraction. A parser is the software logic that does the parsing.

Cleaning up the Records - Dealing with Duplicates

Records that are suspected as duplicates are stored in NAMEDUP and ADDRESSDUP. You need to decide what you're going to do with them.

1. Click [View Duplicate Records](#) in Figure 8 to see if the records are true duplicates or people with the same name, etc. The records that are true duplicates can be ignored.

Import Users						
Records Already In SONISWeb (3 records)						
Return						
Name	PID	E-Mail Address	Birthdate	City	State	SSN Dup.
Greco, Carol	GR8198167	cgreco@sonis.com	01/01/1950	Waterbury	CT	Y
Johnson, Dale	JO7636318	cgreco@sonis.com	10/31/1980	Waterbury	CT	N
Keefer, Daniel J.	KE7224379	?	07/01/1980	Durham	NC	Y
Return						

• Figure 9 View Suspected Duplicate Records

2. Use Figure 9 to check the records. Where SONISWEB® found a match between any of the columns in Figure 9 and the Name and Address records in your database, it puts that suspected duplication in Figure 9.

A “Y” in the column “SSN Dup.” means that SONISWEB® matched the social security number in your import file⁵ with the social security number (SSN) in an existing Biographic record.

3. Should you find some records in NAMEDUP and ADDRESSDUP that are not true duplicates, you must correct those records in the [original](#) file you created to import.

If you find some duplicates in Figure 8 and Figure 9, you don't have to correct them unless you want to import them.

4. With the records corrected in your original file, run the import process again (page 5).

⁵ You don't have to have a social security number in your original file (see Table 1, page 11), but if it's there, it will be checked.

Checking the Records to be Imported

1. After fixing the records in your original file and running the import process again, you should get Figure 10.

Import Users		
Import File Parser Results		
Records added to NAMEADD/ADDRESSADD (no duplicates): 217		
Records added to NAMEDUP/ADDRESSDUP (found in NAME): 0		
Records added to NAMEDUP/ADDRESSDUP (found in NAMEDUP): 0		
View Duplicate Records	View Additional Records	Add Additional Records

- Figure 10 "Clean" Import with no Suspected Duplications

If you find some duplicates in Figure 10 and Figure 9, you don't have to correct them unless you want to import them.

2. Now look at the records SONISWEB® intends to import to make sure they are what you expect. Click [View Additional Records](#) in Figure 10 to get Figure 11.

Records New To SONISWeb (3 records)						
Return						
Name	PID	Status	E-Mail Address	Birthdate	City	State
Bellows, Wendy	BE9666505	ST	bellows@myway.com	05/17/1978	Chapel Hill	NC
Landerford, Martha	LA7111519	FA	Landerford@myway.com	02/13/1987		
Oswald, Richard a.	OSS307834	ST	ro@brood.net	01/24/2002	a	AK
Return						

- Figure 11 New Record Display

3. If any of the records in Figure 11 are in error, note the error, correct the records in your original file, and run the import process again (page 5).

Continue this process of reviewing the records, making corrections to the original file, and importing again until what you see in Figure 11 is what you want to import.

Importing the Records into the SONISWEB® Database

1. Once you're satisfied that the records are correct, click [Add Additional Records](#) in Figure 8 or Figure 10 to get Figure 12.



