SONISWEB®

Scholastic ONline Information System for the Web

Recruiting Prospective Students

Once you set up your recruiting plans and the activities you want in each plan, SONISWEB® automatically adds them to your prospective students' records. That is shown visually on page 33. Activity reports let you track the progress against the plan. Timed mail and E-mail can drive correspondence. Mail-merge lists can be built for labels, e-mail notes, or letters to send to your prospective students. A term-of-interest report assists you in estimating the size of incoming classes. This text explains how to use these functions.

This text starts with **navigating** the functions on page 5, then provides a **quick reference** on page 7. To see the **changes** in this edition look on page 4.

When a prospective student uses an **Online Application** (page 59) instead of a Web inquiry (page 8) the entire recruiting process is bypassed.

March 2006

RJM Systems, Inc.

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(RecruitingProspectiveStudents.doc - 03/20/06 4:34 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 and Figure 2 Function Lists1 - Partial, page 5.
- Figure 72 Login Displays and Figure 73 Typical SONISWEB® Page, page 57.
- 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.
- "Prospect Details Record", page 14.
- "Prospect Inquiry Extra", page 15.
- "Reports With "RB" and Reports Without", page 19.
- "Report Navigation", page 20.
- "Query Builder with E-Mail", page 23.
- Most reports, pages 24 through 27.
- "Setting up Activities", page 35.
- "Referred By", page 52.
- "Term of Interest", page 54.
- "Adding Activities for a Group", page 55.

• 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.

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.

• Figure 2 Function Lists[1] - Partial

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.

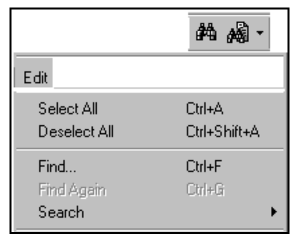
In Figure 1 click **Names** to select a person and get Figure 2, left, **Reports** to get Figure 2, middle, or **Systems** to get Figure 2, right.

[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.

WHAT DO YOU WANT TO DO?

This text is organized with the most frequently used functions in the front and the least used – like setup – at the back.

- On-line Program list, page 9.
- Prospect Details Record, page 14.
- Prospective Students Report, page 26.
- Prospects by Type Report, page 27.
- Recruiting Plans Defined, page 33.
- Referred By Table, page 52.
- Removing old prospect records, page 30.
- Setting up Activities, page 35.
- Setting up the Recruiting Plan Tables, page 35.
- Substituting Categories, page 42.
- Term of Interest Table, page 54.
- 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.

ONLINE APPLICATION

It's shown on page 59 and is designed for you to remove, copy, and give to anyone guiding the application process.

When a person's first encounter with your institution is via an on-line application (page 59), that person never becomes a prospective student. That means the data collected in the Prospect Inquiry Details record on page 14 is never filled out.

[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.

NEW PROSPECT RECORD FROM THE WEB

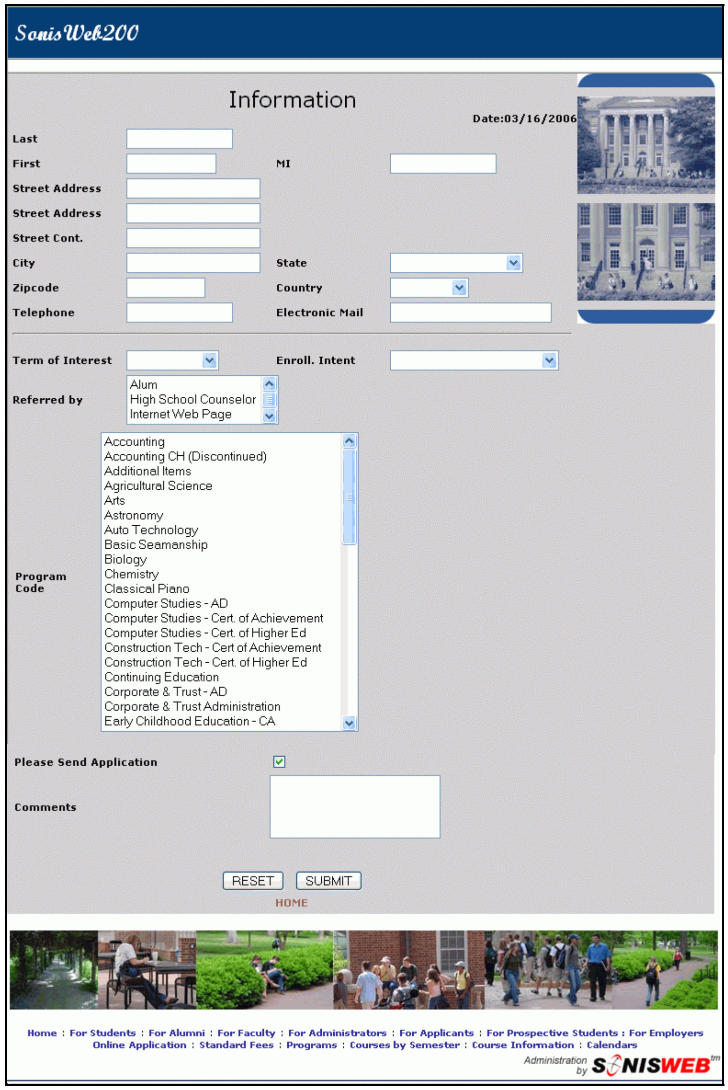
A prospective student with access to your Web site has two choices:

1. Fill out a form like Figure 4. That goes into a holding file. An authorized person on your staff imports that record into SONISWEB®. That process is explained in “Importing Inquiries” on page 31.

   After importing, the next step is “Entering Prospect Details and Building a Recruiting Plan” on page 14.

   OR

2. Fill out an online application as shown on page 59. If the online application is chosen, the person bypasses this recruiting process.



• Figure 4 Prospective Student Inquiry Form[4]

[4] Your school may have a custom form that looks different from this example.

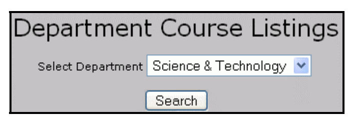
USING ON-LINE CATALOG AND PROGRAMS ACCESS

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

• Figure 5 Initial SONISWEB® Display

Clicking one of the circled choices in Figure 5 yields a display like Figure 8. (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 6.



• Figure 6 Department Selection

Where you choose Courses by Semester, you get a prompt to pick the School Year and Semester (Term) as shown in Figure 7.

• Figure 7 Semester (Course Section) Choice

Course Listing
for Science & Technology Department

Course		Credits	Detail
ANAT101	Anatomy & Physiology	4	
ART101	Art Appreciation	4	
ART200	20th Century Art	3	
BIOL101	Biology I	5	
BOT101	Botany 101	3	
CHI 102	Chinese 102	3.55	Hau bu hau?
CSC210	Intro to Crystal Reports	3	
CSC310	Advanced Crystal Reports	3	
EECalc90	Using Engineering Calculator	2	Required based on testing
EENG210	Network Theory	3	
ENG101	English Composition	3	
ENG102	English Literature	0	
ENG315	American Poetry	3	
HIST200	American Civil War	3	
HIST210	European History	4	
MATH101	College Algebra	3	
MATH200	Calculus	3	
MATH300	Advanced Algebra	5	
MME301	Maritime Engineering Introduction	3	
MME302	Maritime Engineering Introduction	3	
MME310	Deck Command - Marine Engineering	4	Required shipboard practicum
MME320	Propulsion Command - Marine Enginrg	4	
MME401	Container Vessels - Marine Eng	5	
MME410	Tanker Vessels - Marine Eng	4	
NAU101	Nautical Science I	4	
NAU200	Storm Navigation	3	New

• Figure 8 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:

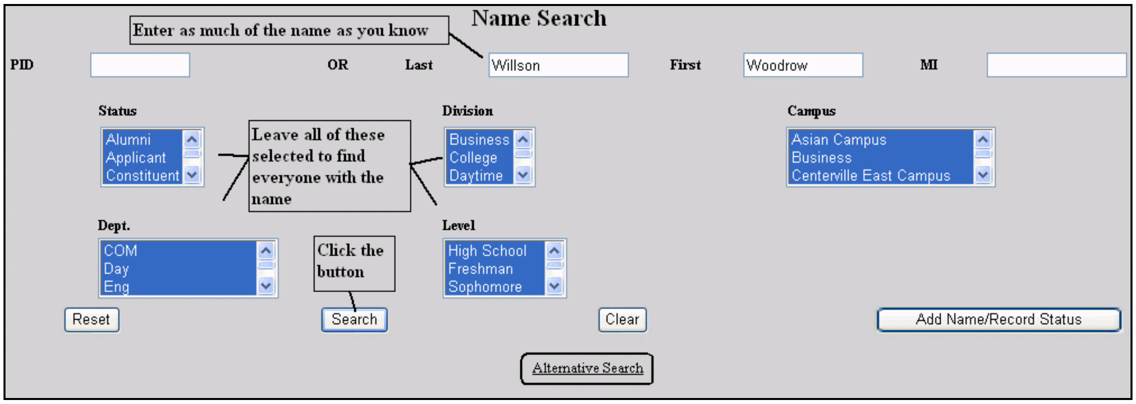
- What was entered in the programs table or the course sections established for the selected semester.
- What programs, courses, and sections are enabled or active. If a program has been marked as disabled, a section has been cancelled or deleted, or a course has been marked inactive, it doesn't appear 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 using the manual "Course & Section Processing".

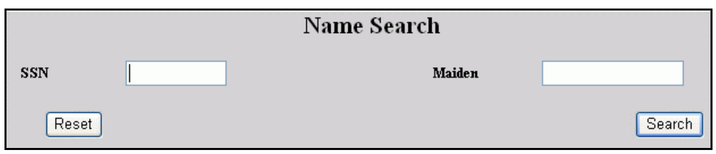
ADDING A NEW PROSPECT RECORD

For those prospective students who do not filling in an inquiry (page 8) or an online application (page 59), you must add the persons to your records with these steps.

1. Select **Names** from Figure 1.



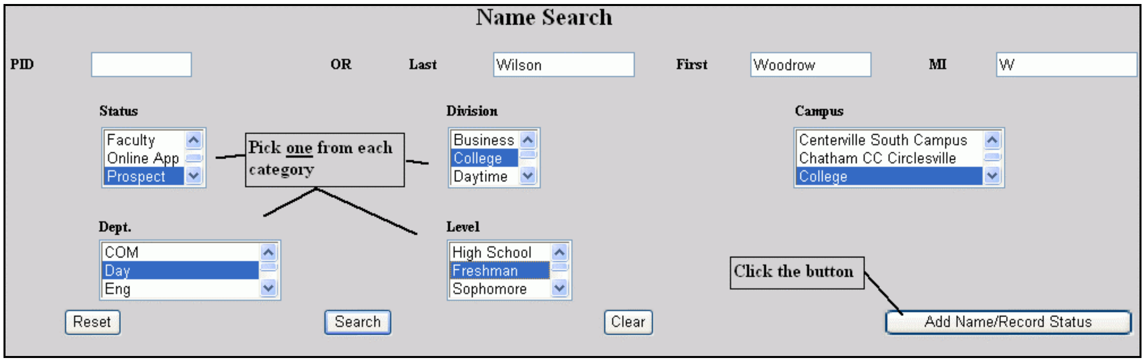
• Figure 9 Names Search to Prevent Duplicates



• Figure 10 Alternative Name Search

2. Enter as much of the name as you know in Figure 9 and search to make sure the person's record is not already present[5].
3. Consider doing an Alternative Search marked at the bottom of Figure 9. It's shown in Figure 10.
4. If you're certain the person doesn't exist in your records, click **Names**, Figure 1. The information you entered in Figure 11 is preserved so you can proceed to add the person as shown in Figure 11.

[5] A prospective student may have entered an online application or could be an alum or a constituent, so it's worth a check.



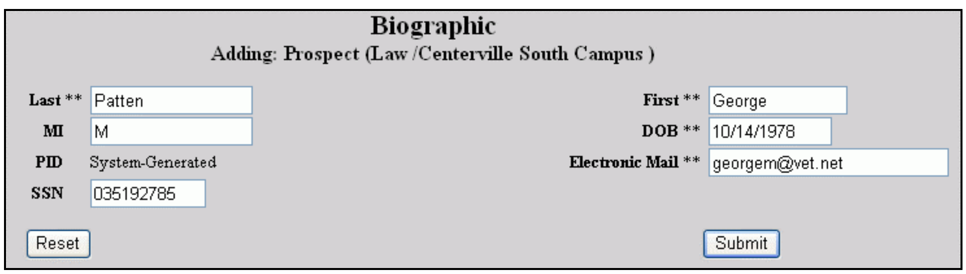
• Figure 11 Names Display

5. Select <u>one</u> of each of these from the middle of Figure 11:

   Record Status[6]: Select Prospect
   Division: Pick the division you know or estimate this prospective student will enroll in.
   Campus: Select the campus this prospective student will attend.

   Department: Select the department.

   Level: usually Freshman unless entering at a higher level.



