



Scholastic ONLINE Information System
for the Web

Importing Record Changes from the Web

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This text describes importing records created or changed via the Web. With this process prospective students can enter names, addresses, and request the literature they need. Your staff imports and edits the information before it goes to the SONISWEB® databases. If you have not authorized your students, faculty or alumni/ae to directly change their addresses and other biographic data, you can allow them to make changes that go to an import holding file which you then import just as with prospects. The processes described are normally done by the Registrar, Recruiting, Admissions and Alumni/ae relations staffs.

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.

April 2004

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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(ImportFromWeb.doc - 04/16/04 09:35)

NEW IN THIS EDITION

- All of the displays are new for SONISWEB® Version 1.3.
- Some of the text is changed to match the updated displays.

NAVIGATING THE FUNCTIONS

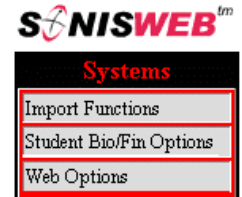


• Figure 1 Toolbar¹ for those with User-ID access

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 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. 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

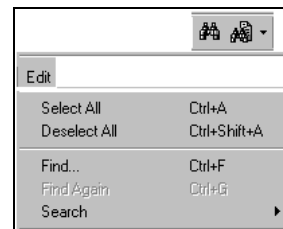
After clicking **Systems** in Figure 1 you get the selections shown in Figure 2.

WHAT DO YOU WANT TO DO?

- Editing the Imported Data on page 7.
- Getting Started - Log in and the use of Tabs, Button and Fields on page 11.
- Import Functions, page 5.
- Making Changes via the Web, page 9.
- Prospective Student Web Display, page 9.
- Prospective Student, Student, Faculty and Alumni/ae Web Displays, page 10.
- Selecting Direct versus Import Record Changes, page 8.
- Selecting What Users can Change, page 8.

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.

- 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 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 Explorer³ (IE), Netscape®, and Opera Web browsers have an “autocomplete” 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.

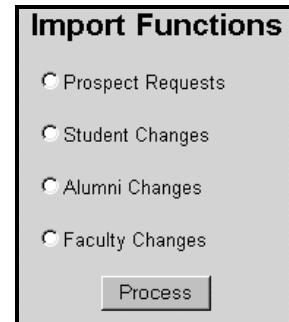
² If you're unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text “Index to Texts”.

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

IMPORT FUNCTIONS

Using the SONISWEB® inquiry display (Figure 10), 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.

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 8). If you don’t permit them to change their records directly, you import their changes just as you do prospect entries.



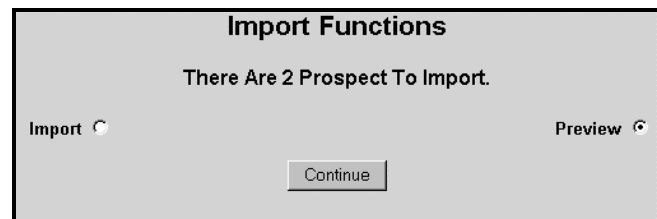
• Figure 4 Import Options

1. Click **Systems** in Figure 1 then **Import Functions** in Figure 2 to get Figure 4.

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 buttons⁴ in Figure 4.
3. This yields an import display like that shown in Figure 5. The word “Prospect” in the display is replaced with “Student”, “Faculty”, etc., depending on the choice you made in Figure 4.
4. Your choices are:

- Preview by clicking the “Preview” radio button⁴ then the Continue button. You get Figure 6.



• Figure 5 Import Functions

- You can choose to import records without looking at them by clicking the Import radio button⁴ then the Continue button. This may be appropriate for Faculty and “Alums” but not the less orderly Prospect records.

If you find you normally import Faculty, Student or Alumni/ae records without previewing them, you can eliminate this step by allowing direct input as described in “Imported versus Direct Change to Record”, page 8.

⁴ See “Figure 16” on page 12.

Import Functions

Prospect Records To Import

Name	Street Address	City	State	Phone	Email	Import	Delete
<input type="radio"/> , (5827913)						<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/> LaJoie , Kathryn A (LA8480795)	102 Main Street	Scarborough	ME	216-555-1212	kala@seme.net	<input type="checkbox"/>	<input type="checkbox"/>

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

• Figure 6 Import Record Selection

5. In Figure 6 you have these choices:

- Delete the entry by clicking the Delete check boxes⁴ 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. Click the radio button⁴ by a name then click the Continue button. You get Figure 7 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.

LaJoie , Kathryn A (LA8480795)

<input checked="" type="radio"/> LaJoie , Kathryn A (LA8480795)	102 Main Street	Scarborough	ME	216-555-1212	kala@seme.net	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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- Import the records by clicking the Import check boxes⁴ 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 check-box for that person. It'll stay in the hold file until you're ready for it.