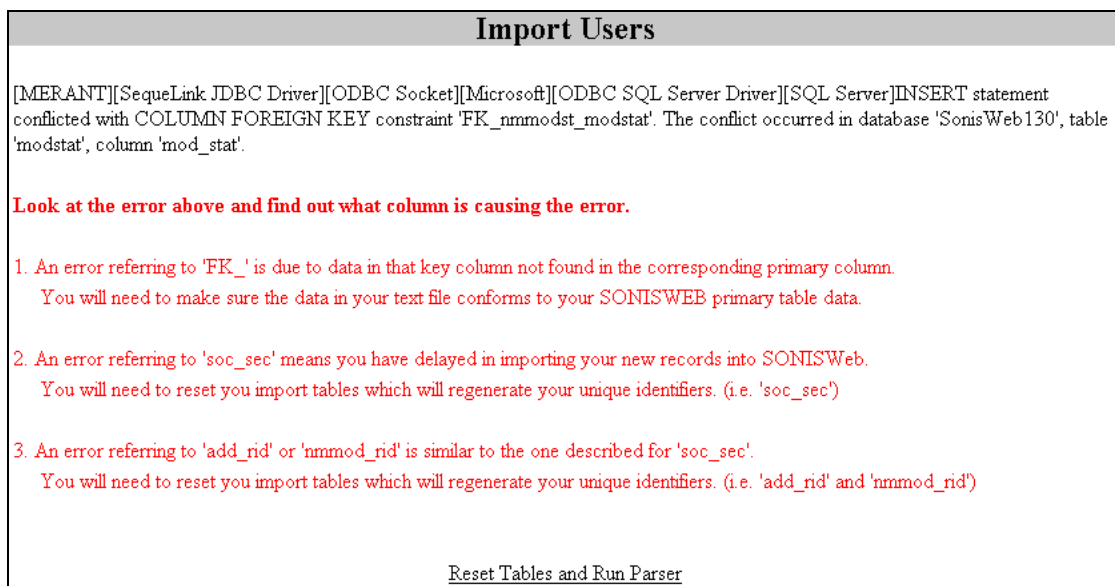
• Figure 12 Import Confirmation

2. Figure 12 confirms that the records were imported.

The records in NAMEDUP and ADDRESSDUP (Figure 9) are not added. Only those in NAMEADD and ADDRESSADD (Figure 11) are imported.

Import User Errors

Figure 13 illustrates import errors.



• Figure 13 Common Errors for Import Users

For example, if you specify a status code (mod_stat) of PR for prospect, there will be no match for it in the controlling primary key table so you'll get this error. (The correct code for a prospective student is PS.) The SONISWEB® manual “Messages, Errors and Diagnosis” has an extensive description on diagnosing and correcting FK-PK (foreign key - primary key) errors.

The term “soc_sec”⁶ in Figure 13 means the user ID.

⁶ Before the recent federal privacy rules on using the Social Security number as ID, most schools and SONISWEB® used it as the ID. Now SONISWEB® stores that number in a more private field, the “SSN” in the Biographic record. The field name “soc_sec” is left over from those earlier days.

Preparing the Import-Users File

SONISWEB® Import Users expects the file it's importing from to be laid out like Table 1 (page 11). Technically it's called a position-delimited file. Each field is in a specific position and is of a prescribed length in the file to be imported. Many database systems and spreadsheet programs allow "export mapping" to a position-delimited file. The Import Users function uses parsing⁴ to check for invalid data but it cannot detect all potential errors in the content or position of fields. To learn more about the column-fields in Table 1 and the layout of the SONISWEB® database tables, check these manuals:

- "Custom Fields, Web Pages, and Colors" (CustomWeb.pdf); it shows the headings as seen on displays, describes column-fields, and covers the settings of defaults. It also describes how to see and navigate the Data Dictionary display.
- "Mail, E-Mail Merge, and Mailing Labels" (MailE-MailMergeLabels.pdf); this manual includes the valid status (mod_stat) entries and describes many of the fields in Table 1 in greater details.
- "Messages, Errors and Diagnosis" (MessagesErrorsDiagnosis.pdf); the Primary-Key-Foreign-Key relationship and navigation of the database tables are covered.

These points are to be used in conjunction with Table 1 to setup the file you plan to import.

- Each row must have 695 characters.
- Each column must use the entire **LENGTH** defined for that column. If the value length is less than that specified, trailing spaces must be used.

The "last_name" field must be 30 characters long. The example of "Madison" is only 7 characters long, so in the text file it would be followed by 23 spaces (blanks).

- The **RANGE** refers to the position within the 695 character string. For example, "first_name" is located starting with the 31st character and ending with the 60th character.
- When a column is marked as having a **KEY**, it means that only specific values are allowed. Those values are the ones found in a **PRIMARY TABLE**. Any other value, including spaces (if they aren't the **DEFAULT** value) will result in the import stopping with an error.
- When a column has a **KEY** and **DEFAULT**, it is generally a value used when a value is **REQUIRED** but the specific data for that user is unknown. For example, the academic standing ("acadstat_cod") of the user is not known, so the **DEFAULT** "TBD" (To Be Determined) is used.
- If the **KEY DEFAULT** is listed as <blank>, it means spaces are allowed for that column because that value is in the **PRIMARY TABLE**. Otherwise <blanks> (spaces) are not allowable values.
- If the **KEY DEFAULT** is listed as <none>, it means there is no **DEFAULT**. However, a value is **REQUIRED**. For these columns, meaningful, specific data about the user are needed. For example, "mod_stat" refers to the status of the user (e.g., ST for student, FA for faculty, etc.) so a "TBD" would be meaningless. Therefore, a

specific value from the MODSTAT table would need to be used, like “AP” for Applicant.

