



Scholastic ONLINE Information System
for the Web

What's New in Version 2.0

© 2004-2006 RJM Systems – all rights reserved

SONISWEB® Version 2.0 incorporates over 80 new and improved functions and features. These enhancements maintain SONISWEB® as the premier Web-based academic administrative system.

For a synopsis of the entire SONISWEB® system, go to www.sonis.com.

We can tell you much more and arrange a demonstration. Call us at 800-411-7208 or send a note to support@sonis.com.

February 2006

Systems, Inc.

The logo for RJM Systems, Inc. It features the letters "RJM" in a stylized, blue, serif font, with the "R" and "J" overlapping. To the right of "RJM" is the text "Systems, Inc." in a blue, italicized, serif font.

SONISWEB[®] Version 2.0

Applicant Functions 5

- Transcript and Reference Receipts and Checklists 5
- Test Receipts and Checklists 5
- Controlled Date for the Applicant Record 6
- Disposition Activity Review 6
- Web Access for Online Applicants 7
- New Look for the Applicant Display 7

Billing & Finance 8

- Payment Plans Added 8
 - Setting up Payment Plans 8*
 - Use of Payment Plans 9*
 - Payment Plans Report 9*
- Interest Charge for Late Payments 10
- Flatfee Simplification Filter 11
- Post-to-Billing Date Change 12
- Post-to-Billing Pre-Bill for Anticipated Bills 12
- Third Party Billing 13
- Program Fee Description Option 13
- Program Type Levels for Fee Settings 14
- Reverse Tuition in Refunding 14
- More Inclusion and Exclusion Choices for Bills 14
- Fee-Affiliation Function 14
- Financial Holds 17
- Download Batches 18

Course Management & Registration 19

- Registration Course Selection Options 19
- Move Students to Another Course Section: Bulk Roster Move 20
- Official-Grade Change Archiving 21
- Once Official, Clinical and Midterm Grades Treated Like Course Grade 21
- Transfer Course Institution Filter 22

- Course Equivalent Institution Information 22
- Course Sections on the Campus of an Affiliated School 22
- Reverse Tuition in Refunding 23
- Registration Detection of Same Course in Same Semester and Session 24
- Registration of Same Course in Different Sessions 25
- Course Section Program and Level Restriction 25
- Fee-Affiliation Function 25
- Withdrawn Student Grade Assignment 25
- Exclude-Faculty Option in the Grades Table 25
- Faculty-Assigned Scores Available to Administrators 26
- Repeated Courses: Best Grade Rather Than Last Grade 26

Development & Fund Raising 27

- Constituent Information Record and Supporting Tables 27
- Licenses-Certificates and Interests Added to Constituent Records 27
- User-Security Added to Constituent Records 27
- Check Number on the Displays and Reports 27
- Pledge, Event, and Fund Codes More Tightly Connected 28
- Fund Mapping to Accounting 28

Employment and Career Guidance: Job Posting 29

- Employer Records 29
- Employer Access 31
- Job Applicant Access 33
- Employer Report 35

Enrollment Management 36

- Exports for Enrollment by Date 36

Enrollment Detail Report Drill-down
Enhancements 36

Faculty Functions 37

Registration Display 37
Session Display for Courses 37
Gradebook Drop-Lowest-Grades Enhancement 37
Deleting Scores in Gradebook 37
Attachment with an E-Mail Note 37
Textbook Details 38
Textbook Additions by Faculty 39

Financial Aid 40

Enrolled Hours in Financial Aid Record 40
Dependency Status and Housing Status Added 41
Fund Allocation and Balance in Awards 42
More Student Information from EDEXpress 43
Veteran Status Shown on Financial Aid Record 43

Government and Support Organizations 44

IPEDS Enrollment Report 44
IRS 1098T Box 6 Function 44
IRS 1098T Halftime Hours 44

Query Builder 45

Building the Query 45
Using the Query Results 46

Rooms and Buildings 47

Room Search - Room Finder 47
Quicker Navigation of the Rooms and Buildings
Function 48
Equipment and Facilities for All Rooms 48
Building Attributes and Features 49

Reports and Mailing 50

Reports Using Cold Fusion™ Report Builder 50
Choice of Paper, PDF, or Excel Output 50
Mail Merge Direct Export to Excel File 51

Level Selection Option for Mailing Labels 51
Mailing Labels as Adobe® PDF Files 51
Receivables Report: Additional Selection,
Exclusion, and Inclusion Options 51
Awards Summary Report 51
“Sophomore” Not “2” on Report Selections 51
Including Transfer Courses in Course Listing 52
Leave of Absence Report Status Option 52
Excludes from E-Mail 53
Dynamic Salutations in Timed Letters 53

Student and Alumni/ae Access 54

Forum for Student Dialog 54
Registration Course Selection Options 54
Display of Multiple Instructors for a Course 54
Session Display for Courses 54
Student Changes to the National Student Loan
Clearinghouse Block 54
Separate Settings for Student and Alumni/ae
Display Control 55
Staff Added to Search Choices 55
Payment Plans 55
Institution Details on Education Record 55

Others 56

Locator for Students and Faculty 56
Limitation on Who Can Place Holds 56
Prevent Known Bad Addresses from Becoming
the Preferred Address 57
Preserving Your Entries During Name and Course
Searches 57
Enforcement of the System-Generated ID Number
57
Current Password Not Required to Change User
Security 57
Change My Password Function 57
Separate Status Options in Web Options 58
Changing the Display Colors 59
Custom Web Style Sheets 59

For more information 59

(SONISWEB Version 2.0 Release.doc - 07/14/06 11:17 AM)

APPLICANT FUNCTIONS

Transcript and Reference Receipts and Checklists

Education				
Record 1 - 4 of 4				
Institution	Active	Degree	Dates Attended	Grad.
EJM University	Y	B.A.	-	Y
Jackson Community College	N		08/01/1998 - 06/01/1999	N

• Figure 1 Add with Checklist Item

When you set up Education or Reference records for an applicant, there's a new button, "Add W/ Checklist Item(s)" shown in Figure 1. Click it instead of the Add button and a checklist entry is added that includes the name of the institution or the reference. The circled items in Figure 2 show how it looks in the checklist.

Checklist			
Record 1 - 10 of 13			
Program		Complete	Date Completed
Core	Application Fee	N	
Core	Health Records	N	
Core	Reference	N	
Core	Reference- J P Jones	N	
Core	SAT or ACT Scores	N	
Core	Transcript	N	
Core	Transcript- Jackson Community College	N	

• Figure 2 Named Checklist Items

When you receive the transcript or reference and you check its "Received" checkbox in the person's record you're offered the standard choice of applying it to the checklist. With a named checklist item, it gets checked off for you automatically as seen in Figure 3.

References	
Record 1 - 1 of 1	
Name	Date Received
J P Jones	01/18/2006

• Figure 3 Checkoff of a Named Reference Received

Where the name of institution or reference you enter is not one in the checklist, you're presented with checklist transcript or reference items without names so you can use one of them.

This also makes the Applicant display clearer since the applicant can see which specific items have not been received. You see that in Figure 7 on page 7.

Test Receipts and Checklists

The receipt of ACT and SAT scores works in a similar way to "Transcript and Reference Receipts and Checklists" above. When you enter a received set of scores, you are led to the SAT-ACT checklist items so you can check the item as completed.