Editing the Imported Data

Import Functions
Prospect Inquiry ID : LA8480795

Last	<input type="text" value="LaJoie"/>		
First	<input type="text" value="Kathryn"/>	MI	<input type="text" value="A"/>
Street Address	<input type="text" value="102 Main Street"/> <input type="text"/> <input type="text"/>		
Locality	<input type="text" value="Scarborough"/>	State	<input type="text" value="Maine"/>
Zipcode	<input type="text" value="00123"/>	Country	<input type="text" value="U.S.A."/>
Telephone	<input type="text" value="216-555-1212"/>	Electronic Mail	<input type="text" value="kala@seme.net"/>
Term of Interest	<input type="text"/>	Enroll Status	<input type="text" value="FULL TIME"/>
Referred by	<input type="text" value="Internet Web Page
Newspaper"/>		
Program Code	<input type="text" value="Accounting
Accounting CH (Discontinued)"/>		
Comments	<input type="text" value="Can I transfer credits from the
Merchant Marine Academy?"/>		
Please Send Application:	<input checked="" type="checkbox"/>		
Please Send Brochure:	<input checked="" type="checkbox"/>		
Please Send Catalog:	<input checked="" type="checkbox"/>		
<input type="button" value="Continue"/>			

• Figure 7 Import Editing

As shown in Figure 7 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 6. 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 Functions” above.

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 “Import Functions” above.
- 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 10), 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 boxes⁴ shown in Figure 8. Click the box for each category you want to have **direct** update authority.



Allow Direct Biographic Information Updates for:
 Alumni: Faculty: Students:

• Figure 8 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.

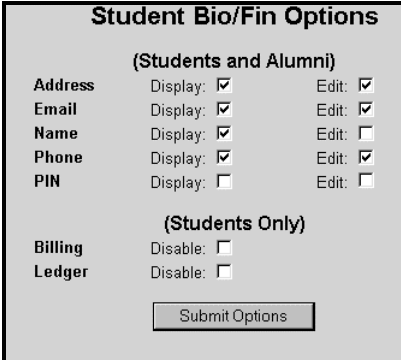
3. Click the Submit button at the bottom of the Web Options display.

To find your way to the fields in Figure 8 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 9, 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 boxes⁴ 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

(Students and Alumni)

Address	Display: <input checked="" 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 type="checkbox"/>
Phone	Display: <input checked="" type="checkbox"/>	Edit: <input checked="" type="checkbox"/>
PIN	Display: <input type="checkbox"/>	Edit: <input type="checkbox"/>

(Students Only)

Billing	Disable: <input type="checkbox"/>
Ledger	Disable: <input type="checkbox"/>

• Figure 9 Biographic Options

The choices with Edit checked will appear

with boxes surrounding them as shown in Figure 11. 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 form⁵ 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 Functions”, page 5.

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 10 and “Student, Faculty, Applicant, and Alumni/ae Record-keeping” for details on the records kept for each person.

The screenshot shows a web form for RJM University. The header includes the university name and navigation links for 'directories', 'search', and 'employment'. The main title is 'Information' with a date of '03/05/2004'. The form contains several input fields: Last name (Hanitia), First name (Junghan), MI (2), Street Address (3412 N. Madison), Street Address (Route 134), Street Cont., City (Bumpass), State (Virginia), Zipcode (23123), Country (USA), Telephone (804-555-1212), and Electronic Mail (jungh@rcnmail.net). There are also dropdown menus for 'Term of Interest' (Fall 2005) and 'Enroll. Intent' (FULL TIME). A 'Referred by' dropdown is set to 'InternetWeb Page'. A list of programs is shown, with 'Basic Seamanship' selected. At the bottom, there are three checked checkboxes: 'Please Send Application', 'Please Send Brochure', and 'Please Send Catalog'. The form concludes with 'RESET', 'SUBMIT', and 'HOME' buttons.

• Figure 10 Prospective Student Inquiry Web Form

⁵ Your school may change your form in which case it will look different from the standard SONISWEB® example.

Prospective Student, Student, Faculty and Alumni/ae Web Displays

Figure 11 shows a typical Web page for Students, Faculty and “Alums”. The person clicks the Update Bio tab 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 – the PIN in this case – aren’t even shown because of the settings in Figure 9.

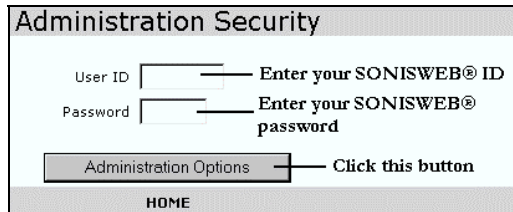
These are chosen as described in “Imported versus Direct Change to Record” above.

Where the setting for direct update is off (see “Selecting Direct versus Import Record Changes”, page 8), the person receives this display.