- Some non-**KEY DEFAULT** values are listed as “0 or 1” because they must be either Yes=1 or No=0.
- **REQUIRED** means the column must have data. In most cases that data are determined by a **KEY**. However, “last_name”, “first_name”, “birthdate” (note the date format) and “e_mail” all require meaningful user data. These columns are used to determine if the user is already in SONISWEB®. Most duplicates can be caught this way. However, if the data are misspelled or an alternative first name (i.e. James in one place and Jim in another) is used, SONISWEB® will not find a match. This is why data should be checked before and after importation.

• Table 1 Data Field-Column Mapping to Import Users

Col. #	Col. Name	Description	Example	Range	Len.	Key	Primary Table	Default	Required
01	last_name	Last name	Madison	1-30	30				yes
02	first_name	First name	James	31-60	30				yes
03	birthdate	Birthdate	3/16/1751	61-70	10				yes
04	e_mail	Email address	Madi- son@yahoo. com	71-120	50				yes
05	acad- stat_cod	Academic standing	HONOR	121- 128	8	yes	ACADSTA T	TBD	yes
06	affilia- tion_cod			129- 130	2				no
07	camp_cod	Code for campus attending	SWCamp	131- 140	10	yes	CAMPUS	TBD	yes
08	citizen	Citizen of institu- tional country (Yes=1, No=0)	1	141	1			0 or 1	yes
09	deceased	Deceased (Yes=1, No=0)	0	142	1			0 or 1	yes
10	dec_date	Date of Death	11/13/2001	143- 152	10				no
11	dept_cod	Code of department enrolled in	LA	153- 156	4	yes	DEPT	TB	yes
12	disabled	Disabled (Yes=1, No=0)	0	157	1			0 or 1	yes
13	div_cod	Code of division enrolled in	D	158- 159	2	yes	DIVISION	T	yes
14	ethnic_cod	Code for ethnicity	C	160- 161	2	yes	ETHNIC	U	yes

Col. #	Col. Name	Description	Example	Range	Len.	Key	Primary Table	Default	Required
15	exam_id	Examination ID		162-170	9				no
16	excl_billin g			171	1			0 or 1	yes
17	excl_blk_t rans			172	1			0 or 1	yes
18	excl_maili ng			173	1			0 or 1	yes
19	fund_stat			174-175	2				no
20	gender	Code for gender	M	176	1	yes	GENDER	T	yes
21	iped_stat			177-178	2				no
22	level_	Code for level or class (Ex. Freshman = 1)	1	179	1	yes	LEVEL_	<none >	yes
23	maiden	Maiden Name	Washington	180-201	22				no
24	mar_cod	Code for marital status	S	202-203	2	yes	MARITAL	TB	yes
25	mi	Middle Initial	R	204	1				no
26	nickname	Name known by rather than given name	Shorty	205-224	20				no
27	notpub- name	Don't show person on name search		225	1			0 or 1	yes
28	nsrch_bloc k			226	1			0 or 1	yes
29	nsrch_bloc k_date			227-236	10				
30	online_hld	Hold preventing on-line registration (Yes=1, No=0)	0	237	1			0 or 1	yes
31	photo	Filename for photo	Madison.jpg	238-262	25				no
32	pin	Personal identification number (for login)	1f7aa	263-268	6				no
33	prefix	Prefix for name	Mr	269-288	20	yes	PREFIX	<blank >	yes