Controlled Date for the Applicant Record

To give you more control over dates in Applicant records, the dates are limited to those you put in a table. To the person entering the information, the pulldown menu of dates offered are those you put in the table.

Application Entry Date		
Record 11 - 17 of 17	Entry Date	Disabled
	<u>09/01/2003</u>	N
	<u>01/13/2004</u>	N
	<u>01/21/2004</u>	N
	<u>03/03/2004</u>	N
	<u>06/02/2004</u>	N
	<u>09/01/2004</u>	N
	<u>11/11/2005</u>	N

• Figure 4 Application Entry Date

You set those dates in **Systems Application Entry Date**. The table looks like Figure 4. Click the Add button and you can add a new date.

Since you may not want to leave old entry dates available for selection, you can disable a date by clicking that underlined date and clicking the Disabled checkbox. If you have an “Application Entry Date” that’s never been used, you can delete it. However once it’s been used you can only disable it if you want to prevent its use.

Disposition Activity Review

When a disposition is recorded for an Applicant, a count of incomplete activities is shown. You see it in the circled link near the bottom of Figure 5.

First enter the disposition information and click the Submit button.

Abboti, Edgar (Applicant - 333333334)

Disposition

Add Item To Disposition Record

Program / Entry Date
Disposition
Date

Memo

[10 Uncompleted or Unstopped Activities](#)

• Figure 5 Disposition and Incomplete Activities

After you’ve submitted the disposition, you can click the disposition record you just entered, click the “[...Uncompleted or Unstopped Activities](#)” link in Figure 5 and you get Figure 6.

For those activities you do not want to stop, in Figure 6 click the checkbox until it's blank.

When you click the Submit button, those checked are stopped and those without a checkmark remain active and incomplete.

(Activities in Figure 6 are tasks your staff must do. Checklists, shown in Figure 2, are what the applicant must do.)

Uncompleted Activities	
Activity	Stop
Acceptance Letter	<input type="checkbox"/>
EmailWithSalutation	<input checked="" type="checkbox"/>
Letter	<input checked="" type="checkbox"/>
Financial Aid Info	<input checked="" type="checkbox"/>
SAT	<input checked="" type="checkbox"/>
Mail Merge	<input checked="" type="checkbox"/>
Callback	<input checked="" type="checkbox"/>
Letter with Salutation	<input checked="" type="checkbox"/>
StudentAlumniRequest	<input checked="" type="checkbox"/>
Letter 1	<input checked="" type="checkbox"/>

• Figure 6 Incomplete Activities List

Web Access for Online Applicants

Normally those using the Online Application process access their records and change them through that portal. Once their application is submitted, they need to use the standard Applicant access like Figure 7 so they can see their checklist items and their disposition. Applicant access (status = AP) is now open to Online Applicants (status = OA).

New Look for the Applicant Display

The look and function of the Applicant page has been changed to more clearly separate the checklist items from disposition and to put the checklist items in alphabetical order. It also shows the named references or transcripts set up with “Transcript and Reference Receipts and Checklists” on page 5.

SonisWeb200			
Application Status			
for Edgar Abbott			
15275 New Garden Way Carraras NC 28111 profabbot@rjmu.edu 919-555-1212			
Logout			
Description	Completed	Date Completed	
Checklist Items			
Application Fee	Yes	01/18/2004	
Health Records	No		
Reference	No		
Reference - J P Jones	Yes	01/18/2004	
SAT or ACT Scores	Yes	01/18/2004	
Transcript	No		
Transcript - Jackson Community College	Yes	01/18/2004	
Dispositions			
Disposition Status:	Accepted	01/18/2004	Accounting

• Figure 7 Applicant Display

BILLING & FINANCE

Payment Plans Added

Payment plans are not tied directly to a person's charges in the financial system since you may be providing a payment plan for some lesser portion of the total charges. Your institution negotiates the payment plan with the student and then applies it in Figure 10. But first you have to set up the plans.

Setting up Payment Plans

To set up payment plans, you first establish the codes. That's under **Systems Table Maintenance** "Payment Plan Codes". There you can add a new plan code. For an existing plan, you can change its name, disable it, or if it's never been used, delete it.

With the code established you select **Systems Payment Plans** and get Figure 8. Click an underlined code "name" and you see a display like Figure 9.

As Figure 9 illustrates, you set the days and the payment percentage expected on that date. "Delta Days" is the number of days from the date you put in a person's payment plan record. An illustration of a payment date calculation is seen in Figure 11.

You can add more "Delta Days" and "Payment Percentages" to the list using the fields shown.

You can disable an obsolete payment plan using the "Disable Payment" checkbox.

The "Fee Codes" pulldown lets you pick the transaction code these payments apply to. You can pick a code, click the Submit button, pick another code, click the Submit button, and so on until you've picked all that apply. To delete a code, click its underlined code (SE, for example) and it's deleted.

Payment Plans	
<u>3-Payment Plan</u>	Percentage used 45%
<u>4-Payment Plan</u>	Percentage used 100%
<u>Alternate Payment Plan</u>	Percentage used 91%
<u>Another Payment plan</u>	Percentage used 18%
<u>Five-Payment Plan</u>	Percentage used %

• Figure 8 Payment Plans

• Figure 9 Payment Plan Record

If you're setting up a new payment plan, you enter the Delta Days and Payment Percentages and SONISWEB® checks to make sure both the days and the percentages are consecutive.

Once in place, you can click an underlined “PP Delta Days” in Figure 9 and change both the days and percentage or you can delete it. SONISWEB® doesn’t check that you’ve kept everything consecutive when you change a plan, so be sure what you change makes sense.

Use of Payment Plans

To assign a payment plan, use Names to find the person and click Payment Plans from the function list. That yields Figure 10.

Payment Plan	Agreed Date	Start Date	School Year	Agreed Amount
<u>3-Payment Plan</u>	12/19/2005	01/07/2006	200405	\$0.00
<u>4-Payment Plan</u>	01/18/2006	01/07/2006	200304	\$1,550.00

Select Payment Plan:

• Figure 10 Payment Plan Assignment

To add a new one, use the “Select Payment Plans” pulldown to select a plan then click the Add button.

There are two ways to replace a payment plan. You can use the Void checkbox at the bottom of Figure 11. You can also change the “Agreed Amount” to zero. You see that has happened in Figure 10.

For an existing plan, click its underlined name and you get Figure 11.

4-Payment Plan

Agreed Date: Start Date: Agreed Amount: School Year: 200304

Due Date: 01/16/2006 Amount Due: \$62.00
 01/26/2006 Amount Due: \$279.00
 02/06/2006 Amount Due: \$852.50
 02/26/2006 Amount Due: \$1,550.00

Void

• Figure 11 Payment Plan Details

Here you can change the dates and the agreed amount. Click the Submit button and SONISWEB® uses the Start Date and Agreed Amount to compute the due dates and amounts as you see at the bottom of Figure 11. The “Amount Due” is cumulative based on the percentages in Figure 9.

Payment Plans Report

Under **Reports** is Payment Plans that lists the sum of each plan. Clicking the underlined name of a plan takes you to the details of who is signed up for the plan and each person’s balance.

Interest Charge for Late Payments

You invoke this under **Financials Finance Charges**. Clicking that yields Figure 12.