• Figure 12 New User Information

6. Click the Add button. You get Figure 12.
7. Enter the person's information in Figure 12. If your school uses automatically generated IDs, you see "System-Generated" for PID. If not and you have an ID[7], enter it. If you don't know the Electronic Mail (E-mail) address, enter a ?.
8. Click the Submit button at the bottom of Figure 12. You get Figure 13.

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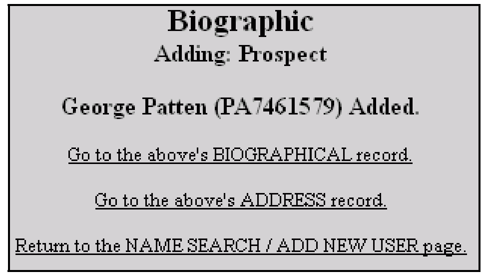
[6] Record status is the role a person has in your institution. A person can have more than one status. The code for prospective students is PS.

[7] ID, also called PID, is the student's number. Whatever it is, it must be 9 characters long with no hyphens or other punctuation.

9. Click the BIOGRAPHICAL line in Figure 13. You see the person's biographic record.

10. Fill out the Biographic[8] record with all the information you have available from the prospective student's inquiry. Click the Submit button.



• Figure 13 Adding a Prospect

11. Click Address[8] in Figure 2. Enter the address information from the prospective student's inquiry. Click the Submit button.

12. Click Prospect Inquiry Details in Figure 2, then follow the directions in "Prospect Details Record" below.

[8] Most of the record data are self-evident. For more information on the biographic and address records, see the SONISWEB® text "Students, Faculty, Applicant and Alumni/ae Record-keeping".

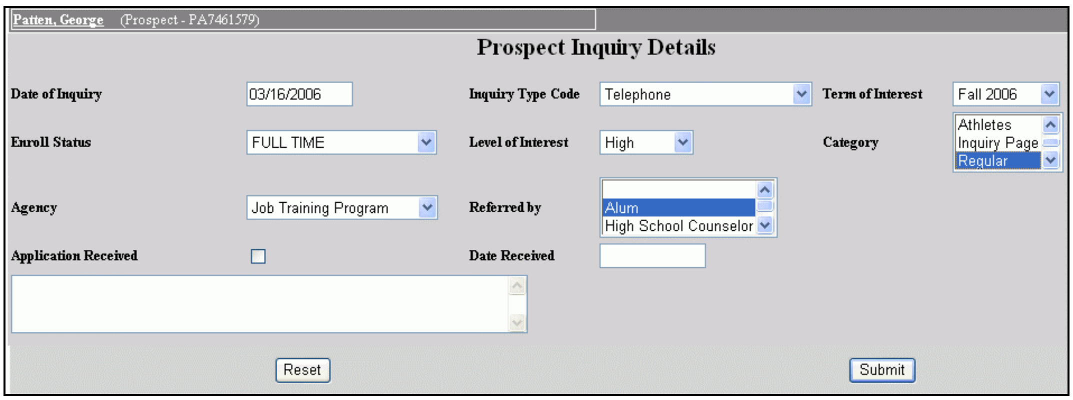
ENTERING PROSPECT DETAILS AND BUILDING A RECRUITING PLAN

Prospect Details Record

When you select a Category[9] in Figure 14, SONISWEB® creates a recruiting plan and activity records for this person based on those defined in that recruiting plan. Setting up the recruiting plan is shown on page 44. "Activities: Marking Completion or Viewing" (page 16) shows you how to examine, mark completion, add, and delete a prospect's activity records.

> The relationships among categories, recruiting plans, and activities is explained in "Recruiting Plans", page 33.

1. You get to Figure 14 by following the steps either in "New Prospect Record From The Web" (page 8) or in "Adding a New Prospect Record " (page 11).



• Figure 14 Prospect Inquiry Details Display

2. Enter the data in Figure 14. The items with pulldown[10] arrows come from SONISWEB® tables. See "Setting up the Recruiting Plan Tables" on page 35 and "Setting up Other Recruiting Tables" on page 46. If you do not find a value you need, contact your SONISWEB® administrator.

   The fields you enter in Figure 14 are (left to right, top to bottom):

   Date of Inquiry: Required.
   Inquiry Type Code: Required. It is set up in "Inquiry Type" on page 50.
   Term of Interest Required. It is set up in "Term of Interest" on page 54.
   Enroll Status: SONISWEB® doesn't require this, but your school may for statistical recruiting studies. It is set up in "Enroll Status" on page 48.
   Level of Interest SONISWEB® doesn't require this, but it is needed for the "Prospective Students Report" (page 26) to be useful. It is set up in "Level of Interest - a.k.a., Interest Level" on page 51.
   Category[9]: Required. It determines which recruiting plan SONISWEB® selects. See "Recruiting Plans" (page 33) for an explanation.

[9] An inquiry from the Web (Figure 4) automatically gets the WEBINQ (called "Inquiry Page" in Figure 47) and its activities assigned. You can change it here.

[10] See Figure 74 "Arrows, Fields, Checkboxes and Buttons" on page 58 for guidance.

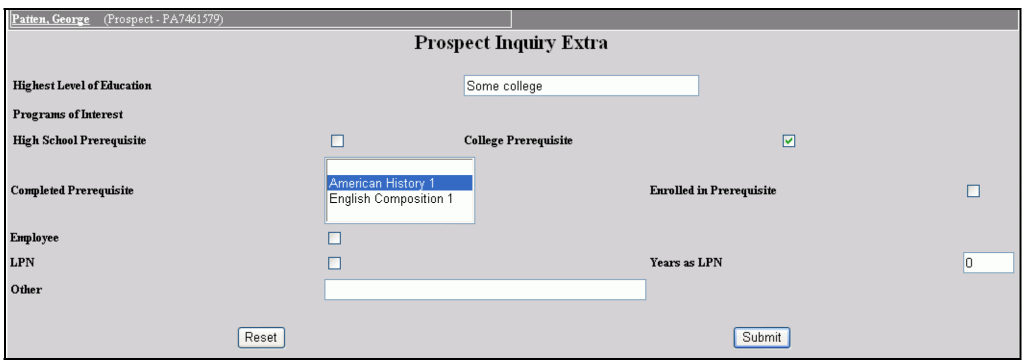
Agency: Required.. It is set up in “Agency” on page 47.
Referred by: SONISWEB® doesn’t require this, but your school may for statistical recruiting studies. It is set up in “Referred By” on page 52.
Application Received means the person is now an Applicant and no longer a Prospect. Once this step is reached, this person’s record should be handled using the SONISWEB® manual “Applicant Checklists, Activities, and Disposition”.
Comments are for any notes you want to add.

3. To erase what you have entered and start over, click the Reset button <u>instead</u> of the Submit button.
4. Click the Submit button to save your entries.
5. At the bottom of the display (you may have to scroll to the bottom of the display to see it), you get a confirming message.
6. Optionally, go to “Prospect Inquiry Extra” below.

Prospect Inquiry Extra

This entry may be required by your school.

1. Click <u>Prospect Inquiry Extra</u> in Figure 2. You get Figure 15.



• Figure 15 Prospect Inquiry Extra

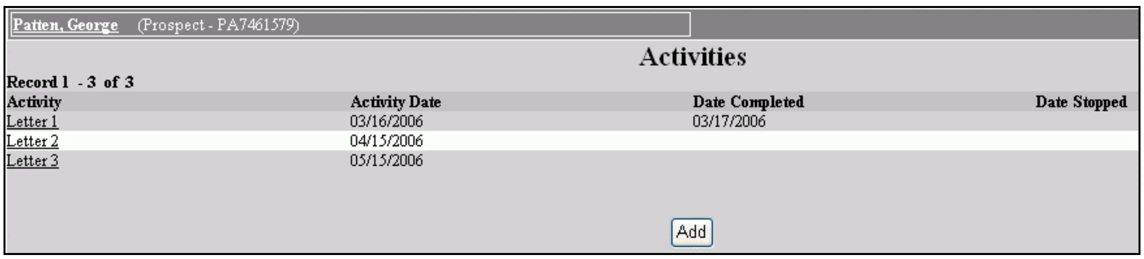
2. Fill in the information in Figure 15 that your school requires.
3. To erase what you have entered and start over, click the Reset button <u>instead</u> of the Submit button.
4. Click the Submit button to save your entries.
5. At the bottom of the display (you may have to scroll to the bottom of the display to see it), you get a confirming message.

ACTIVITIES: MARKING COMPLETION OR VIEWING

Recruiting plans are made up of activities[11] as explained in "Recruiting Plans" (page 33). To view, mark completion, or change these activities, follow these steps.

Activities are assignments for your staff that they have to fulfill.

1. Select **Names** from Figure 1.
2. Enter the ID[7] or name of the student whose prospect details record you want to process.
3. You get a list of the one (or more) students who meet your search criteria. Click the radio button[10] beside the name you want, then click the View button. Figure 2 appears on the left side of your display.
4. Click Prospect Inquiry Details in Figure 2.



• Figure 16 Prospective Student Activities List

The list of activities illustrated in Figure 16 was created when you selected a Category[9] in Figure 14.

• Figure 17 Recruiting Activity Detail

A detailed activity record is shown in Figure 17.

Activity date is either (1) the date the activity was added or (2) the date it's scheduled as described in "Timing and 'Delta Days' Explained" on page 38.

[11] Most recruiting activities are added automatically when a category is entered in the "Prospect Details Record" (page 14). You can add more activities either individually as shown on page 16 or for groups of people as described on page 55.

Date Completed is either (1) automatically added when a timed letter, etc. was run or (2) the date you enter in Figure 17.

Date Stopped applies to timed activities with "Stop on Application" set. It's the date the application was received unless you changed the date in the Activity record.

5. To delete an activity, click the Delete button. You get a confirming display asking if you really mean it.

MASS E-MAIL, LETTERS, AND REPORTS

There are mailing functions and there are reports. Some are specific to prospective students, some are used more broadly.

Under **Reports**:

Activity Report: Prospects

Activity Report: Prospects (RB), page 24.

Activity Reports

Activity Reports (RB)

Mail Merge

Mail Merge (RB)

Mail Merge Students/Applicants

Mail Merge Students/Applicants (RB)

Prospect Inquiry Extra

Prospect Inquiry Extra (RB), page 25.

Prospective Students

Prospective Students (RB), page 26.

Prospects by Type, page 27.

Timed Email

Timed Email: Prospects, page 28.

Timed Letters

Timed Letters (RB)

Timed Letters for Prospects

Timed Letters for Prospects (RB), page 29.

Timed Mail Merge

Timed Mail Merge (RB)

Under **Systems**:

Email: Bulk, page 23.

Email: Prospects, page 21.

Query Builder with E-Mail, page 23.

The mailing functions are described below. The reports are "Activity Report" (page 24), "Prospective Students Report" (page 26), and "Prospects by Type" (page 27

All of the reports use Activities as a basis for selection. Activities are task-lists for your staff and are used for nearly everyone in your SONISWEB® database: prospective students, applicants, students, "alums", etc. You need to know which activities are specifically for recruiting so you know which activities to pick for the reports. Activities are set up on page 35.

Selecting the Type of Note or Letter to Send

E-Mail to Prospective Students is a quick way to send a note to a selected group of prospective students. As described in on page 21, you select the recipients by one or more categories, compose the note, and send it off. It is especially useful for informing prospects of activities of special interest to them.

Timed E-Mail Notes and Timed Letters are more formal ways to send follow-up letters during the recruiting period. It's a one-step process where you set up which letters or e-mail notes are sent immediately and which are sent 30 and 60 days after receipt of an inquiry from the prospective student. Although most heavily used in recruiting, they are also used in fund raising, alumni notices, etc.

Mail Merge is used for producing mailing labels, individualized brochures, and formal letters with selected fonts and graphics. It is a two-step process where SONISWEB® produces a mailing list, then you use a word processor to merge and send the letters either by e-mail or on paper. You cannot select small specific groups of prospective students by category as you can with E-Mail to prospective students or Timed Letters. It is broadly used in SONISWEB® and so is described in a separate text named "Mail, E-Mail Merge, and Mailing Labels".

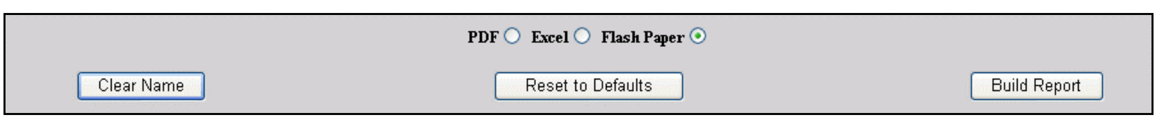
Reports With "RB" and Reports Without

Activity Report: Prospects was built with Crystal Reports™.

Activity Report: Prospects (RB) was built with ColdFusion™ Report Builder.

Those built with **Crystal Reports™** will not be enhanced with new features. New reports will not be built with Crystal Reports™. You must buy a copy of **Crystal Enterprise** (the Web interface) to view and print those built with Crystal Reports™. You must buy a copy of Crystal Reports™ to modify a report provided with SONISWEB®.