<u>Col. #</u>	<u>Col. Name</u>	<u>Description</u>	<u>Example</u>	<u>Range</u>	<u>Len.</u>	<u>Key</u>	<u>Primary Table</u>	<u>Default</u>	<u>Requ ired</u>
34	releas_dt			289-298	10				
35	releas_inf			299	1			0 or 1	yes
36	retries	Login retries		300-307	8				no
37	show_addr	Show address on name search		308	1			0	yes
38	show_email	Show email address on name search		309	1			0 or 1	yes
39	show_phone	Show home telephone no. on name search		310	1			0 or 1	yes
40	show_wkphn	Show work telephone no. on name search		311	1			0 or 1	yes
41	soc_sec ⁶	Personal identification (PID)	MA1111111	312-320	9			<system>	no
42	sonis_id	SONISWEB Identification number	MA1111111	321-329	9			<system>	no
43	ssn	Social security number	111231111	330-338	9				no
44	suffix	Suffix for name	Junior	339-358	20				no
45	tuit_stat	Code for tuition status	FT	359-360	2	no	TUITSTAT		no
46	veteran	Vereran (Yes=1, No=0)	1	361	1			0 or 1	yes
47	add_add2	Street address (third line)		362-396	35				no
48	add_addr	Street address (second line)	Apt. 13B	397-431	35				no
49	bad	Known bad address (Yes=1, No=0)	0	432	1			0 or 1	yes
50	cell_phone	Cell phone number	919-555-5555	433-447	15				no
51	city	City	Hollywood	448-482	35				no
52	country	Country	U.S.	483-507	25	yes	COUNTRY	<blank>	yes
53	county_cod	Code of county	Berryland	508-510	3	yes	COUNTY	<blank>	yes

<u>Col. #</u>	<u>Col. Name</u>	<u>Description</u>	<u>Example</u>	<u>Range</u>	<u>Len.</u>	<u>Key</u>	<u>Primary Table</u>	<u>Default</u>	<u>Re quired</u>
54	fax	Fax number	919-555-1111	511-525	15				no
55	IPED_addr			526	1				
56	phone	Home telephone number		527-541	15				no
57	preferred	Preferred address		542	1			1	yes
58	salutation			543-617	75				no
59	st_addr	Street Address (first line)	17 N. Willow St.	618-652	35				no
60	state	Code for state		653-654	2	yes	STATE	<blank >	yes
61	work_phone	Work telephone number		655-669	15				no
62	zip	Zipcode		670-670	10				no
63	labels			680	1			0 or 1	yes
64	labels2			681	1			0 or 1	yes
65	labels3			682	1			0 or 1	yes
66	type	Code for address type	Primary	683-692	10	yes	ADDRTYPE	Primary	yes
67	mod_stat	Code for status (i.e. student, faculty, etc.)	ST	693-694	2	yes	MODSTAT	<none >	yes
68	<CR/LF>	Carriage return/Line feed		695	1			<CR/LF>	yes

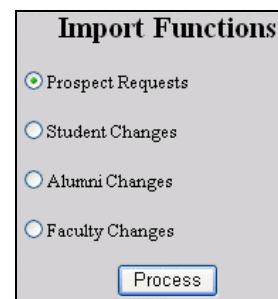
IMPORT USER CHANGES FROM THE WEB

Importing records from another system is covered on page 5.

This importation covers two situations:

Import inquiries from prospective students. Using the SONISWEB® inquiry display (Figure 20), prospective students (prospects) enter information into a holding file. When you import the holding file, you examine the records, remove those that look like someone playing with your Web site and change (edit) them before allowing those records into the SONISWEB® database.

Import changes made by current users. Student, faculty or alums can change their biographic information. You can choose whether or not to let them change their records directly (see “Imported versus Direct Change to Record”, page 18). If you don’t permit them to change their records directly, you import their changes just as you do prospect entries.



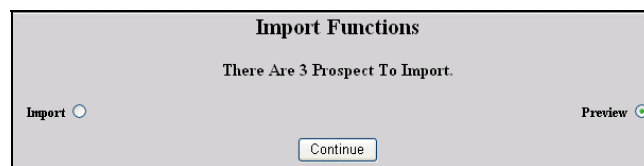
• Figure 14 Import Options

1. Click **Systems** in Figure 1 then **Import Functions** in Figure 2 to get Figure 14.

If you don’t see **Import Functions** in your function list, you may not be authorized to import. See your SONISWEB® administrator to check your authorization.

2. Pick the information you wish to import by clicking one of the radio buttons⁷ in Figure 14.
3. This yields an import display like that shown in Figure 15. The word “Prospect” in the display is replaced with “Student”, “Faculty”, etc., depending on the choice you made in Figure 14.
4. Your choices are:

- Preview by clicking the “Preview” radio button⁷ then the Continue button. You get Figure 16.