Financial Search
Preparing: Finance Charges

Last Name: OR First Name:
ID:

Record Status **Division** **Campus** **Department** **Level**

Prospect Business Asian Campus COM High School
Staff College Business Day Freshman
Student Daytime Centerville East Campus Eng Sophomore

School Year **Semester**

200405 Fall
200304 Fall - 1a
200201 Fall - 1b

As of Date **Exclude Prior Semesters** **Exclude Negative Projected Balances**

Days **Interest**

• Figure 12 Finance Charge Selections

In Figure 12 you pick who this applies to. For an individual, enter the name or PID. For a group enter the Status, Division, etc. to pick the group this late charge applies to.

You can exclude certain items with the “Exclude...” checkboxes.

The “As of Date” is when the counting starts. After the time specified in the “Days” field, the charge percentage in “Interest” takes effect. Click the Submit button and you get Figure 13.

Finance Charges

School Year **Semester**
Posting Date **Fee Codes**

Name	Amount Due	Interest
Abbott, Edgar (333333334)	\$11,203.58	112.04
Adams, Amy (000000000)	\$13,600.71	136.01
Adams, Mary (AD4523155)	\$2,475.00	24.75
Adams, Oscar (111111111)	\$1,138.10	11.38
Ammons, John (AM7129759)	\$1,594.00	15.94
Arston, Arnie (AR9959292)	\$25.50	0.26
Applegate, Cynthia (909090909)	\$9,322.00	93.22
Arnold, Jane (AR1833324)	\$922.00	9.22
Arronson, Jacob (000000542)	\$282.50	2.83

• Figure 13 Proposed Finance Charge List

These are the people who qualify based on your selections in Figure 12. First you pick the financial transaction code you want to use in the “Fee Codes” pulldown. That’s what will appear on the bill and ledger.

Review the list to make sure that all these people should be charged. You can change the “Interest” amount for each in the column on the right. Once you’re satisfied that the people and amounts in Figure 12 are correct, go to the bottom of the display and click the Submit button. At the date specified by “As of Date” plus “Days” from Figure 12, these fees will be recomputed and the charges made to the persons’ ledgers.

Flatfee Simplification Filter

When setting the flatfees, you have great granularity. You can set a fee for each level (year), each division, each department, and each campus. If you don’t need that many different fees, you can use this new “filter” option to limit your selection.

For example, if all students on all campus at the same level get the same flatfee for 6 to 12 credits, you turn off the checkboxes for all except Level. If the only difference is division (medical versus engineering versus liberal arts) you can select only Division or Division and Level or whatever combination gives you the granularity you need.

You set the filter in **Systems Flatfee Filter Settings** that gives you Figure 14.

• Figure 14 Flatfee Filter Settings

In this example, only each person’s level (sophomore, junior, etc.) will be used to differentiate flat fees. Put another way, all students on all campuses, all departments and all divisions will be charged the same fee for the specified hours varying only their level.

These settings are obvious when you click Flatfees.

• Figure 15 Flatfee Setting

Figure 15 shows adding a new flatfee. Because of the filter settings in Figure 14, you can pick only Level to differentiate which students this flatfee applies to.

Once you’ve set the filter to exclude certain criteria you cannot “unset” it. So, make sure this simplification is something that you want to use into the future.

Post-to-Billing Date Change

Post To Billing
Year/Semester: 200405/1

Status: Student

Division : Business, College, Daytime, Evening, Fall, Law, Nursing, Seminary, TBD, Winter

Campuses: Asian Campus, Business, Centerville East Campus, Centerville Main Campus, Centerville Medical Campus, Centerville North Campus, Centerville South Campus, College, European Campus, Law, Nursing, Pacific Islands Campus, Seminary

Departments: COM, Day, Eng, Eve, Law, Liberal Arts, Nursing & Allied Health, Sci, Science & Technology, To Be Determined

Levels: 1,2,3,4,5,6

Matches: 20

Preview
No Yes

Posting Date:

• Figure 16 Post to Billing

The date in Post-to-Billing was automatically assigned. Now you can change it on the display to reflect a past or expected date. You access this in the usual way, [Financials Post to Billing](#).

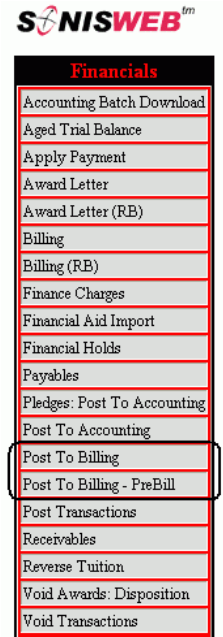
Post-to-Billing Pre-Bill for Anticipated Bills

You register your students for a future semester. You assign them to dorms. You want to give them an anticipated bill so they can plan their finances but you're not ready to post real charges quite yet. Choose [Financials Post to Billing-PreBill](#) in Figure 17 and you go through a special variant of the standard bill preparation process.

SONISWEB[®] prepares the bill as if this is a real bill but it doesn't post charges, set a due date, etc. You print and distribute these anticipated bills. So long as the student doesn't add or drop a course the anticipated bill is the same as the actual bill. You can run [Billing](#) again and again and get the same results. A student who adds or drops courses is removed from the "pre-bill" records, so she or he will be missing the next time you run [Billing](#) for a "pre-bill".

When it's time to post the charges, set a due date, and produce a real bill, you pick [Financials Post to Billing](#). The "pre-bill" records are deleted and the charges are recalculated. You run [Billing](#) and it'll be the same as the "pre-bill" except for those students who changed courses and where you've changed fees between the when you ran [Post to Billing-PreBill](#) and when you run [Post to Billing](#).

Notice that you select [Billing](#) in Figure 17 for both the "pre-bill" and the actual bill. The difference is which [Post to ...](#) you use just before you pick billing.



• Figure 17 Post To Billing and PreBill

Third Party Billing

Billing to a third party is handled just like an award. You set the “award” in Systems Award Codes. The addition of a new code is shown in Figure 18.

• Figure 18 Award as Third Party for Billing

Note the circled “3rd Party Billing” checkbox. It’s used in billing to direct the bill to a named third party.

Program Fee Description Option

What description do you want to appear on the bill and ledger for your Program fees? This enhancement gives you more choices. Use Systems Program Type to access it and add or edit a fee, illustrated in Figure 19.

• Figure 19 Program Fee Description

Here’s how to use the radio buttons:

- ◆ Selecting “Fee Codes” uses the standard financial transaction code (“TCode”) description.
- ◆ Picking “Program Type” uses the program type (name) such as “Classical Piano”.
- ◆ Choosing “Preferred Text” uses the text you entered in Figure 19.

Program Type Levels for Fee Settings

You can set program fees by level, one set for first-year students, different fees for other levels. To do that use Systems Program Type then click the Add button. In place of the edit display in Figure 19, you see a display with Figure 20 where you can choose the level this program type applies to. Note that you can pick more than one level, so you can have one set of fees for Freshman through Junior with a different fee for Seniors.

• Figure 20 Level for Program Type

As you can see in Figure 19, this is where you enter the fees that apply to this program.

Reverse Tuition in Refunding

See “Reverse Tuition in Refunding” on page 23.

More Inclusion and Exclusion Choices for Bills

• Figure 21 Bills with Inclusions and Exclusions

As you see outlined in Figure 21, the billing selection criteria has added options for including and excluding what appears on the bill.

Fee-Affiliation Function

When you set up courses, you assign the per-credit-hour fee using “affiliations” like in-state resident versus out-of-state. The affiliation code you pick is one you set up in a table. However, an authorized person you can modify the charge-amount for a specific course. Keeping track of all the courses and the affiliations and the fees assigned to them can be daunting.