Report Builder is a no-cost offering that you can download with ColdFusion™ from a Web site. Like ColdFusion™, it's been tested by its provider to run on most common operating systems and most Web browsers. It provides the additional options in Figure 18.



• Figure 18 Report Builder Output Choices

Figure 18 shows that on most report prompts you can choose to have the output in one of three forms:

PDF file that you can display and print with the free Adobe® reader and save for later use.

Excel spreadsheet file that you save, the best choice for mail-merge and useful where you want to do data analysis on the report data.

Flash[12] **paper** with print, zoom, and paging buttons. It's similar to what you have with the prior Crystal Reports™ output. This is usually the form you'll want to view and print a report.

There are some reports for which these choices make no sense, so these options aren't offered for all reports.

Report Navigation

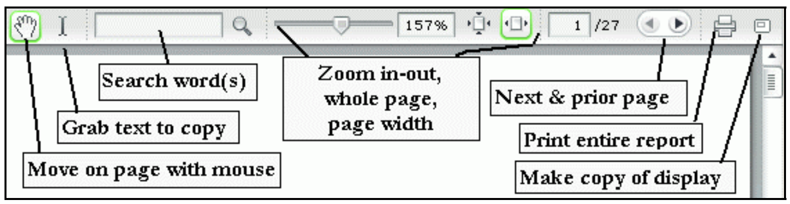
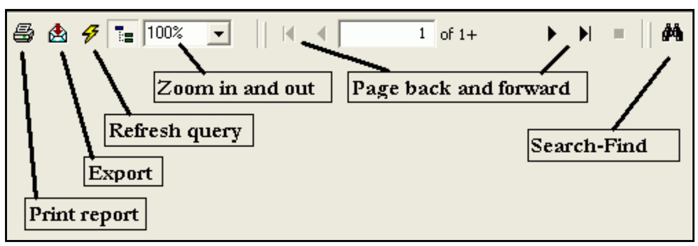


Figure 19 Report Builder (RB) Navigation



• Figure 20 Crystal Reports™ Navigation

Once the report is displayed, you have these controls to view, print, and search it.

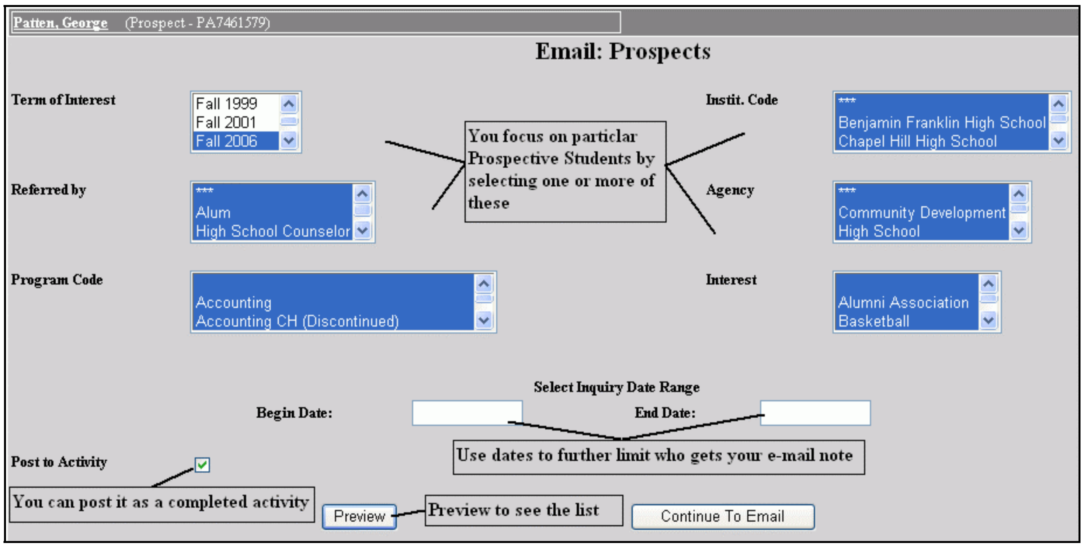
[12] "Flash" is a Web browser display mode that's used with many Macromedia software packages including Cold Fusion™ Report Builder.

E-Mail Notes to Prospective Students

Also called "Mass E-Mail", this sends e-mail notes to selected prospective students. Your user security profile must authorize you to access the "Email: Prospects" under Systems.

> If this note is to go to others in addition to Prospective Students, use "Bulk E-Mail" on page 23. For the broadest selection of people for e-mail notes, see "Query Builder with E-Mail" on page 23.

1. Select **Systems** from Figure 1 then Email: Prospects from Figure 2.



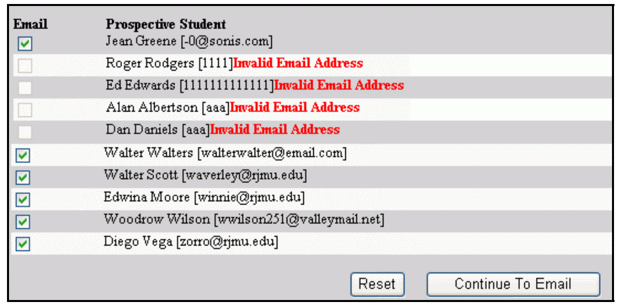
• Figure 21 E-Mail Selections

2. In Figure 21, pick who you want to send this note to by choosing the categories that apply to those prospective students. You can choose more than one. For example, you can chose those interested in the Fall 2005 term and the classical piano program. You can pick more[13] than one item from a list.

3. Click the Preview button to see the list of persons this e-mail will be sent to. Figure 22 is that list.

[13] See Figure 75 "Selecting Multiple Choices" on page 58.

4. Those with invalid addresses[14] in Figure 22 have blank checkboxes. Make a note since you will have to contact those prospective students by some other means.

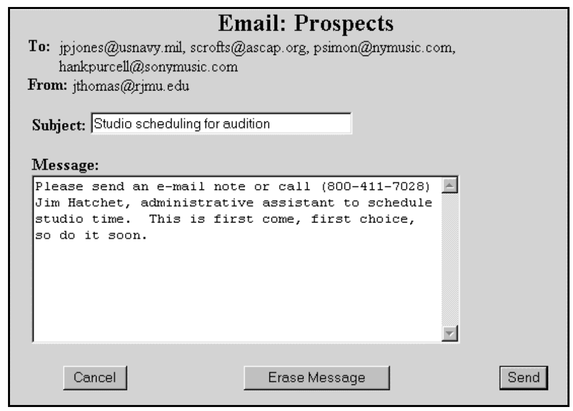


• Figure 22 E-Mail Preview Recipient List

5. To remove persons from the list, click their checkboxes[10] until they're blank.
6. Click the Reset button to start over.
7. Click the Continue button to go to Figure 23.

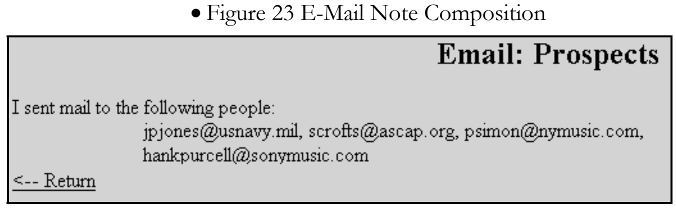
   To cancel it all and start over, click Email: Prospects in Figure 2.

8. Click the Cancel button to stop this process.
9. Enter the subject and the message.
10. Click the Cancel button to start over.
11. Click the Erase Message button to re-enter the subject and message.
12. Click the Send button to send the note.



• Figure 23 E-Mail Note Composition

13. You get the confirmation message shown in Figure 24. Click <-- Return to go back to Figure 21.



• Figure 24 E-Mail Confirmation Message

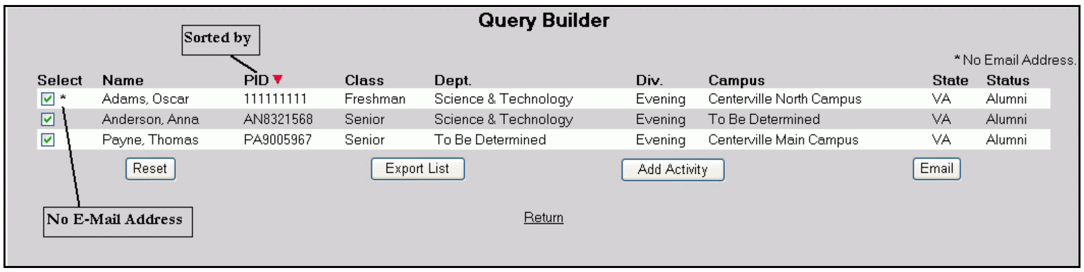
[14] What's detected is an invalid e-mail address structure such as no "@" character. That doesn't guarantee that the e-mail address is valid on the Internet.

BULK E-MAIL

Similar to E-Mail: Prospects (page 21), E-Mail Bulk is for anyone, not just prospects. It works much like E-Mail: Prospects. See the SONISWEB® manual "Mail, E-Mail Merge, and Mailing Labels" if you need more guidance on its use.

For the broadest selection of people for e-mail notes, see "Query Builder with E-Mail" below.

QUERY BUILDER WITH E-MAIL



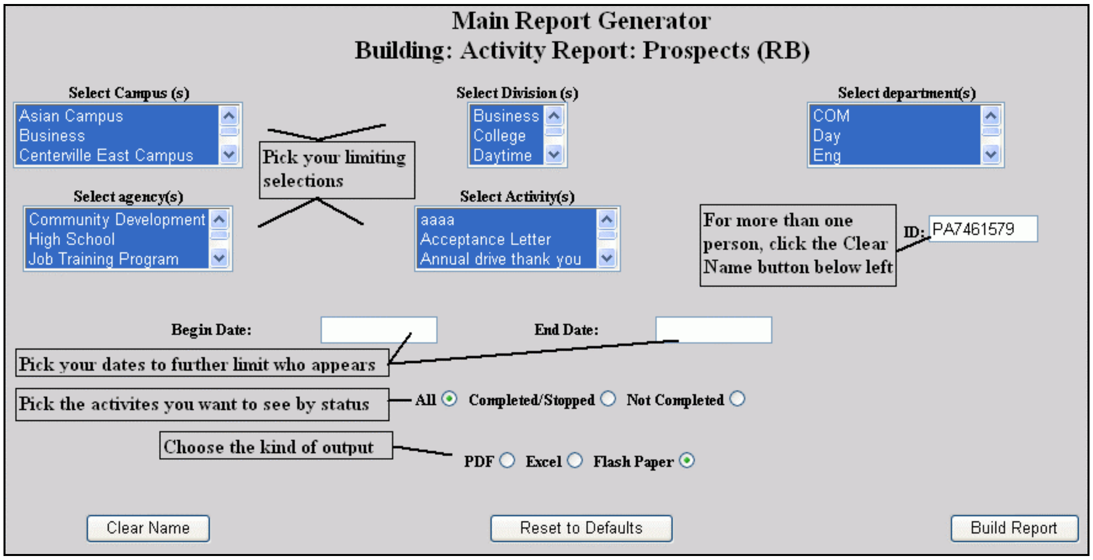
• Figure 25 Query Builder Results

If you want to send an e-mail note or a letter to prospective students in a specific city and state or with more selective criteria, Query Builder is an alternative. Figure 25 shows the output of a query and the buttons that let you create a mailing list, group activities, or e-mail notes. If you're authorized to use it, see the SONISWEB® manual "Query Builder" for guidance in using it.

ACTIVITY REPORT

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 Report: Prospects (RB)[15] from Figure 2. You get Figure 26.



• Figure 26 Activity Reports Selection Prompt

2. Decide who this list is for, then pick[13] the Activity(ies), campuses and other criteria for activities the staff member 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 26. Use the Clear Name button to erase the ID[7] number so you get all the people who meet your campus and activity criteria.

[15] The "RB" reports are built with Report Builder. In Figure 2 there may also be a version built with Crystal Reports™. See "Reports With "RB" and Reports Without" on page 19.

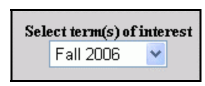
03/17/2006 01:35:57 PM						Page 1 of 8
			PROSPECT ACTIVITY REPORT			
Name	**ID#**	**Activity Date**	**Done Date**	**Stop Date**	**Campus**	**Activity**
AGENCY: Job Training Program						
E-Mail						
Patten, George M	PA7461579	03/17/2006	03/17/2006		CAMP3	E-Mail
Financial Aid Info						
Best, George	BE6069492	11/28/2005			BUSINESS	Financial Aid Info
O'Day, Dawn I	OD5769520	01/04/2006			TBD	Financial Aid Info
Letter 1						
Best, George	BE6069492	11/28/2005			BUSINESS	Letter 1
O'Day, Dawn I	OD5769520	01/04/2006			TBD	Letter 1
Patten, George M	PA7461579	03/16/2006	03/17/2006		CAMP3	Letter 1
Letter 2						
Best, George	BE6069492	01/28/2006		12/29/2005	BUSINESS	Letter 2
Patten, George M	PA7461579	04/15/2006			CAMP3	Letter 2

• Figure 27 Activity Report

3. Figure 27 is the result. Your list will certainly be longer. The list is in alphabetical order by Agency name, then Activity name, then the last name of the prospective students. For more information on printing, paging through reports, or searching for content, see "Report Navigation", page 20.