• Figure 15 Import Functions

- Import records without looking at them by clicking the Import radio button⁷ then the Continue button. This may be appropriate for Faculty and “Alums” but not the less orderly Prospect records.

⁷ See Figure 25 “Arrows, Fields, Checkboxes and Buttons” on page 23.

If you find you normally import Faculty, Student or Alumni/ae records without pre-viewing them, you can eliminate this step by allowing direct input as described in “Imported versus Direct Change to Record”, page 18.

Import Functions

Prospect Records To Import							
Name	Street Address	City	State	Phone	Email	Import	Delete
<input type="radio"/> Black, Jackson (BL4219302)		dsfdsfa	AR	21434324231	Me@go.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> Emmons, Maureen (EM7552883)	40 Essex Ln	Woodbury	CT		memmons@sonis.com	Duplicate	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> Wilson, Woodrow W (WI8649634)	9 E Columbus	Staunton	VA	740-1-555-1212	wwilson251@valleymail.net	<input type="checkbox"/>	<input type="checkbox"/>

Choose a NAME to edit OR check those NAMES you wish to IMPORT and/or DELETE.

• Figure 16 Import Record Selection

5. In Figure 16 you have these choices:

- Delete the entry by clicking the Delete check boxes⁷ then the Continue button. This is very useful for prospect imports. Some Internet users like to enter silly data into Web sites. You can start by deleting all the useless entries.
- Edit one or more entries to correct them.
 Wilson, Woodrow W (WI8649634)
 Click the radio button⁷ by a name then click the Continue button. You get Figure 17 where you edit the record before importing it. Typically you edit all the records that need editing before importing any records. See “Editing the Imported Data” below for the editing process.

<input type="radio"/> Wilson, Woodrow W (WI8649634)	9 E Columbus	Staunton	VA	740-1-555-1212	wwilson251@valleymail.net	<input checked="" type="checkbox"/>	<input type="checkbox"/>
---	--------------	----------	----	----------------	---------------------------	-------------------------------------	--------------------------

- Import the records by clicking the Import check boxes⁷ then the Continue button. That updates the SONISWEB® database records for these people. For prospective students it creates a new set of records.

If you know you need to change a record but do not yet have all the information needed, you can leave the record in the import list by clicking neither the Delete nor Import checkbox for that person. It'll stay in the hold file until you're ready for it.

Editing the Imported Data

Import Functions

Prospect

PID	WI8649634	Electronic Mail	wwilson251@valleymail.net		
Last	Wilson	First	Woodrow	MI	W
Street Address	9 E Columbus				
City	Staunton	State	Virginia	Zipcode	26701
Country	U.S.A.	Telephone	740-1-555-1212		
Term of Interest	Fall 2006	Enroll Status	FULL TIME	Referred by	Alum High School Counselor
Program Code	Accounting Accounting CH (Discontinued) Agricultural Science				
	Campus	Comments			

Please Send Application
 Please Send Brochure
 Please Send Catalog

• Figure 17 Import Editing

As shown in Figure 17 all the possible fields that the person could have entered are displayed. Enter the changes in the fields then click the Continue button.

You are returned to Figure 16. There you can select another record to edit. When you have finished editing (and deleting unwanted records), click the Import check boxes for all the records then click Continue to have them imported.

IMPORTED VERSUS DIRECT CHANGE TO RECORDS

All prospect data enters the import file and must be imported as described in “Import User Changes from the Web” on page 15.

With Students, Faculty, and Alumni/ae, you have a choice. You can decide:

- Whether a category of persons can update records directly or whether changes go to an import file for checking as described in “Selecting Direct versus Import Record Changes” below.
- What data Students and Alumni/ae can change via the Web. (Faculty always have the ability to see and change their data.)

The Online Application is the exception. Rather than fill in an inquiry (Figure 20), a person enters an application for admission online. That makes them an Applicant from the start and bypasses all the prospective student, the importing, and the recruiting steps.

Selecting Direct versus Import Record Changes

1. Click **Systems** from Figure 1 then click **Web Options** in Figure 2.
2. Web Options is a large display. In it are the check boxes⁷ shown in Figure 18. Click the box for each category you want to have direct update authority.