This new function is also an efficient way to change all the fees for courses when your fee structure changes.

With **Systems Fee/Affiliation Utility** you can see them all and change the affiliation fee course settings.

• Figure 22 Fee/Affiliation Utility

Figure 22 shows the utility after you've selected it. Use a radio button to pick the kind of fee or affiliation you want to examine, pick Active or not at the bottom, and then click the Submit button. You'll get a display like Figure 23.

# of Courses	Fee Code	Affiliation Code	Affiliation Fee	
1	Activity Fee	Resident, County	\$150.00	1
1	Book	Resident, County	\$25.00	2
1	Housing	Resident, State	\$100.00	3
2	Lab Fee	Resident, State	\$60.00	4
1	Lab Fee	Senior Citizen	\$100.00	5
1	Tuition	Resident, State	\$30.00	6
1	Tuition	Resident, State	\$100.00	7
1	Tuition	Resident, State	\$200.00	8
1	Tuition	Resident, County	\$45.00	9

• Figure 23 Affiliation Collection

• Figure 24 Default Collection

This gives you an overview of the fees in force. To examine a fee in detail, click its button on the right in Figure 23. You see all the courses assigned for this fee or affiliation and this amount of money as illustrated in Figure 25.

The top of Figure 23 changes to Figure 24 with Default fees since they include Audit, Non-Resident, and CE (continuing education) fees.

Fee/Affiliation Utility
Affiliation Fees

ENG101 English Composition Fee Code: Tuition Affiliation Code: Resident, State Affiliation Fee: 200

Return Reset Submit

• Figure 25 Fee/Affiliation Record

There are two ways to change the amount for one of the rows in Figure 23:

- ◆ Enter the new fee amount in the “Affiliation Fee” field at the top right in Figure 23 or for Default fees, Audit and/or Non-Resident and/or CE in Figure 24. Then click the number-button of the fee(s) you want to change. You’ll get Figure 25 but with all the fees for all the courses changed to the amount you entered in Figure 23 or Figure 24.
- ◆ To change individual courses, click the number button in Figure 23 to get Figure 25. Enter the fee there and click the Submit button. That change is made only to that course.

Whichever method you use, the change has the same effect as directly changing the fee in the Course record.

Course section require an additional display shown in Figure 26.

Fee/Affiliation Utility
Section Fees

Year: 200405 Semester: Fall Update

# of Courses	Fee Code	Section Fee
1	Activity Fee	\$45.00

Return 1

• Figure 26 Section Record

To identify a sections for the fees you select the school year and semester and click the Update button in Figure 26.

Financial Holds

Financial holds let you set balance-sensitive holds. Select **Financials** [Financial Holds](#) to get a standard SONISWEB[®] prompt. You can enter the PID or name of an individual or you can select campuses, levels, departments, etc. to pick those students you want to consider for holds. Once you submit that, you see Figure 27.

The screenshot shows a web interface titled "Financial Holds". It has two main sections: "Create Holds" and "Remove Holds".

Create Holds: A dropdown menu labeled "Hold" is open, showing options: Transcript, Archive, Financial Aid, Financial Registration Hold, Post Transactions, Registration, Roster, and Transcript (highlighted). To the right, there is an input field "Enter Threshold Balance:" with the value "500", a checkbox "Include Financial Aid:" which is unchecked, and a "Create Holds" button.

Remove Holds: Similar to the create section, but the "Enter Threshold Balance:" input field has the value "0", and the "Remove Holds" button is present.

• Figure 27 Financial Holds

Figure 27 is used both to create and to remove holds.

Pick the kind of hold you want to place or remove. Typically it's Registration or the class Roster.

For Create Holds those with balances equal to or greater than the "threshold" balance appear in Figure 28.

For Remove Holds those with balances equal to or less than the "threshold" balance appear in Figure 28.

You can include Financial Aid balances as part of the calculation by clicking its checkbox until a checkmark appears.

Click either the Create or the Remove button to get Figure 28.

The screenshot shows a web interface titled "Financial Holds" with the subtitle "Create 'Registration' Holds". It includes an input field for "Enter Hold Start Date:" with the value "02/08/2006" and a "Memo" field. Below is a table with the following data:

Hold	Name	Charges	Payments	Balance	Financial Aid	Proj. Balance
<input checked="" type="checkbox"/>	Abbott, Edgar (333333334)	\$12,218.58	\$1,015.00	\$11,203.58	N/A	N/A
<input checked="" type="checkbox"/>	Adams, Amy (000000000)	\$14,110.96	\$510.25	\$13,600.71	N/A	N/A
<input checked="" type="checkbox"/>	Adams, Mary (AD4523155)	\$2,850.00	\$375.00	\$2,475.00	N/A	N/A
<input checked="" type="checkbox"/>	Adams, Morticia (312115555)	\$2,215.83	\$0.00	\$2,215.83	N/A	N/A
<input checked="" type="checkbox"/>	Adams, Oscar (111111111)	\$1,338.10	\$200.00	\$1,138.10	N/A	N/A
<input checked="" type="checkbox"/>	Addams, Jane (AD3867728)	\$1,002.50	\$0.00	\$1,002.50	N/A	N/A

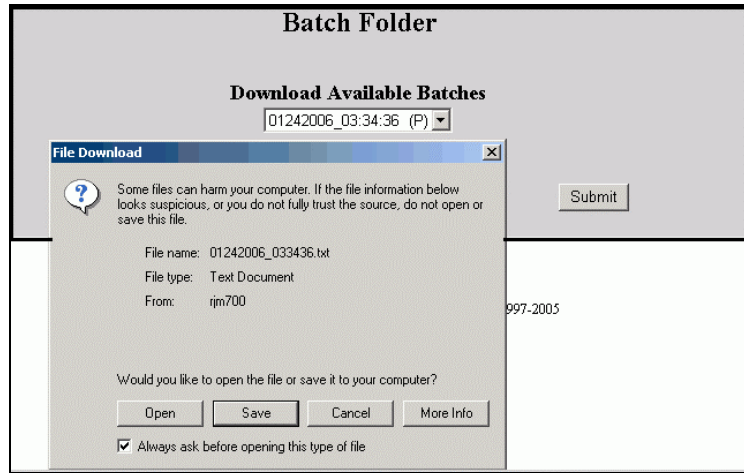
At the bottom of the table are "Process" and "Cancel" buttons.

• Figure 28 List for Create or Remove Holds

Figure 28 is the list of those who met your balance criteria in Figure 27. Clear a checkbox for those you don't want placed on, or removed from, the hold. Once all those to be placed on, or removed from, the hold have checks by their names, click the Process button and the holds are created or removed.

Download Batches

Under **Financials** Batch Download you can download to a file you name the financial transactions you have batched in **Financials** Post to Accounting. That file can then be sent to the accounting department to load the transactions from the file.