Prospect Inquiry Extra Report

1. Select **Reports** from Figure 1 then Prospect Inquiry Extra (RB)[15] from Figure 2. That yields a prompt like Figure 26 with the selection shown in Figure 28.



• Figure 28 Selection

> The Term of Interest entries are set in a table. Entries that have been disabled will not appear in the list in Figure 28. Disabling old entries is a good way to reduce the clutter of choices in Figure 28. "Term of Interest" on page 54 shows how to set them.

2. Like the prior reports, you pick[13] the criteria, the click the Build button.

03/17/2006		SonisWeb200		Page 1 of 1
		PROSPECT EXTRA FIELDS REPORT		
Prospect		**LPN**	**Program of Interest**	**Term of Interest**
Patten, George PA7461579				
High School Prereqs required:	No			Fall 2006
College Prereqs required:	Yes			
Currently enrolled in prereqs:	No			
CHS Employee:	No			
Agency:	Job Training Program			

• Figure 29 Prospect Inquiry Extra Report

3. For more information on printing, paging through reports, or searching for content, see "Report Navigation", page 20.

Prospective Students Report

This term-of-interest report assists both in recruiting and in estimating the size of an incoming first-year class.

1. Select **Reports** from Figure 1 then Prospective Students (RB)[15] from Figure 2. That yields a prompt like Figure 26.
2. Pick[10] the criteria.
3. After making your selections, click the Build Report button. (Use the Reset button to reset your selections so you can start the selection process over again.)

03/17/2006 02:33:00 PM SonisWeb200 Page 1 of 1

Prospective Student (Inquiry) Report

Name	Inquiry Date	Agency	Inquiry Type	Category	App. Received	Campus	Division	Dept.	Interest	Enroll Stat
Term of Interest: Fall 2006										
Patten, George (PA7461579)	03/16/2006	Job Training	Telephone	Regular	No	CAMP3	L	LAW	High	FT
Total For Job Training	**1**									
Cjackso, dffs (CJ9953921)	02/09/2006	To Be Determined	Internet	WEBINQ		TBD	TB	TB		HT
Wilson, Woodrow (WI8649634)	03/16/2006	To Be Determined	Internet	WEBINQ		CAMP1	TB	TB		FT
Total For To Be Determine	**2**									
Total For Fall	**3**									

• Figure 30 Example of a Prospective Student Report

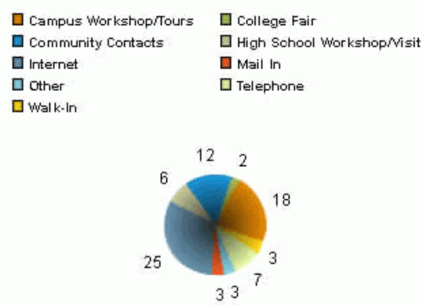
The example in Figure 30 is from the SONISWEB® test system. Your report will be much longer and more meaningful. The report is in order by Term of Interest. Within a term, it is in order by Agency then alphabetically by last name.

PROSPECTS BY TYPE

1. Select **Reports** from Figure 1 then <u>Prospects by Type</u> from Figure 2. That yields a prompt like Figure 26.
2. Pick[10] the criteria.
3. After making your selections, click the Build Report button. (Use the Reset button to reset your selections so you can start the selection process over again.)

Prospects by Inquiry Type for Fall 1999 Fall 2001 Fall 2006 Spring 2000 Spring 2001

Campus Workshop/Tours	18
College Fair	2
Community Contacts	12
High School Workshop/Visit	6
Internet	25
Mail In	3
Other	3
Telephone	7
Walk-In	3
TOTAL:	79



• Figure 31 Example of a Prospects by Type Report

Figure 31 is a summary. To see the detail for any underlined item, click it. That yields Figure 32.

High School Workshop/Visit Prospects for Fall 1999 Fall 2001 Fall 2006 Spring 2000 Spring 2001 Return

Prospect Name	Address	City, State, Zip	E-mail
Abbott , Edgar	15275 New Garden Way	Carraras NC 28111	profabbot@rjmu.edu ,
Bowman , Archer	845 Twentieth St., N.W.	Woodbury CT 06798	arrow@rjmu.edu ,
Emmons , Maureen			memmons@sonis.com ,
Liu , Lucy			Yes@no.com ,
O'Conner , Connie			connieo@emailaddress.com ,
Rooney , Wayne			sfdsfd@fsddfs.com ,

Return

• Figure 32 Detail for Prospect by Type Report

In Figure 32 you have these choices:

- Click an underlined e-mail address and your e-mail system is started[16] for you to send an e-mail note to this person.
- Click **<u>Return</u>** to go back to Figure 26.

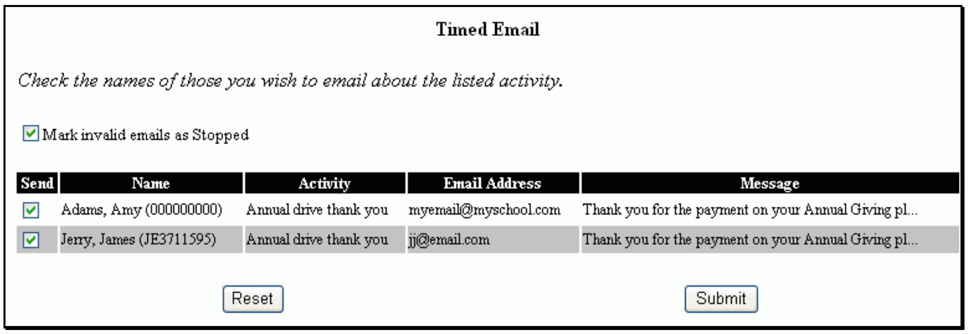
To print Figure 31 and/or Figure 32, use the browser's print icon.

[16] It will not start, of course, if your e-mail system, your network security settings, or SONISWEB® set up doesn't allow direct e-mails. See your SONISWEB® administrator if you have questions about this.

Timed Email: Prospects

If this note is to go to more than just Prospective Students, used Timed Email instead.

1. Select **Reports** from Figure 1 then Timed Email: Prospects from Figure 2. That yields a prompt like Figure 26.
2. Pick[10] the criteria.
3. After making your selections, click the Build Report button. (Use the Reset button to reset your selections so you can start the selection process over again.)



• Figure 33 Timed E-Mail for Prospective Students

Only persons with incomplete timed e-mail activities appear in this list. See "Setting up Activities" on page 35.

4. In Figure 33, use the checkboxes[10]:

   Mark invalid emails as stopped: if the list includes those with invalid e-mail addresses (see the examples in Figure 22), a checkmark means the activity is to be marked as stopped.

   Send, if checked, means send this person the e-mail note.

The note is what was entered when the activity was built, see page 35.

Timed Letters for Prospects

If this letter is to go to more than just Prospective Students, used Timed Letters instead.

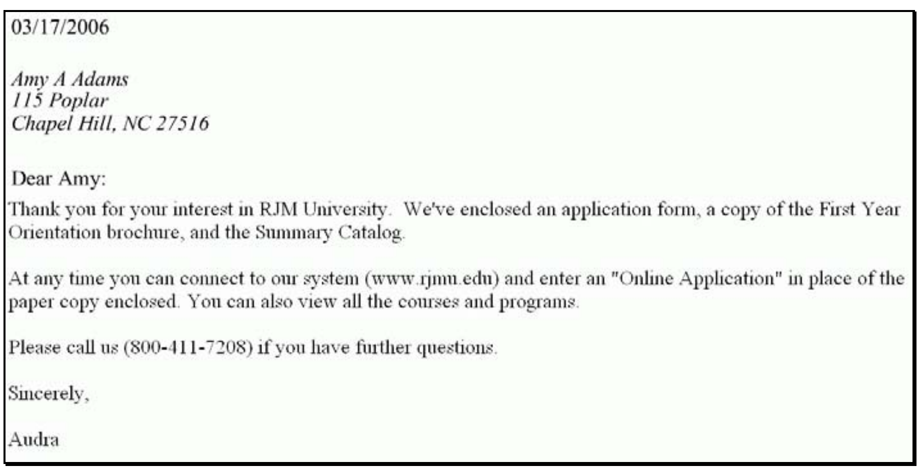
1. Select **Reports** from Figure 1 then Timed Letters for Prospects(RB)[15] from Figure 2. That yields a prompt like Figure 26.
2. Pick[10] the criteria.
3. After making your selections, click the Build Report button. (Use the Reset button to reset your selections so you can start the selection process over again.) You get Figure 34.
4. In Figure 34:

   a. Use Preview Report to see and print the letters.

   b. Use Preview Labels to view and print them. They are sent to your computer as a PDF file[17]. The labels are in the same order as the letters.

• Figure 34 Timed Letter Choices

   c. After you've previewed and printed the letters and labels, click the "Post Activity Completed" button to have the completion checkmark and today's date put in each person's activities record.



03/17/2006

Amy A Adams
115 Poplar
Chapel Hill, NC 27516

Dear Amy:

Thank you for your interest in RJM University. We've enclosed an application form, a copy of the First Year Orientation brochure, and the Summary Catalog.

At any time you can connect to our system (www.rjmu.edu) and enter an "Online Application" in place of the paper copy enclosed. You can also view all the courses and programs.

Please call us (800-411-7208) if you have further questions.

Sincerely,

Audra

• Figure 35 Timed Letters for Prospects - One Page per Person

> Only persons with incomplete timed letter activities get letters and labels. See "Setting up Activities" on page 35.

[17] PDF (Portable Document Format) requires that you have the free Adobe® Reader or equivalent installed on your computer and that your security system permits downloading these files.

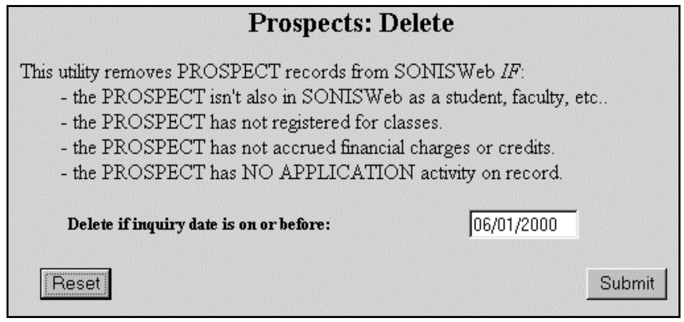
MASS REMOVAL OF PROSPECTIVE STUDENTS RECORDS FROM THE DATABASE

There comes a time when you need to clean out of your database the records of prospective students ("prospects") who did not apply for admission. Once you have run all your statistical reports and are finished with them, you can delete the old records.

1. Select **Systems** from Figure 1 then Prospects: Delete from Figure 2. That yields Figure 36.

2. In Figure 36, use the date to pick which prospective student records you wish to delete.

   At the top of Figure 36 you see the list of which records can be deleted and which cannot be deleted.



• Figure 36 Prospects Delete Selection

> If a person has moved on from prospective student to any other status, you can't delete that person's records.

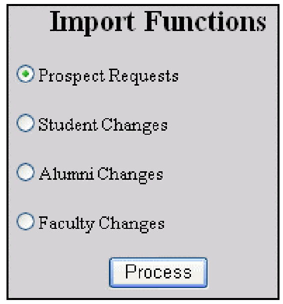
3. Click the Reset button to erase what you have entered so you can start over.

4. Click the Submit button to start the deletion process. You get Figure 37.

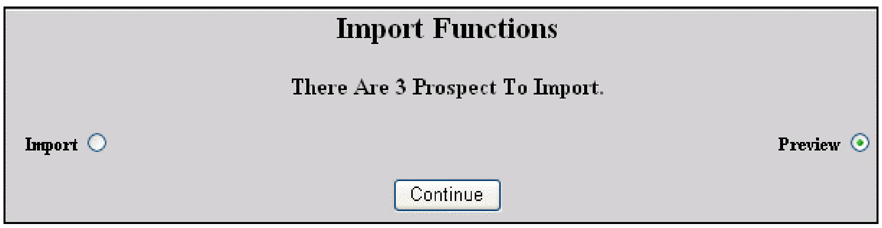
5. Figure 37 shows you the number of prospect records that will be deleted. If this number does not look correct, click Prospects: Delete in Figure 2 again to start over. If the count in Figure 37 is correct, click the button to delete the records.