Allow Direct Biographic Information Updates for:			
Alumni:	<input checked="" type="checkbox"/>	Faculty:	<input checked="" type="checkbox"/>
		Students:	<input checked="" type="checkbox"/>

• Figure 18 Web Options

A check mark means that category of persons can change her or his records directly; the import function will not be used. No check mark (blank box) means that any changes authorized in “Selecting What Users can Change” below will not enter the database until a SONISWEB® administrator has imported the updates.

3. Click the Submit button at the top or bottom of the Web Options display.

To find your way to the fields in Figure 18 quickly, use the Find function in your browser (hold the **Ctrl** key then press the **F** key) and enter the word “allow” to jump to this field.

Selecting What Users can Change

As shown in Figure 19, you can determine what a student or an “alum” can see (or not) and what that person can edit. To set this option:

1. Click **Systems** from Figure 1 then click Student Bio/Fin Options in Figure 2.
2. Click the check boxes⁷ to control what a person can see (Display) and what she or he can change (Edit).
3. Click the Submit button for the changes to take effect.

Student Bio/Fin Options		
(Alumni)		
Address	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
Email	Display: <input checked="" type="checkbox"/>	Edit: <input type="checkbox"/>
Name	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
Phone	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
PIN	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
(Students)		
Address	Display: <input type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
Email	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
Name	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
NSLCH	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
Phone	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
PIN	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
Billing	Disable: <input type="checkbox"/>	
Ledger	Disable: <input type="checkbox"/>	
<input type="button" value="Submit Options"/>		

• Figure 19 Biographic Options

The choices with Edit checked will appear with boxes surrounding them as shown in Figure 21. Those without an Edit check will appear as plain text. Those with neither box checked will not appear on the display.

MAKING CHANGES VIA THE WEB

This illustrates what SONISWEB® looks like to users as they enter changes to their data.

Prospective Student Web Display

This figure shows a typical Web form⁸ for prospective students to enter information and request brochures, etc. The record is placed in the import file where you examine it, imported it, or deleted it as described in “Import User Changes from the Web”, page 15.

After import, the name, address, prospect detail and activity records are created for the prospect.

See the SONISWEB® manuals “Recruiting Prospective Students” for the use of the fields in Figure 20 and “Student, Faculty, Applicant, and Alumni/ae Record-keeping” for details on the records kept for each person.

• Figure 20 Prospective Student Inquiry Web Form

⁸ Your school may change your form in which case it will look different from the standard SONISWEB® example.

Student, Faculty, and Alumni/ae Web Displays



Figure 21 shows a typical Web page for Students, Faculty and “Alums”. The person clicks the Update Bio icon at the top of the display to get this view.

The fields surrounded by boxes can be changed by the user from this Web page.

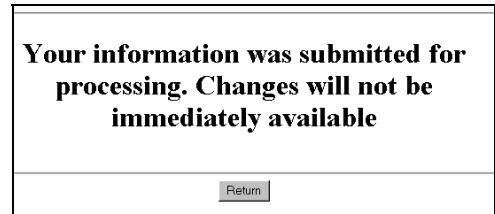
The fields not surrounded by a box cannot be changed.

Some fields aren’t even shown because of the settings in Figure 19.

These are chosen as described in “Imported versus Direct Change to Record” above.

Where the setting for direct update is off (see “Selecting Direct versus Import Record Changes”, page 18), the person receives this display.