• Figure 29 Batch Download Displays

COURSE MANAGEMENT & REGISTRATION

Registration Course Selection Options

Course	Spaces	Wait	Description	Section Session	Cred.	Lead Faculty	Time Desc	Campus
ACCT100	<u>6</u>	0	Accounting Basics	1	3	E. Abbott	MON 3:00pm-5:00pm, WED 3:00pm-5:00pm	To Be Determined

Figure 30 Selection via Spaces

Course	Spaces	Wait	Description	Section Session	Cred.	Lead Faculty	Time Desc	Campus
<u>ACCT100</u>	6	0	Accounting Basics	1	3	E. Abbott	MON 3:00pm-5:00pm, WED 3:00pm-5:00pm	To Be Determined

• Figure 31 Selection via Course Code

Course	Wait	Description	Section	Session	Cred.	Lead Faculty	Time Desc	Campus
CHI 102	<u>Enroll Now</u>	0	Chinese 102	1	3.55	P. Benson	MON 8:00am-10:00am, WED 8:00am-10:00am	To Be Determined
CSC110	<u>Full</u>	0	Keyboarding	1	1	2 E. Algonican	TU 9:30am-11 am, TH 9am-11 am	Centerville Main Cam

• Figure 32 Selection via Words in a Student Display

Figure 30 shows that the underlined selection link for a course section is “Spaces”. In Figure 31 it has been changed to the Course. Figure 32 shows the use of words for selection, this from a student-access display. You pick which one to use in **Systems Web Options**. You see it in Figure 33.

Registration Settings

Basic Registration Post to Billing

Maximum Rows Displayed (Regist. Only)

Maximum Number of Credits Allowed (Regist. Only)

Registration Year Registration Semester

Use Campus Limitations

Registration Cart Timeout In Minutes (minimum 5):

Maximum Number of Waitlist Items Per User

Registration Link

Seats (count) Seats (message) Course Available Message (link) Not-available Message

• Figure 33 Web Options Registration Page Setting

As Figure 33 shows you have three choices:

Seats (count) means the number under “Spaces” is underlined as the selector as in Figure 30.

Message means that the two messages to the right are used in place of “Spaces” and the appropriate message is underlined as the selector, shown in Figure 32.

Course means the course code is underlined as the selector, seen in Figure 31.

Move Students to Another Course Section: Bulk Roster Move

You have a couple of course sections set for the same course. Neither of them has enough students enrolled to make a full class. You decide to consolidate them. With “Bulk Roster Move” it’s pretty simple.

Use **Courses** to find the course, use **Section List** to find the section you want to eliminate, and then you click **Bulk Roster Move**. That yields Figure 34.

Bulk Roster Move					
Yr: 200405	Sem: Fall	Lead: Edgar Abbott	Spaces: 10	Sec: 1	Campus: To Be Determined
Select Course Section to move selected students to			ACCT100 :2 (8 spaces available) ▲ ACCT100 :3 (7 spaces available) ▲ ACCT100 :4 (10 spaces available) ▼		
Move	Student				
1 <input checked="" type="checkbox"/>	Abbott, Edgar M (333333334)				
2 <input checked="" type="checkbox"/>	Arnold, Jane (AR1833324)				
3 <input checked="" type="checkbox"/>	Bartelby, Bob (BA8285589)				
4 <input checked="" type="checkbox"/>	Black, Jack (BL4712133)				
5 <input checked="" type="checkbox"/>	Carroll, may (CA6899692)				
6 <input checked="" type="checkbox"/>	Gordon, Flash (GO5151246)				
7 <input checked="" type="checkbox"/>	Refund, Ronnie Jimbo (RE5233040)				
<input type="button" value="Reset"/>			<input type="button" value="Submit"/>		

• Figure 34 Bulk Roster Move

First you pick the section you want to move the students to. Notice that you see the section number and the available spaces. Next you use the checkbox by each name to decide which students to move to the section you selected. A checkmark means move that student to that section. No checkmark means hold this student to move to a different section. Click the Submit button.

If you changed some of the checkboxes to blank, after submitting, you see Figure 34 again with the remaining students so you can assign them to another section. Figure 34 keeps reappearing until you’ve moved all the students.

Bulk Roster Move					
Yr: 200405	Sem: Fall	Lead: Edgar Abbott	Spaces: 10	Sec: 1	Campus: To Be Determined
No students in the selected course section.					

• Figure 35 Completion of the Bulk Roster Move

You know you’ve moved all the students when you see the display in Figure 35.

Official-Grade Change Archiving

Most schools let authorized people change the grades. Once the grade has been made official, this new archive feature tracks the change, who made the change, and when it was made.

This is an option in **Systems Web Options** where you set it on and off. You see it in Figure 36.



• Figure 36 Web Option to Archive

When an authorized person changes a grade, you see the grade-change history as shown in Figure 37.

Courses									
ART101 course.									
The changes you are making are as follows: The grade is changing from I to F.									
Official grade changes and who made them are archived for possible later review.									
Official Changes Already Made to This Grade (* - unchanged)									
Administrator	Changed	Previous Official Grade Setting	Changed Official Grade Setting	Previous Grade	Changed Grade	Previous Mid-term Grade	Changed Mid-term Grade	Previous Clinical Grade	Changed Clinical Grade
Adams, Amy superl	01/19/2006 - 1:34 PM	*	*	WP	I	*	*	*	*
<input type="button" value="Return"/>					<input type="button" value="Submit"/>				

• Figure 37 Grade Change Archive Display

The information archived is:

- ◆ Who made each change and when she or he made it.
- ◆ Whether or not the “Official Grade” setting was turned on or off.
- ◆ The previous and new grades.

This history tracks all the grades – course, midterm, and clinical – after the Official checkbox has been set on. As long as the grades are not official, they can be changed and no archive is kept.

Once Official, Clinical and Midterm Grades Treated Like Course Grade

Once the grades have been made official, changes to any grade are archived in the same way as the course grade as described in “Official-Grade Change Archiving” above.

Transfer Course Institution Filter

You may have several “English 101” courses from several institutions that you can select for transfer into your institution. As Figure 38 shows, you can use a pulldown to find the course by institution.

In Figure 38 you enter as much of the course code as you know and, optionally, you select the institution from the pulldown at the bottom. That keeps you from going through several displays of “English 101” to find the one you want.

The screenshot shows a web interface titled "Transfer Registration". At the top, it displays "Current Transfer Courses" with a table showing "Cred." and "Institution" columns, and "Total Transfer Credits: 0". Below this is a "Transfer Course Search" section with a "Course" input field, an "Institution" pulldown menu, a "Reset" button, and a "Search" button.

• Figure 38 Transfer Course Institution Filter

Course Equivalent Institution Information

Course Search					
Record 1 - 2 of 2	Course	Description	Active	Transfer	Institution
	PED 101	Physical Fitness	Y	N	Chatham County Community College
	PED 101	Physical Fitness	Y	N	North Carolina School of Cosmetology

• Figure 39 Courses from Affiliated Institutions

Equivalent courses might be taught by one or more allied schools. This addition lets you note the institution so you can keep track of otherwise identical courses. Figure 39 shows what it looks like on a course listing.

When you add a new course, you have a pulldown institution setting like that in Figure 40.

The screenshot shows a form titled "Course: Add". It features a pulldown menu for "Institution" with three options: "Chatham County Community College", "Chatham County Community College", and "North Carolina School of Cosmetology".

• Figure 40 Affiliated Institutions

The screenshot shows a form titled "Institution: Add / Edit". It includes a note: "Note: Adding Institution To System Institution Table." Below the note is an "Institution" input field containing "Chatham County Community College" and an "Affiliated" checkbox which is checked.

• Figure 41 Institution Affiliation Setting

You set up the affiliation in **Systems** [Institution: Add/Edit](#). With it you search for or add an institution. You see an “Affiliated” checkbox shown in Figure 41 that lets you specify it as affiliated with the checkbox. Then you can put their courses in your course catalog and have it appear in lists like Figure 39.