• Figure 37 Prospect Delete Confirmation

IMPORTING INQUIRIES

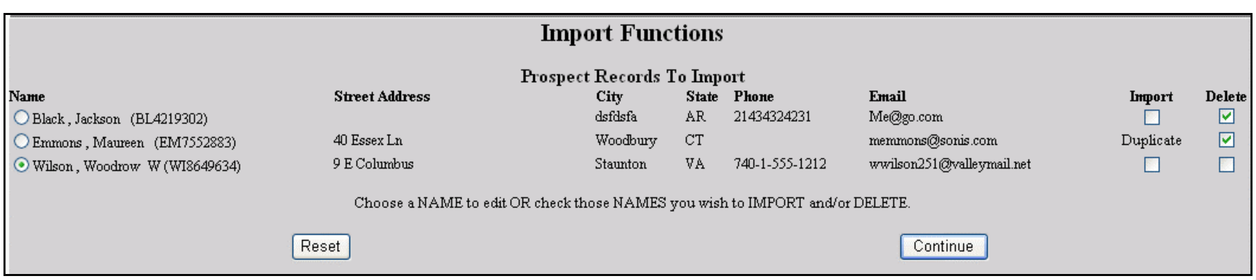


• Figure 38 Import Functions Selection



• Figure 39 Import or Preview

1. Click **Systems** in Figure 1 then Import Functions in Figure 2.
2. Click the Prospect Requests radio button[10] then the Process button in Figure 38. You get Figure 39.
3. In Figure 39 choose:
   - Click the Preview radio button[10] to review those to be imported. You get Figure 40.
   - If you're certain that you don't have any bogus inquiries from people "playing" on the Internet, you can bypass preview by clicking the Import radio button[10].
4. Click the Continue button in Figure 39.

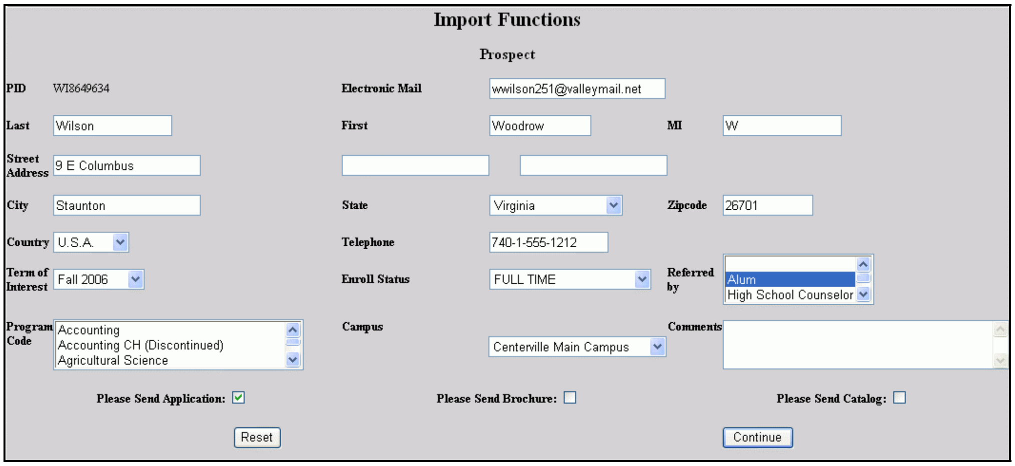


• Figure 40 Delete Imported Inquiries

Preview in Figure 39 gives Figure 40.

5. First use the Delete checkbox[10] on the right in Figure 40 to mark those that are obviously bogus and the duplicate as shown in Figure 40.

6. Click the Continue button to removed those with the Delete checkmarks. You'll get Figure 40 again but without the deleted entries.
7. Optionally you can review and edit those you intend to import by clicking the radio button[10] beside each name.
8. Click the "Continue" button and you get Figure 41.

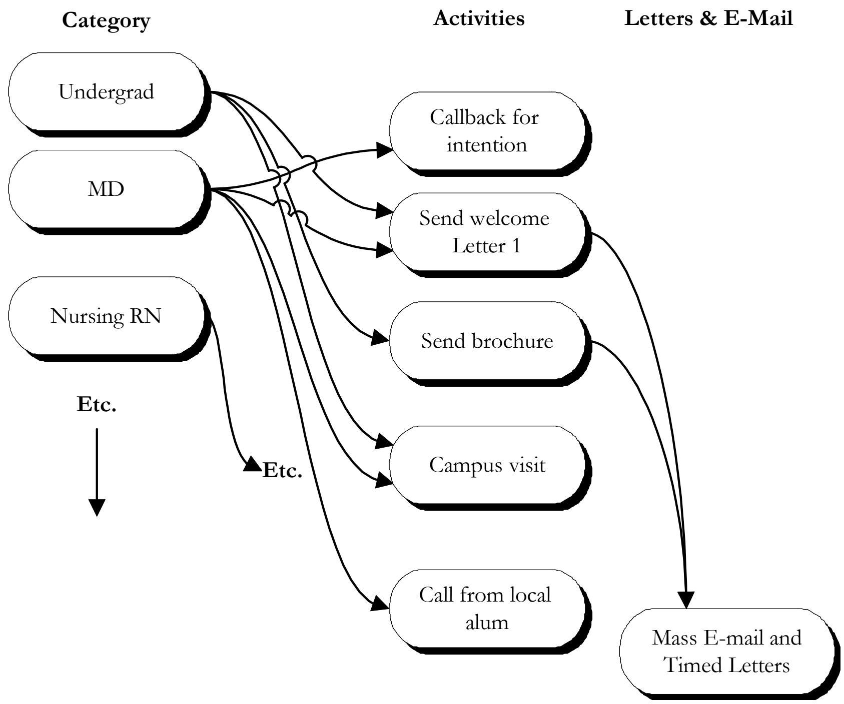


• Figure 41 Edit Before Import

By editing in Figure 41, you clean up any errors made by the prospective student. You can finish filling out the information by entering information the prospective student did not.

9. Once you've finished editing, click the Continue button. You return to Figure 40.
10. In Figure 40, click the Import checkbox[10] for those you want to import and click Continue. The records are imported and added to your database of people.

RECRUITING PLANS



• Figure 42 Recruiting Plan Table Relationships

You set up two key tables, Category and Activities. (The Recruiting Plan table is the "glue" that connects a Category to a set of Activities.) Figure 42 shows the relationship that the Recruiting plans "glue" together.

For those activities that involve a mailing – either paper or e-mail – Mass E-Mail (page 21) or Timed Letters (page 18) provides the means. As you can see in "Activity Report" (page 24) it shows what you have done and what remains to be done for each prospective student.

1. Make a list of the recruiting activities you normally do. Some you do for all courses of study, some only for certain programs. Once you have your list, enter them as shown in "Setting up the Recruiting Plan Tables", page 35.
2. Determine how many different categories you want, then enter them into the Category table.

In Figure 42, the columns are:

Category[9] is used for reporting of prospective students by type. When you check the recruiting activities your programs currently use, you may find that so much is shared, you need very few categories.

Typically there is a category for new students, a category for returning students, and categories for those enrolling in professional and graduate programs. It is easy to define too many categories which then leads to lots of table maintenance in SONISWEB®.

Some schools do not use the SONISWEB® automated recruiting plans but still use Categories to study the effectiveness of their recruiting programs.

There's a default Category for Web inquiries called WEBINQ[9].

Activities[11] define what you want to do during recruiting. Sending a brochure is an activity and it may be shared with all Recruiting Plans. An invitation letter for a campus visit is not needed by returning students so it may be sent only to new prospects.

Recruiting Plans are used to tie a Category to a list of Activities. For example, returning students will likely receive different letters and material from those sent to new prospects. Figure 53 shows what a plan looks like.

Letters & E-Mail are activities that you use to communicate with prospective students. See "Mass E-Mail, Letters, and Reports" on page 18 for your choices.

SETTING UP THE RECRUITING PLAN TABLES

As Figure 42 shows, it is best to work out your recruiting plan from left to right, from Category to Recruiting Plan to Activities. It is best to build the plan in SONISWEB® in this order:

- First, define all the activities you currently need below.
- Next, set up the categories described on page 40.
- Finally, define the recruiting plans that tie together categories and activities, page 43.

SETTING UP ACTIVITIES

Activities[11] create the task-lists[18] for your staff. Using "Activity Report" (page 24) you track what has and has not been done. Staff print the tasks they're responsible for.

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. Select **Systems** from the top list Figure 1. You get Figure 2.
2. From the list in Figure 2, click Activities. That yields Figure 43.

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 43 Activities Table

In Figure 43 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.

[18] For applicants, there's an Applicant Checklist that is their task-list. See the SONISWEB® manual "Applicant Checklists and Dispositions" for more on that.

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[19] 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®.

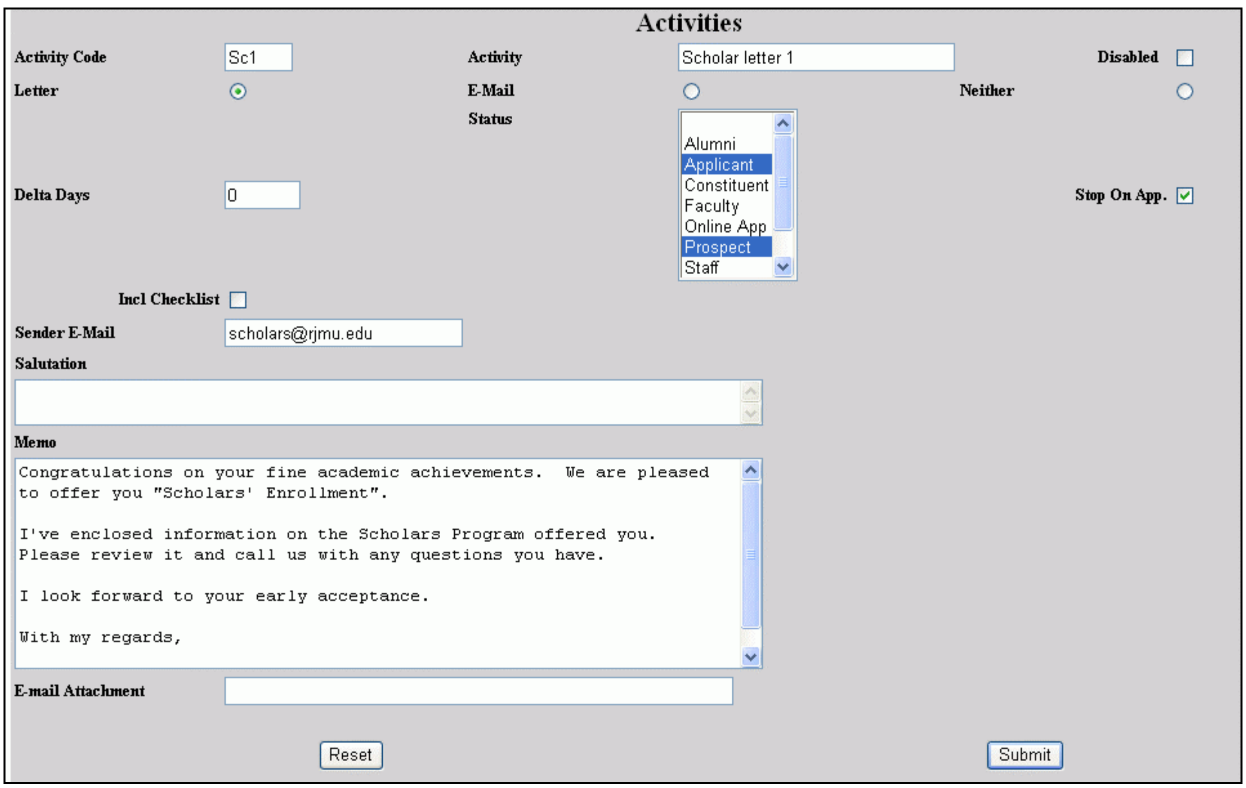
Disabled N specifies whether ("Y") or not ("N") this activity is still active and usable.

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®.

3. 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 44, although it is blank for a new entry.



• Figure 44 Activity Record

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

4. 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[20]; 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.

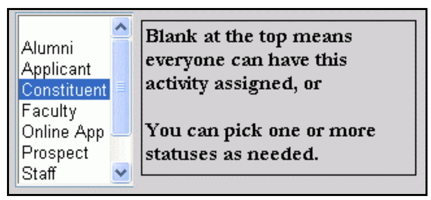
Letter radio button[20]; a filled circle means this activity is a timed letter and will appear as a choice when selecting timed letters. Click the radio button until it is filled if this is a timed letter activity.

E-Mail radio button[20]; 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[20]; 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.

Status usage is shown in Figure 45.



• Figure 45 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".

[20] See page Figure 74 on page 58 for guidance.

E-Mail Salutation lets you personalize the note. See "Salutation Choices" on page 39 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 it's <u>not</u> a letter or the e-mail note (the Neither radio button is marked), the memo is only a comment to further describe this activity.

• Figure 46 E-Mail Attachment Example

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 46 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[21] so you can attach them.

5. Click the Reset button to clear what you entered and start over.
6. Click the Submit button to store what you entered. That yields Figure 43.
7. 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[22] 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 44, 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 44, you check E-Mail, Stop on App., and set Delta Days to 30. It is sent anytime you run Timed E-Mail <u>after</u> 30 days has passed <u>if</u> an application has not been received.

  A third is sent in 60 days if an application has not been received. In Figure 44, you check E-Mail, Stop on App., and set Delta Days to 60. It is sent anytime

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

[22] 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 described in "Timed Email: Prospects" and "Timed Letters for Prospects" starting on page 28. 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 Categories and Recruiting Plans

Once you have defined the activities to be used in recruiting plans (page 35), you set up the categories and the plans.