• Figure 11 Student, Faculty & Alum Web Display

• Figure 12 Delay of Change Message

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



Administration Security

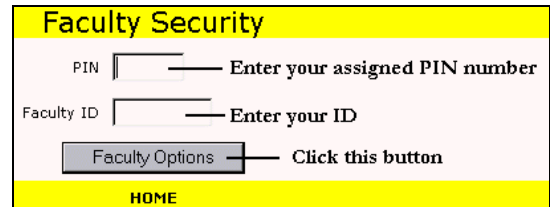
User ID Enter your SONISWEB® ID

Password Enter your SONISWEB® password

Click this button

HOME

• Figure 13 Administrator login



Faculty Security

PIN Enter your assigned PIN number

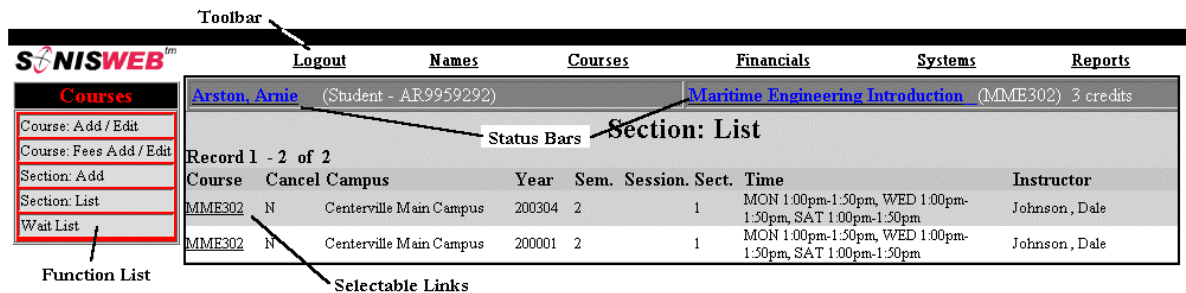
Faculty ID Enter your ID

Click this button

HOME

• Figure 14 Student and other login

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 13 or Figure 14.



Toolbar

SONISWEB™ Logout Names Courses Financials Systems Reports

Arston, Arnie (Student - AR9959292) Maritime Engineering Introduction (MME302) 3 credits

Course: Add / Edit

Course: Fees Add / Edit

Section: Add

Section: List

Wait List

Function List

Status Bars

Section: List

Record 1 - 2 of 2

Course	Cancel	Campus	Year	Sem.	Session	Sect. Time	Instructor
MME302	N	Centerville Main Campus	200304	2	1	MON 1:00pm-1:50pm, WED 1:00pm-1:50pm, SAT 1:00pm-1:50pm	Johnson, Dale
MME302	N	Centerville Main Campus	200001	2	1	MON 1:00pm-1:50pm, WED 1:00pm-1:30pm, SAT 1:00pm-1:50pm	Johnson, Dale

Selectable Links

• Figure 15 Typical SONISWEB® Page

Figure 15 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 15 click an underlined **Selectable Link** and you go to that record.

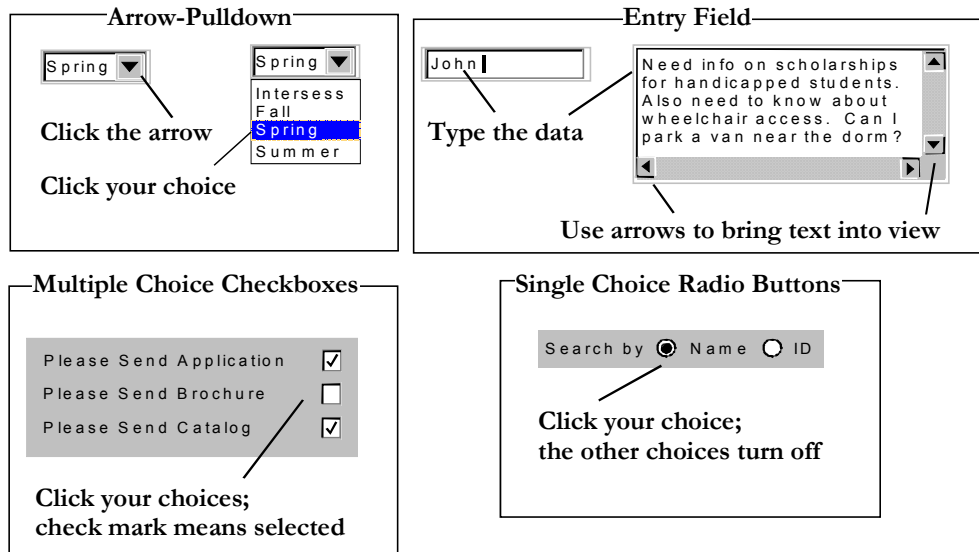


Figure 16 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 16. 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 17.



• Figure 17 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 17.