In order to set up a course section for an affiliated campus, you should define the campus, building and rooms as outlined in “Course Sections on the Campus of an Affiliated School” below.

Course Sections on the Campus of an Affiliated School

It’s not really new in version 2.0, but it’s an option to “Course Equivalent Institution Information” above. If it’s your course but taught on the campus of an affiliated school, you can set up the Campus, Building, and Room(s) for that location and assign it when a course sections is added. They are

established using **Systems** then selecting from the function list **Campuses** followed by **Rooms and Buildings**.

Reverse Tuition in Refunding

Refunding the tuition for a withdrawn course gets complex when the course was charged based on a flatfee. Here's how it works: if there's a flatfee involved and if it hits a refund setting and if "Reverse Tuition Request" is checked (Figure 44), you will be asked if you want to do a reverse tuition or a refund. If "Reverse Tuition Request" is not checked (Figure 44) you only get a refund display; you will not be offered reverse tuition.

To compute the refund, you need to set up the parameters in a similar way to flatfees described on page 11. Use **Systems Refund Filter Settings** to set the criteria as shown in Figure 42.

• Figure 42 Refund Filter Settings

You may offer the same refund percentages to everyone or you may want them to be the same as those in the **Flatfee Filter Settings** shown in Figure 14.

With the filter set, you go to **Systems Refund Settings** to get Figure 43.

Refund	Level	Division	Campus	Dept.	Fee Codes	Min. Days	Max. Days	Percentage
Refund 1st_year	Freshman	OFF	OFF	OFF	QQ	0	14	85.00%
Refund 2nd_year	Sophomore	OFF	OFF	OFF	QQ	0	7	90.00%

• Figure 43 Refund Settings List

You can Add a new refund definition that appears like Figure 44.

• Figure 44 Refund Setting

In Figure 44 you name the refund. If you have set it for criteria in Figure 42, you'll have those selections as you see in "Level". Note that Department, Campus, and Division have been turned off by Figure 42. You pick the financial transaction "Fee Codes" that apply.

Then you choose the minimum and maximum days and the percentage refund. For example, a withdrawal between 0 and 14 days after enrollment gets an 85% refund. With the data entered, you click the Save button.

With the "Reverse Tuition Request" checkbox checked in Figure 44 you are offered reverse tuition when the course is withdrawn. With the "Reverse Tuition Request" checkbox blank you are offered only the refund display.

Once you've set Figure 44 and see the list in Figure 43, you click it and get the editable version with an "ADD Affiliation" button. Click the button and you get Figure 46.

• Figure 45 Affiliations

In Figure 46 you give a different percentage refund to students with different affiliations such as in-state resident.

The refund percentage in Figure 44 is the default for those not meeting the Affiliation settings in Figure 46.

Where reverse tuition is against flat fees yet the student continues to be enrolled in one or more courses, a member of your staff needs to compute how much the student still owes and have that posted to the student's account.

• Figure 46 Affiliation Percentage in Refund Settings

Registration Detection of Same Course in Same Semester and Session

The registration conflict detection prevents a person from registering for two sections of the same course within a semester and, where it applies, session¹.

¹ As session is a time period within a semester where courses or seminars are scheduled that don't require the full semester.

Registration of Same Course in Different Sessions

A student can register for the same course in the same semester if they're in different sessions¹. So, for example, a student can register for two seminars with the same name but taught in two different sessions within the same semester. The system will still check for time and day conflicts as usual.

Course Section Program and Level Restriction

You can set a course so that it restricts registration to those in a specific program and/or a specific level. You set an expiration date so that after that date the restriction is lifted. That ensures that person's at a level or in a program who must have that course get the first shot at registering for it.

Use **Courses** to select the course then **Section List** (or **Section Add**) to get the section record, a portion of which is shown in Figure 47.

Restrictions			
Program	Marine Electrical & Mechanical - AD	Program Deadline	01/16/2006
Level	Senior	Level Deadline	01/09/2006

• Figure 47 Program and Level Restrictions

Fee-Affiliation Function

See “Fee-Affiliation Function” on page 14.

Withdrawn Student Grade Assignment

Make Withdrawn Courses Official:	<input checked="" type="checkbox"/>	Withdrawn Course Official Grade:	I
----------------------------------	-------------------------------------	----------------------------------	---

• Figure 48 Web Options Grade Setting for Withdrawn Students

In **Systems Web Options** you can set the final grade that all withdrawn students will be given when you post a withdrawal leave of absence for a student. Later you can go to a specific student's Courses records and change the grade if you wish. You see the on-off checkbox and the grade that will be given in Figure 48.

Exclude-Faculty Option in the Grades Table

Table Maintenance - grades												
ADD New Record		OR Edit Record (click on Button in the row): Sort Order										
Disabled	Exclude Faculty	Grade	High	Incomplete grade	Low	No Repeat Grade	Not in GPA	Pass-Fail	Passing grades	Points	Repeat grade	Uncounted credits
(disabled)	(excl_fac)	(grade)	(high)	(incomp_grd)	(low)	(no_rpt_grd)	(notin_gpa)	(pf)	(passing)	(points)	(repeat_grd)	(nocnt_cred)
0	0		0	0	0	0	0	1	0	0.00	0	0
0	0	A	100	0	93	0	0	0	1	4.00	0	0
0	1	I	0	1	0	0	0	0	0	1.00	0	0

• Figure 49 Exclude Faculty Setting in Grades Table

You may have some grades that can only be given by a dean or other authorized person. A new option in the **Grades** table (under **Systems**) lets you enforce the option by preventing faculty members from selecting the grades. For the grade of “I” in Figure 49, note the 1 under “Exclude Faculty”.

A faculty member who has an ID and password for administrator access can give this grade if the security profile you assigned her or him permits it. Under standard faculty access, he or she cannot assign that grade.

Faculty-Assigned Scores Available to Administrators

Faculty members set up a weighting scale for a course, assign scores for elements such as tests and homework, and the grade gets computed automatically. Before version 2.0 on the faculty member could see the scores.

Now an authorized administrator can see the scores assigned by the instructor.

Repeated Courses: Best Grade Rather Than Last Grade

For courses repeated, many schools apply the grade of the last repeat of a course to use in the transcript. This option changes that by choosing the best grade in all the repeated courses.

DEVELOPMENT & FUND RAISING

Constituent Information Record and Supporting Tables

New tables let you keep additional information about your constituents. Key to that is the new Constituent Information record shown in Figure 50.

• Figure 50 Constituent Information Record

There are standard tables and pulldowns in Figure 50 for rating, giving level, the staff fundraiser responsible, and the type of constituent. The tables are set up by an authorized person in **Systems**.

Licenses-Certificates and Interests Added to Constituent Records

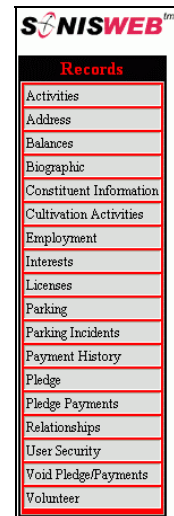
Keeping track of Constituents includes knowing what their interests are and what licenses and/or certificates they hold. Those records are now part of the standard set for constituents. Figure 51 show the list of records kept for Constituents.

User-Security Added to Constituent Records

Some Constituents volunteer for tasks that requires them to have limited administrator rights to SONISWEB®. The User-Security record is now available for constituents so you can assign them User-IDs and passwords for a security profile and give them access to the system. See Figure 51.