1. Select **Systems** from Figure 1 then click Table Maintenance in Figure 2. That yields a list of tables from which to choose. (Figure 55 on page 46 shows it.)
2. Click the table named “Category” then the Submit button. You get Figure 47.

Defining Categories

Categories are used in two ways:

- For statistical analysis and reporting of recruiting results; the category and other parameters filled in with “Prospect Inquiry Details Display” (Figure 14) are stored in prospective student records. Using query or statistical software, you can run studies to see what is effective in recruiting categories of students.
- For automatically assigning recruiting plans and activities to prospective students as outlined in “Entering Prospect Details and Building a Recruiting Plan” on page 14.

Table Maintenance - *category*

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

Category	Category	Disabled
(categr_cod)	(categr_txt)	(disabled)
AthleteTrack	**Athlete Track Field**	**0**
GradSchBus	**Grad Business School**	**0**
GradSchEngin	**Grad School Enginrg**	**0**
WEBINQ	**Inquiry Page**	**0**
Regular	**Regular**	**0**
Returning	**Returning**	**0**

• Figure 47 Category Table

1. To add a new category click the Add button (Figure 47). You get Figure 48.

Table Maintenance

ADDING a new record to table: **category**. **Note: No column can be left blank.**

Category	Category	Disabled
(categr_cod)	(categr_txt)	(disabled)
GradSchEngin	Grad School Enginrg	0

Reset Submit

• Figure 48 Category Record Add

2. Enter the code and name you want in Figure 48.
3. Click the Reset button if you want to erase what you entered and start over.
4. Click the Submit button. When you next see Figure 47 it will have the new category in the list.

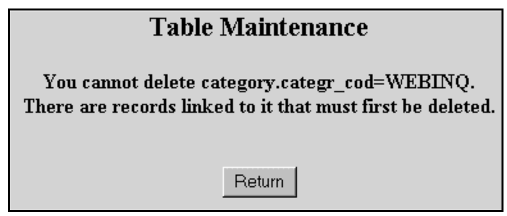
> The category WEBINQ (Figure 47) is built-in and generates a basic set of activities when a person enters a Web Inquiry as shown in Figure 4. Like the categories you create, you determine the activities as shown in "Setting up the Recruiting Plan Tables" on page 35.

Editing a Category

1. To edit an existing category, click its underlined code in Figure 47. It looks like Figure 48 but with a Delete button. You can change the category text but not the category code.
2. Click the Reset button if you want to erase what you entered and start over.
3. Click the Submit button to save your changes.

Deleting or Disabling a Category

1. Click the underlined code in Figure 47. It looks like Figure 48 but with a Delete button.
2. To disable a category so it cannot be selected in a recruiting plan, enter a 1 (the digit one) in the Disabled field. To enable a category that has been disabled, replace the 1 with a 0 (the digit zero).



• Figure 49 Category Deletion Refusal

3. Click the Reset button if you want to erase what you entered and start over.
4. Click the Submit button to save your changes.
5. To delete a category, click the Delete button. You may get a response like Figure 49.

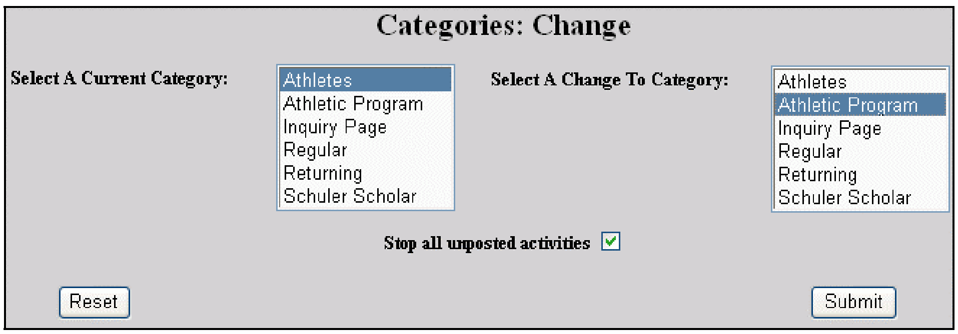
   Figure 49 means that it is in use and so cannot be deleted. You can still disable it which has the same effect.

Substituting Categories

You can replace one category with another. It is useful if you want to rename categories or merge several into one.

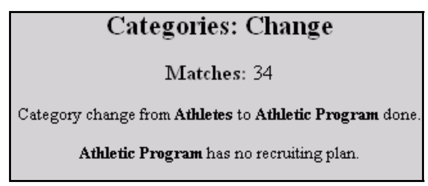
If you change a person's category, <u>all</u> of the recruiting plan activities for the new category will be added to this person's record. If an administrator makes a category substitution, <u>all</u> of the recruiting plan activities for <u>all</u> of the people with that new category will be added to their records.

1. Select **Systems** from Figure 1 then click <u>Categories: Change</u> in Figure 2. That brings Figure 50.



• Figure 50 Categories: Change

2. In the left list click the category you want to <u>change</u>, then click the category you want to <u>change it to</u> in the right list.
3. The "**Stop all unposted activities**" checkbox stops all activities on the old (current) category. That's usually done so that the activities in the replacement category can be applied.
4. Click the Reset button if you want to erase what you entered and start over.
5. Click the Submit button to save your changes.
6. Figure 51 is your confirmation.



• Figure 51 Category Change Confirmation

Setting up Recruiting Plans

When you define a recruiting plan, you tie together categories with activities. The diagram in Figure 42 is a way to visualize what you are doing.

1. Select **Systems** from Figure 1 then click Recruiting Plans in Figure 2. That yields Figure 52.

Recruiting Plans

Record 1 - 20 of 27

Category	**Activity**
Athlete Basketball	Acceptance Letter
	Callback
	Campus Visit
	Financial Aid Info
Grad School Enginrg	Callback
	Campus Visit
	E-mail
	Financial Aid Info
	Grad Engineering Recruit lette
	Send Application
	Send Brochure
	Send Catalog
Regular	Campus Visit
	E-mail
	Financial Aid Info
	Letter 1 Prospects
	Letter 2 propect followup
	Letter 3 prospect followup
	SAT
	Send Application

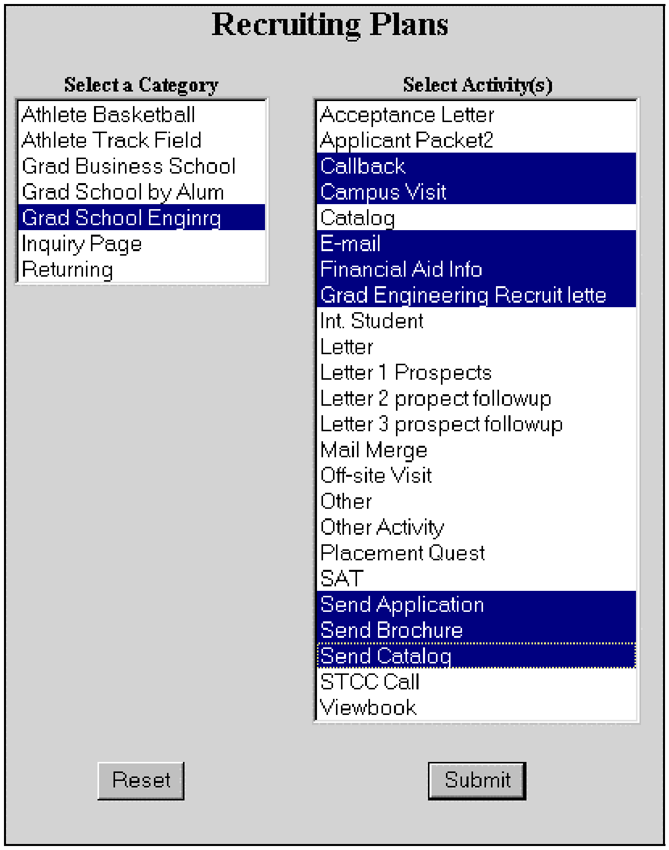
Next

Add

• Figure 52 Recruiting Plans List

Adding a New Recruiting Plan

1. To add a new recruiting plan, click the Add button in Figure 52. You see Figure 53.



• Figure 53 Add Recruiting Plan

2. Start in the left (Category) list in Figure 53 and select the category you are defining.

3. Now switch to the right (Activities) list. With your mouse you select the activities you want in the plan.

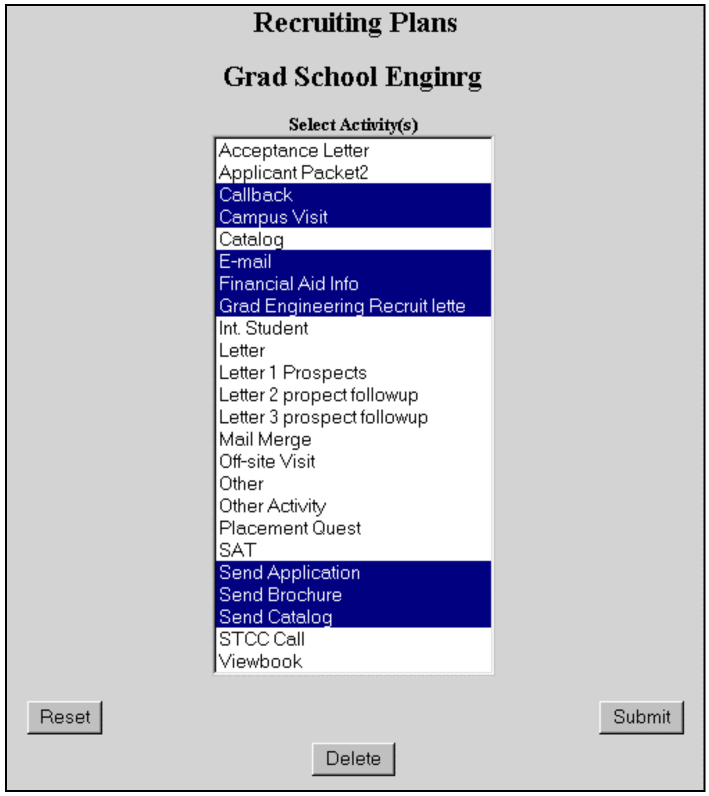
   As described on page 58, you click the first item you want. All the others have their "selection" highlighting removed. Then you press and hold the **Ctrl** key on your keyboard and select the next item you want with your mouse. While continuing to hold the **Ctrl** key, keep selecting activities with your mouse until you have all that are to be in this recruiting plan, then release the **Ctrl** key. You see that the selected ones are highlighted as illustrated in Figure 53.

4. Click the Reset button if you want to erase what you entered and start over.

5. Click the Submit button to save your changes.

Changing an Existing Recruiting Plan

1. Click the plan's underlined name in Figure 52. You see Figure 54.



• Figure 54 Activity Selection for a Recruiting Plan

The activities you selected when you added or last changed the plan are highlighted as shown in Figure 54.

2. With your mouse you select the activities you want in the plan.

   As described on page 58, you click the first item you want. All the others have their "selection" highlighting removed. Then you press and hold the **Ctrl** key on your keyboard and, with your mouse select, the next item you want. While continuing to hold the **Ctrl** key, keep selecting activities with your mouse until you have all that are to be in this recruiting plan, then release the **Ctrl** key. You see the selected ones are highlighted as illustrated in Figure 54.

3. To reset and re-select, click the Reset button instead of clicking the Submit button.

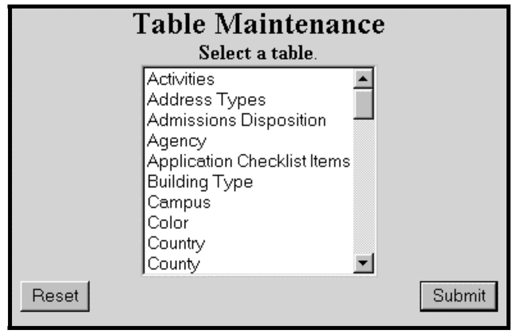
4. To save your selections for the recruiting plan, click the Submit button.

5. To delete all the activities in this plan, click the Delete button. You get a confirming display or a refusal to delete the plan if it is in use.

When you change a recruiting plan, you'll probably have some left-over activities in people's records from the prior plan. You need to decide what to do with those, to mark them as stopped or as completed or to leave them unfulfilled.

SETTING UP OTHER RECRUITING TABLES

As "Prospect Inquiry Details Display" (Figure 14) shows, there are other parameters not directly related to recruiting plans. One of them – Term of Interest – is used by the "Prospective Students Report" (page 26). The others are only used by schools that do statistical or marketing analysis on their recruiting programs. They are all contained in tables. The setting of those tables is described here.



• Figure 55 Table Selection Display

1. Select **Systems** from Figure 1 then click <u>Table Maintenance</u> in Figure 2. That yields a list of tables in alphabetical order as shown in Figure 55. Scroll down the list of tables to find the one you need.

   A quick way to get to a table is to click the first name in the list, then use your keyboard to enter the first letter of the table you want. The list in Figure 55 jumps to the first table starting with that letter.