• Figure 21 Student, Faculty & Alum Web Display



• Figure 22 Delay of Change Message

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

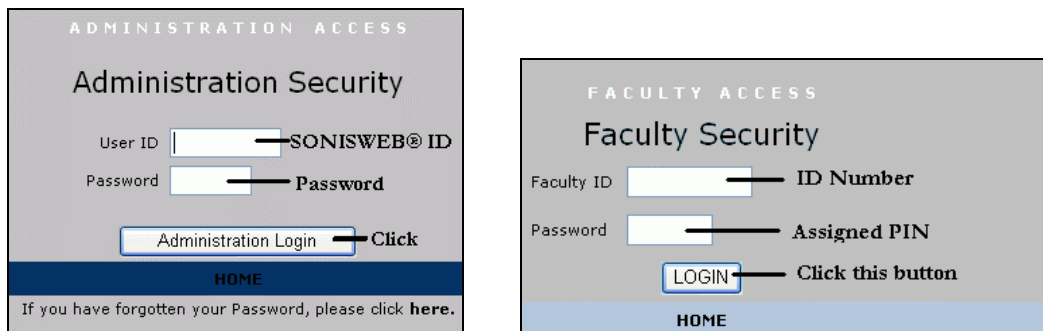
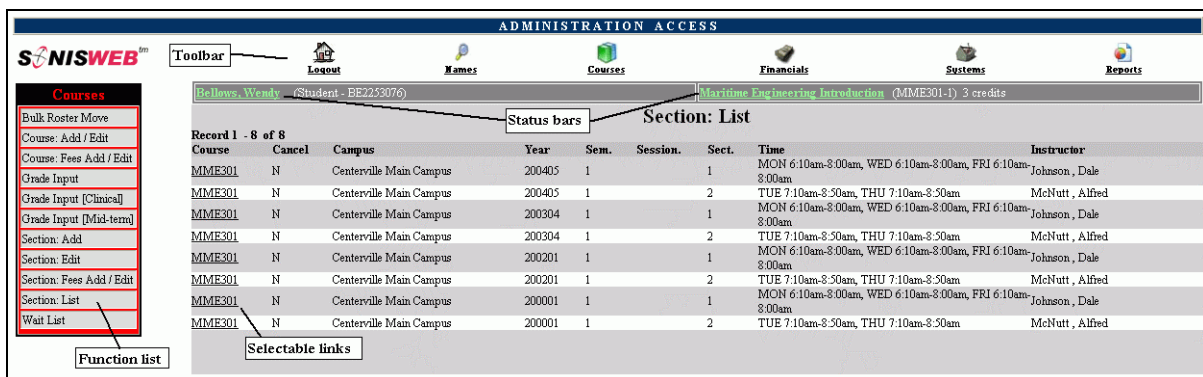


Figure 23 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 23.



• Figure 24 Typical SONISWEB® Page

Figure 24 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 **Courses** in the toolbar and only **Course: Add/Edit** 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 **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 24 click an underlined **Selectable Link** and you go to that record.

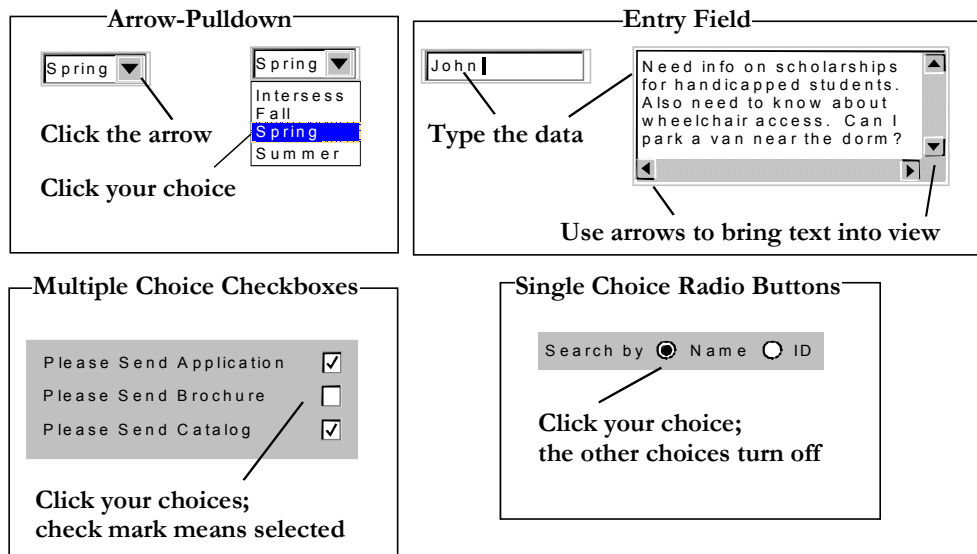


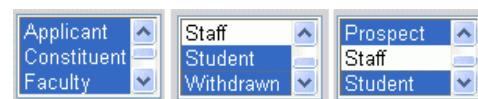
Figure 25 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 25. 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 26.



● Figure 26 Selecting Multiple Choices

To pick two or more that are not 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 26.