Check Number on the Displays and Reports

“The payment was my check number 3546. Did you get it?” That call from a constituent is easier to answer since you have the option of entering the check number into the Pledge Payment record when you receive it. It now appears on most payment-related displays and reports.



• Figure 51 Constituent Records

Pledge, Event, and Fund Codes More Tightly Connected

The tables for pledges, events, and the applicable fund-codes are now part of setting up a Pledge record (Figure 51).

• Figure 52 Pledge Record

As Figure 52 illustrates, you can be specific about the event and fund for this pledge. When you receive a pledge payment or one-time gift, you have similar selections when you enter that payment so it goes to the right place. Constituent record displays such as Balances and Payment History (Figure 51) as well as pledge-related reports also show this information.

Fund Mapping to Accounting

To simplify sending information to accounting, the new Pledge TCodes Mappings under Systems lets you specify the accounts and the codes needed by your accounting staff.

• Figure 53 Pledge TCodes Mapping Entry

Figure 53 illustrates it for one payment code.

EMPLOYMENT AND CAREER GUIDANCE: JOB POSTING

You've seen the bulletin boards around the college with available jobs posted. This new SONISWEB® function provides a simple electronic way to connect employers with students and alums and to get the application process started. Besides post-graduate placement, employers can post jobs for the summer and for students attending school..

You set up the employers with a "Primary Contact" and giving her or him a PID and PIN. Once the primary contact is in the system, you're done with it. The Primary Contact enters the other contacts and posts their jobs (page 33).

Employer Records

Setting up the first key contact is done in **Systems Employer**. It's the list you see in Figure 54.

Employer								
Employer	Primary Contact	Title	City	State	Work Phone	Electronic Mail	Disabled Employer.	Disabled Prime
<u>Bob's builders</u>	Painter, B.	President	Utica	NY	919-999-2222	Contact	N	N
<u>Enron</u>	Johnson, J.	President	St Cathines	FC	856-555-1212	Contact	N	N
<u>Halliburton</u>	Cheney, R.	Chairman Emeritus	Washington	DC	n/a	Contact	N	N
<u>United Airlines Lines</u>	Emmons, M.	CEO	Woodbury	CT	203-263-4744	Contact	N	N
<u>Wannemakers Fine Foods</u>	Moore, R.	Engineer	Baltimore	MD	410-555-121-	Contact	N	N

• Figure 54 Employer List

Click the underlined [Contact](#) link under "Electronic Mail" and your e-mail software² begins a note with the e-mail address of the key contact in the header.

Click the underlined name of the "Employer" to see the records as shown in Figure 55.

Employer					
Employer	<input type="text" value="Wannemakers Fine Foods"/>			Disabled	<input type="checkbox"/>
Primary Contact					
Last	<input type="text" value="Moore"/>	First	<input type="text" value="Rodney"/>	MI	<input type="text"/>
Title	<input type="text" value="Engineer"/>	PID	<input type="text" value="un53n772j"/>	PIN	Change
Work Phone	<input type="text" value="410-555-121-"/>	Ext.	<input type="text"/>	Fax	<input type="text" value="410-555-1011"/>
Electronic Mail	<input type="text" value="RMoore@WFF.com"/>			Cell Phone	<input type="text" value="410-555-1010"/>
Street Address	<input type="text" value="10512 W. Sagamore Rd"/>	Street Address	<input type="text" value="Suite 701"/>	Street Cont.	<input type="text"/>
City	<input type="text" value="Baltimore"/>	State	<input type="text" value="Maryland"/>	Zipcode	<input type="text" value="21201"/>
County Code	<input type="text"/>	Country	<input type="text" value="U.S.A."/>		
List Contacts			Change Primary Contact To <input type="text" value="Moore, Rodney"/>		
<input type="button" value="Reset"/>			<input type="button" value="Submit"/>		

• Figure 55 Employer Record

² Unless your e-mail system doesn't permit it.

Click [List Contacts](#) in Figure 55 to see the others in the list for that employer. The list of contacts is established as described in “Employer Access” below. The “Change Primary Contact To” pulldown lets you pick another person in the contact list as the primary contact. That causes the name and [Contact](#) link in Figure 54 to change.

Click the Add button in Figure 54 to enter a new employer.

The display looks like Figure 55 except there’s a place to enter a PID and PIN so that the employer’s primary contact can log on to SONISWEB®.

PID	<input type="text"/>	PIN	<input type="text"/>
------------	----------------------	------------	----------------------

• Figure 56 Employer PID and PIN

You’ll also want to set up the job classes based on what your employers need. You do that in [Systems Table Maintenance](#) choosing the Job Class table. It looks like Figure 57.

Employers use these job classes in a pulldown menu as they post jobs.

In Figure 57 you can use the Add button for a new class or click the “Job Class Code” button and change it. You can change the “Job Class” words, disable one you don’t want used, or, if the class has never been used, you can delete it.

Table Maintenance - <i>job_class</i>		
<input type="button" value="ADD New Record"/>	OR Edit Record (click on Button in the row): Sort Order	
Job Class Code	Disabled	Job Class
(job_class_cod)	(disabled)	(job_class_txt)
<input type="button" value="CL"/>	0	Clerical
<input type="button" value="GN"/>	0	General
<input type="button" value="PR"/>	0	Professional
<input type="button" value="TC"/>	0	Technical

• Figure 57 Job Class Table

Employer Access

The SONISWEB[®] opening display has a “For Employers” link. It presents a security display for entering the contact’s PIN and PID set when the record was created in Figure 55. The logon leads to Figure 58

The changes made in Figure 55 are also available to the employer contact in Figure 58.

Click the Job Listings tab to show them and to add new listings. Figure 59 is an example.

Clicking an underlined job Title in Figure 59 brings a display giving the duties, pay, hours, location, etc. The underlined items give these displays:

Title for the details on the job as shown in Figure 60.

Contact starts an e-mail session with the contact.

Applicants displays a list of those who have applied.

Clicking Add button in Figure 59 gives a blank version of Figure 60. Fill in the information, click the Submit button and it’ll appear in Figure 59 the next time you see it. A checkmark in the Disabled checkbox causes the job to not be seen or selectable. If the job has never been used via an application, etc., the Delete button is used to delete it. (Only the “Primary Contact” sees the entire list of jobs. Other contacts for this employer see only those jobs connected to him or her.)

Expiration Date in Figure 60 is optional but is good way for an employer to keep its job listing

• Figure 58 Employer Access Display

Your Listings					
No.	Title	Contact	Location	Apply By	Posted Disabled Applicants
10	<u>Cleaner</u>	<u>Moore, R.</u>	Wilhelm, MI	02/01/06	Y N 1

Other Listings					
No.	Title	Contact	Location	Apply By	Posted Disabled Applicants
11	<u>Clerk III</u>	<u>Jones, M.</u>	Mt. Joy, MT	01/30/06	Y N 0
7	<u>Meat Cutter</u>	<u>Jefferson, G.</u>	Waterbury, CT	01/01/07	Y N 1

• Figure 59 Job Listings

• Figure 60 New Job Posting

from becoming stale with old job. After the “Expiration Date”, the job will not appear in the applicant listings like Figure 61 and Figure 62.