2. Click the name of the table, then the Submit button.

3. Follow the steps for the tables as outlined below.

Agency

An alphabetical list of all existing entries in that table appears in Figure 56.

Table Maintenance - *agency*

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

Agency code	Agency text	Disabled
(agency_cod)	(agency_txt)	(disabled)
ComDev	**Community Development**	0
HS	**High School**	0
JTPA	**Job Training Program**	0
JC	**Junior College**	0
TBD	**To Be Determined**	0

• Figure 56 Agency Table

1. To add a new entry, click the Add button. To edit an existing entry, click the "Agency code" button for that entry. In either case, you get a display like Figure 57, although it is blank for a new entry.

Table Maintenance - *agency/agency_cod*

Agency code	Agency text	Disabled
(agency_cod)	(agency_txt)	(disabled)
HS	High School	0

Reset Submit

Delete This Record

• Figure 57 Agency Record

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

Agency code
(agency_cod)

   Agency Code is the abbreviation you want to use for this Agency. It creates the "buttons" you see in Figure 56. When adding a new Agency, you enter the code in a field like that on the right. When editing an Agency, you cannot change the code as you can see in Figure 57.

   Agency Text should be clear and unique and related to the Agency Code so users know what it is and where it is used.

   Disabled should be zero (0) which means it can be selected. A one (1) means it is disabled and cannot be selected for the pulldown in Figure 14.

3. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it. Unlike Disabled, this is a permanent deletion. It cannot be enabled again if you need it.

Enroll Status

An alphabetical list of all existing entries in that table appears in Figure 58.

Table Maintenance - *enrlstat*

ADD New Record   **OR Edit Record (click on Button in the row):** Sort Order

Credit Hours	Credit To	Disabled	Enrol status code	Enrol status text
(cred_hours)	(credit_to)	(disabled)	(enstat_cod)	(enstat_txt)
		0		
15.00	99.00	0	FT	FULL TIME
6.00	8.00		HT	HALF TIME
1.00	5.00		PT	PART TIME
9.00	14.00	0	3T	THREE-QUARTER TIME

Make sure there is no overlap in the credits between "Enrol status" entries

• Figure 58 Enrollment Status Table

The basic codes such as FT, HT, etc. shown in Figure 58 are required. They're used for the interfaces to some of the financial aid[23] software that SONISWEB® imports from and/or exports to. You can add others for your institution's internal use if you wish.

1. To add a new entry, click the Add button. To edit an existing entry, click the Code button for that entry. In either case, you get a display like Figure 59, although it is blank for a new entry.

Table Maintenance - *enrlstat/enstat_cod*

Credit Hours	Credit To	Disabled	Enrol status code	Enrol status text
(cred_hours)	(credit_to)	(disabled)	(enstat_cod)	(enstat_txt)
15.00	99.00	0	FT	FULL TIME

Reset Submit

Delete This Record

• Figure 59 Enrollment Status Record

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

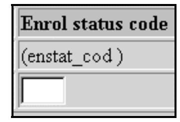
Credit Hours is the minimum semester credit hours for this enrollment status code.

Credit To is the maximum semester credit hours for this status.

You must get these credit hours right. They are used by your financial aid staff to manage eligibility requirements that get reported to the government. Get the required credit hour entries from your Financial Aid staff for this entry.

[23] See the SONISWEB® manual "Financial Aid".

Disabled should be zero (0) which means it can be selected. A one (1) means it is disabled and cannot be selected for the pulldown in Figure 14.



Enrol Status Code is the abbreviation you want to use for this status. It creates the "buttons" you see in Figure 58. When adding a new entry, you enter the code in a field like that on the right. When editing an entry, you cannot change the code as you can see in Figure 59.

Enrol Status Text should be clear and unique and related to the Code so users know what it is and where it is used.

3. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it. Unlike Disabled, this is a permanent deletion. It cannot be enabled again if you need it.

Inquiry Type

An alphabetical list of all existing entries in this table appears in Figure 60.

Table Maintenance - *inqtype*

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

Disabled	Inquiry type code	Inquiry type text
(disabled)	(inqtypecod)	(inqtypetxt)
0	05	Campus Workshop/Tours
0	08	College Fair
0	07	Community Contacts
0	06	High School Workshop/Visit
0	04	Internet
0	03	Mail In
0	09	Other
0	01	Telephone
0	02	Walk-In

• Figure 60 Inquiry Type Table

1. To add a new entry, click the Add button. To edit an existing entry, click the Code button for that entry. In either case, you get a display like Figure 61, although it is blank for a new entry.

Table Maintenance - *inqtype/inqtypecod*

Disabled	Inquiry type code	Inquiry type text
(disabled)	(inqtypecod)	(inqtypetxt)
0	04	Internet

Reset | Submit

Delete This Record

• Figure 61 Inquiry Type Record

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

   Disabled should be zero (0) which means it can be selected. A one (1) means it is disabled and cannot be selected for the pulldown in Figure 14.

   Inquiry Type Code is the abbreviation you want to use for this status. It creates the "buttons" you see in Figure 60. When adding a new entry, you enter the

Inquiry type code
(inqtypecod)

code in a field like that on the right. When editing an entry, you cannot change the code as you can see in Figure 61.

Inquiry Type Text should be clear and unique so users know what it is and where it is used.

3. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it. Unlike Disabled, this is a permanent deletion. It cannot be enabled again if you need it.

Level of Interest - a.k.a., Interest Level

An alphabetical list of all existing entries in this table appears in Figure 62.

Table Maintenance - *interlev*

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

_Inter LevCode	Disabled	Interest Level
(intrlevcod_id)	(disabled)	(intrlevcod)
3	0	Low
2	0	Mild
1	0	Very High

• Figure 62 Interest Level Table

1. To add a new entry, click the Add button. To edit an existing entry, click the Code button for that entry. In either case, you get a display like Figure 63, although it is blank for a new entry.

Table Maintenance - *interlev/intrlevcod_id*

_Inter LevCode	Disabled	Interest Level
(intrlevcod_id)	(disabled)	(intrlevcod)
1	0	Very High

Reset Submit

Delete This Record

• Figure 63 Interest Level Record

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

_Inter LevCode
(intrlevcod_id)
System Generated

_Inter LevCode is automatically generated by SONISWEB®. It creates the "buttons" you see in Figure 62. When adding a new entry, you see the field like that on the right. When editing an entry, you cannot change the code as you can see in Figure 63.

Disabled should be zero (0) which means it can be selected. A one (1) means it is disabled and cannot be selected for the pulldown in Figure 14.

Interest Level should be clear and unique so users know what it is and where it is used.

3. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it. Unlike Disabled, this is a permanent deletion. It cannot be enabled again if you need it.

Referred By

An alphabetical list of all existing entries in this table appears in Figure 64.

Table Maintenance - *referby*

ADD New Record | **OR Edit Record (click on Button in the row):** Sort Order

_Referred By Code	Disabled	Exclude Outside System	Referred By	Sorting Order
(refer_by_cod)	(disabled)	(exclude_rfb)	(refer_by)	(sortorder)
1	0	0	Internet Web Page	
2	1	0	Newspaper	
3	0	0	High School Counselor	0
4	0	0	Alum	0

• Figure 64 Referred By Table

1. To add a new entry, click the Add button. To edit an existing entry, click the Code button for that entry. In either case, you get a display like Figure 65, although it is blank for a new entry.

Table Maintenance - *referby/refer_by_cod*

_Referred By Code	Disabled	Exclude Outside System	Referred By	Sorting Order
(refer_by_cod)	(disabled)	(exclude_rfb)	(refer_by)	(sortorder)
4	0	0	Alum	0

Reset | Submit

Delete This Record

• Figure 65 Referred By Record

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

_Referred By Code
(refer_by_cod)
System Generated

_Referred By Code is automatically generated by SONISWEB®. It creates the "buttons" you see in Figure 64. When adding a new entry, you see the field like that on the right. When editing an entry, you cannot change the code as you can see in Figure 65.

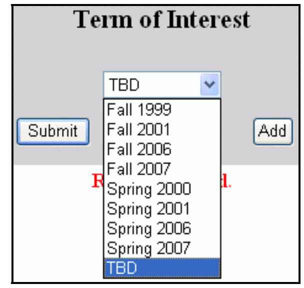
Disabled should be zero (0) which means it can be selected. A one (1) means it is disabled and cannot be selected for the pulldown in Figure 14.

Exclude Outside System is not currently used.

Referred By should be clear and unique so users know what it is and where it is used.

3. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it. Unlike Disabled, this is a permanent deletion. It cannot be enabled again if you need it.

Term of Interest



• Figure 66 Term of Interest Selection

This sets the selection list for the term or semester the prospective student is interested in.

1. Select **Systems** from Figure 1 then click Term of Interest in Figure 2. You get a simple display with a pulldown list from which you can pick the tern
2. To add a new entry, click the Add button in Figure 66. To edit an existing entry, click the pulldown[10] to select a Term.
3. Enter or change the data in the table, then click the Submit button. You get Figure 67.

• Figure 67 Term of Interest Entry

Term of Interest is the exact term you want to appear in selection menus.

Disabled: blank means it can be selected. A checkmark means it is disabled and cannot be selected for the pulldown in Figure 14.

Exclude Outside System is not currently used.

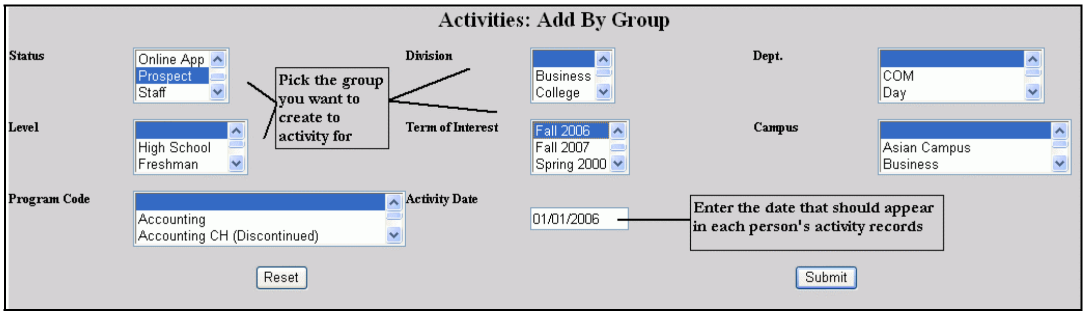
4. If you wish to delete this entry, click the Delete button. You get a confirming display asking if you really mean it. Unlike Disabled, this is a permanent deletion. It cannot be enabled again if you need it.

To remove the clutter of choices, it's a good idea to Disable past terms that are no longer valid for selecting for a new prospective student.

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 68.

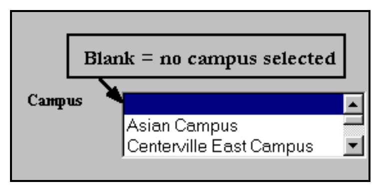


• Figure 68 Activities by Group

2. In Figure 68 define the group by selecting[13] 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 71.

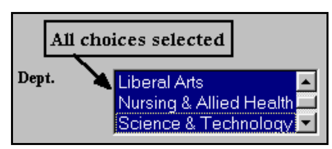
In selecting criteria, do this:

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 69.



• Figure 69 "Blank" Selection

To pick all of the choices[13], 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 70.



• Figure 70 All Choices Selected

To pick more than one choice[13] 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.

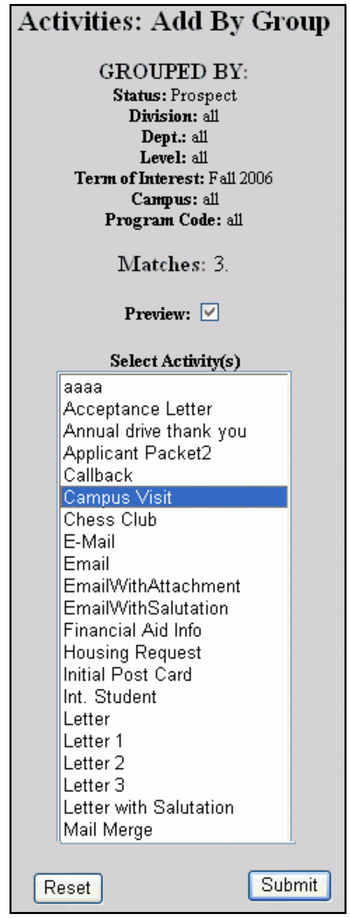
5. In Figure 71 look first at the top. It confirms for you what you selected in Figure 68.

> If what you see at the top of Figure 71 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[13].

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

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



• Figure 71 Activity Selections for the Group

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

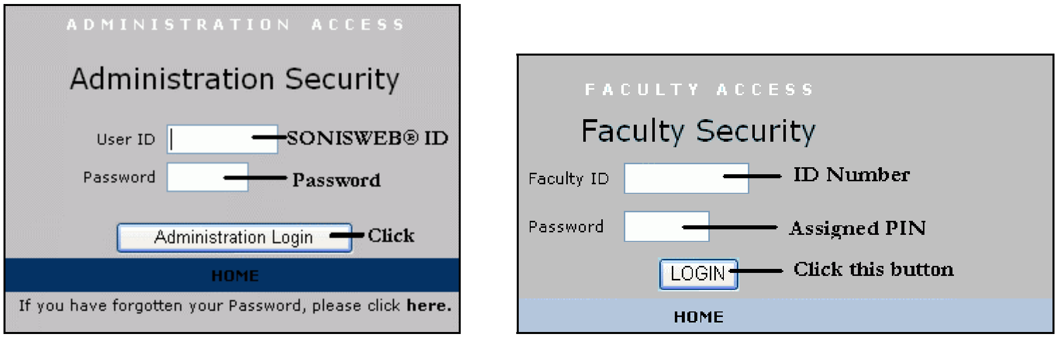
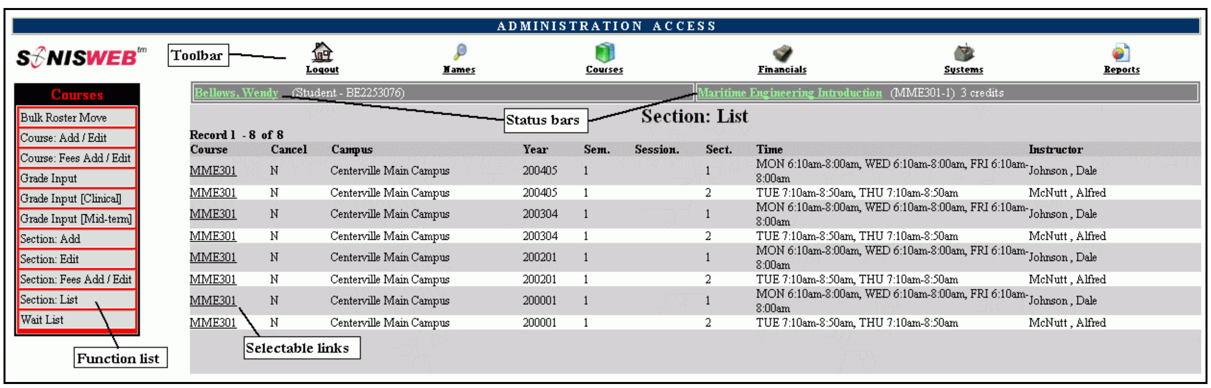


Figure 72 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 72.



• Figure 73 Typical SONISWEB® Page

Figure 73 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 73 click an underlined **Selectable Link** and you go to that record.

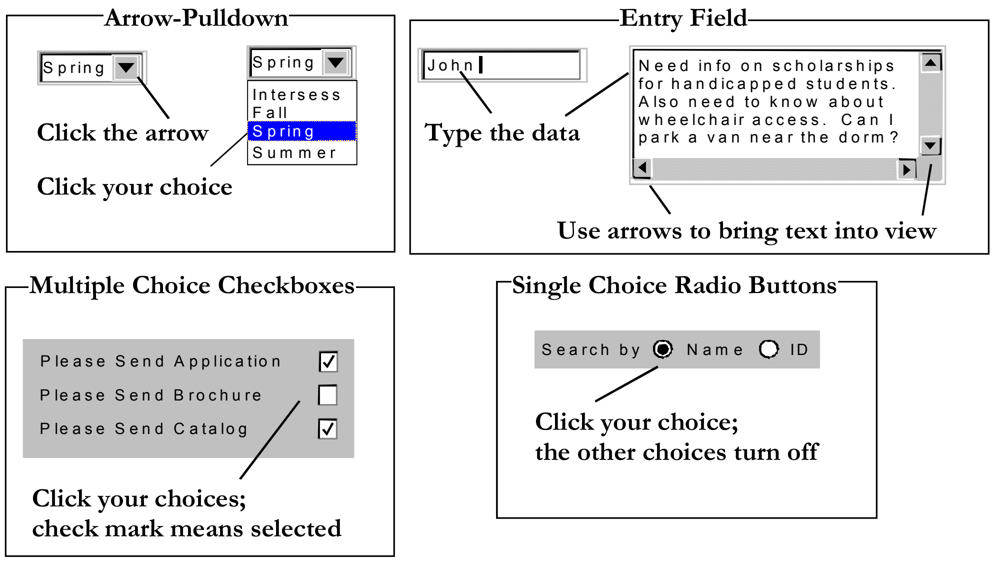


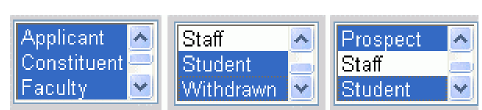
Figure 74 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 74. 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.

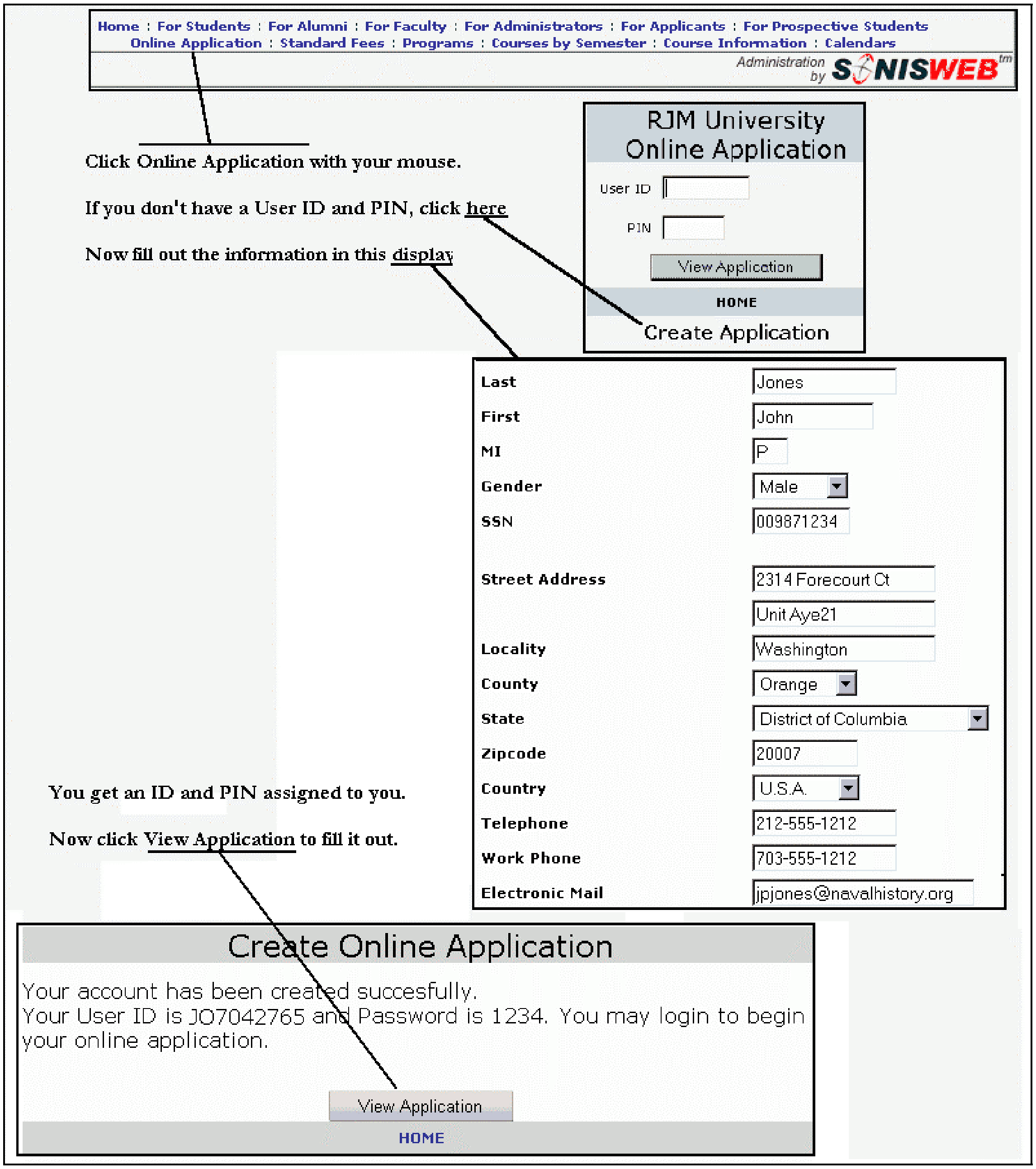
- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 75.



• Figure 75 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 75.

ONLINE APPLICATION



• Figure 76 New Online Applicant

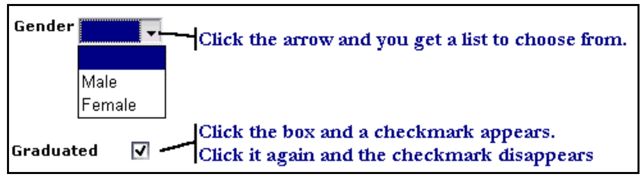
Follow the steps in Figure 76 to get an ID and PIN assigned so you can fill out the application. You'll need it to view or change it later.

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

Filling Out the Application

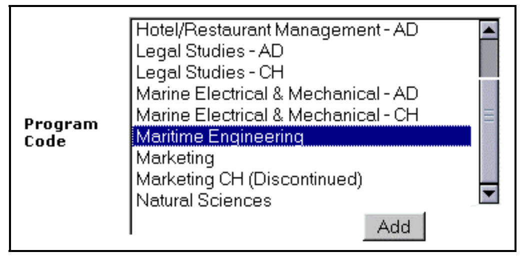
Figure 77 shows the two special types of fields you use in filling out the application.

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 77 Pulldown-Arrow Menus and Checkboxes

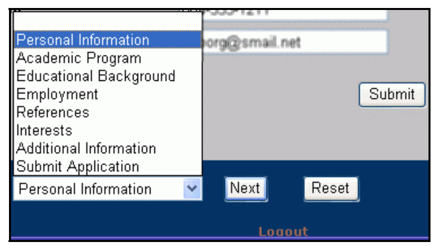
When you see an **Add** button in a display like Figure 78, pick from the list or enter the requested information, then click the **Add** button. You keep adding until you have all you need, then click the **Next** button.



• Figure 78 Adding and Removing Entries

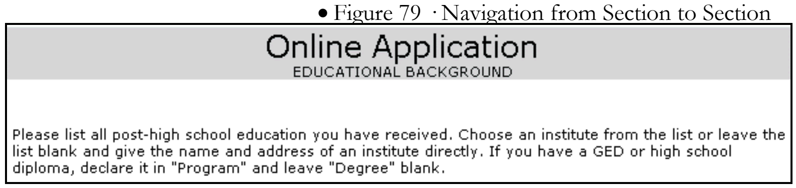
Clicking the **Next** button in Figure 79 takes you to the next section of the application. But, if you want to go directly to a section, click the arrow and pick the section from the menu.

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



• Figure 79 · Navigation from Section to Section

Note the guidance and instructions at the top of some displays. Figure 80 is an example.



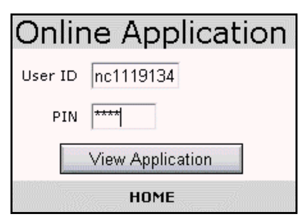
• Figure 80 Instructions and Guidance

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 81 and then click the **View** button.

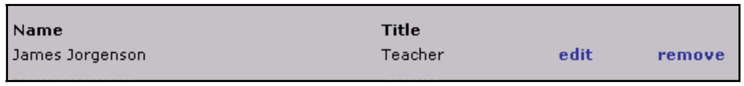
Use the choices shown in Figure 79 to get to the section you want to see or change.

You'll see what you've already entered as illustrated in Figure 78.



• Figure 81 Login to View or Change Online Application

In Figure 82 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 78) to add a new item.

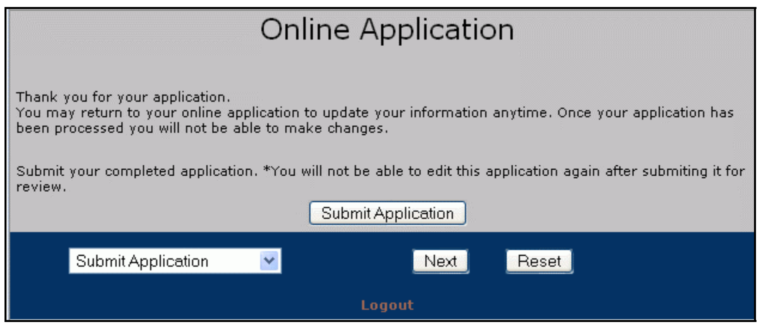


• Figure 82 Online Application Edit and Remove

Submitting the Application

You can return to your application to add information. You use your newly issued PID and PIN in the login display shown at the top right of Figure 76. Once you've finished, you submit it by:

1. Choosing "Submit Application" from Figure 79.
2. Clicking the Next button in Figure 79. You see Figure 83.



• Figure 83 Submit Application

3. In Figure 83 read the instruction to make sure you've not left out anything needed to make your application complete.

   Once you've submitted the application, you can't log on again and add or change information in it. However, it can't be reviewed by the admissions staff <u>until</u> you submit it.

4. When you're satisfied with it, click the "Submit Application" button.