Posted checkbox: an employer can enter a job and delay its formal posting. Just leave the “Posted” checkbox, circled in Figure 60, blank and the description will be saved for later use. It won’t be visible to students and alums. When the employer is ready to post the job, it’s picked in Figure 59, a checkmark put in the Posted checkbox and the Submit button selected. It now become visible in the list of available jobs.

Click the Contacts tab and for a list of current contacts for the employer and an Add button to insert new contacts. Like Figure 58 the employer contact can change everything but the PID.

Job Applicant Access



Students and Alums can search for available jobs from their SONISWEB® access.

After logging on, he or she clicks the Jobs icon near the top of the display.

The Job Search display, illustrated in Figure 61, provides several ways to search those employers created in “Employer Records” above. Included is a list of jobs and employers listed in the system.

The “Desired Salary” in Figure 61 is the minimum the person is interested in.

• Figure 61 Jobs Search

Based on what she or he chooses in Figure 61, a matching-job list appears as shown in Figure 62.

Click an underlined Title in Figure 62 and the job detail record is displayed, Figure 63.

No.	Title	Employer	Job Class	Location	Salary Range
9	<u>Flight Attendant</u>	United Airlines Lines	General	Chicago, IL	\$0.00 - \$0.00
8	<u>Pilot</u>	United Airlines Lines	General	New York, NY	\$0.00 - \$0.00

• Figure 62 Matching Jobs

From this display, the person can call the contact or click the underlined “Electronic Mail” link to send an e-mail note or click the “Apply for This Job” button.

The “Apply...” button leads to Figure 64.

• Figure 63 Job Detail

In Figure 64 the applicant enters some basic information, clicks the Submit button and the contact for the job gets an e-mail reminder that a new application has been submitted.

At the bottom the applicant is reminded to send more complete information to the employer's contact via e-mail.

After entering the application, the applicant can view it as shown in Figure 65. There are fields at the bottom to make notes on contacts and dates so the applicant can keep a record online.

Clicking [View Application](#) in Figure 65 yields Figure 66.

Logout	Bio	Schedule	Registration	Degree Audit
Applying For the Job				
Employer United Airlines Lines (Job # 9)				
Title	Flight Attendant	Location	Chicago, IL	
Description	Weekend Flight Attendant			
Contact	Maureen Emmons	Electronic Mail	emmons100@yahoo.com	
Availability Date	<input type="text" value="06/15/2006"/>	Telephone	<input type="text" value="919-555-1212"/>	
Electronic Mail	<input type="text" value="jharlow@rjmu.edu"/>			
Best Time To Contact	<input type="text" value="Evenings after about 6:30pm"/>			
Introduction	<input type="text" value="I'm trained and experienced as this is my summer employment while attending college"/>			
Training/Skills	<input type="text" value="Two summers with contract long haul carrier"/>			
<i>Be sure to email your cover letter to the contact above, including an attached resumé.</i>				
<input type="button" value="Reset"/>		<input type="button" value="Submit"/>		

• Figure 64 Entering Application Information

Logout	Bio	Schedule	Registration	Degree Audit
Employer United Airlines Lines (Job # 9)				
Title	Flight Attendant	Description	Weekend Flight Attendant	
Fulltime	Yes	Job Class	General	
Location	Chicago, IL			
Salary	0 - 0			
Apply By	01/01/2005	Start Date	02/01/2005	
Expiration Date				
Contact	Maureen C Emmons	Electronic Mail	emmons100@yahoo.com	
Work Phone	203-263-4744	Ext.		
Fax	203-263-6765			
Duties				
Requirements	APPLIED			
App. Date	01/30/2006	Contacted	<input type="text"/>	
First Interview	<input type="text"/>	Follow-up Interview	<input type="text"/>	
View Application				
<input type="button" value="Reset"/>		<input type="button" value="Update"/>		

• Figure 65 Reviewing the Application

Job Application	
Title	Flight Attendant (Job # 9)
Employer	United Airlines Lines
App. Date	01/30/2006
Availability Date	06/15/2006
Telephone	919-555-1212
Electronic Mail	jharlow@rjmu.edu
Best Time To Contact	Evenings after about 6:30pm
Introduction	I'm trained and experienced as this is my summer employment while attending college
Training/Skills	Two summers with contract long haul carrier
<input type="button" value="Print"/> <input type="button" value="Close Window"/>	

• Figure 66 Job Application Information

Employer Report

Under **Reports** the Employer Overview (RB) report collects all the employer information together on one report.

01/30/2006	04:44:01 PM	Employer Overview						Page 3 of 3
(Click on the Number of Jobs To See More Job Information)								
Wannemakers Fine Foods	Employer No.7	Enabled:		Yes				
Contact	ID	Title	Telephone	Email	Location	Enabled	Jobs	
Moore, Rodney (primary)	17	Engineer	410-555-1212	RMoore@WFF.com	Baltimore, MD 21201	Yes	3	
Emmons, Maureen	22	Programmer	203-263-7766	em@sonis.com	Woodbury, CT 06798	Yes	0	
Jefferson, George	14	President	800-555-1212	GJeff@WFF.com	Baltimore, MD 21201	Yes	1	
Jones, Mary	18	Teacher	800-555-1212	MJonesT@WFF.com	Baltimore, MD 21201	Yes	1	
Rogers, Alice	16		800-555-1212	ACRogers@WFF.com	Baltimore, MD 21201	Yes	0	
						Total Jobs:	5	
						Total Applications:	2	
						Grand Total Jobs:	25	
						Grand Total Applications:	13	

• Figure 67 Employer Overview Report

Figure 67 shows an example. Clicking a “Jobs” number in Figure 67 gives you a list of the jobs for this employer contact.

ENROLLMENT MANAGEMENT

Exports for Enrollment by Date

Main Report Generator
Building: Enrollment By Date (RB)

Select Campus (s)

- Centerville East Campus
- Centerville Main Campus
- Centerville Medical Campus

Select Division (s)

- College
- Daytime
- Evening

Select department(s)

- Nursing & Allied Health
- Sci
- Science & Technology

Select school year(s)

- 200405
- 200304

Select semester(s)

- Fall
- Fall - 1a
- Fall - 1b

Select level(s)

- Masters
- PHD
- Not Applicable

PDF Excel Flash Paper

Clear Name

Reset to Defaults

Build Report

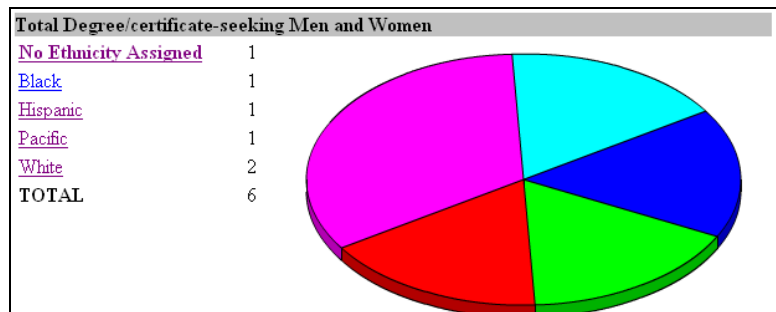
• Figure 68 Report Choices

Thanks to the new Report Builder (see page 50), this report can be displayed as before or it can be exported as an Adobe® PDF or Excel spreadsheet file. You see those choices circled near the bottom of Figure 68. The PDF is useful to send to others in the staff as an e-mail attachment. The spreadsheet file is good for further analysis.

Enrollment Detail Report Drill-down Enhancements

This report is used for IPEDS³ report preparation and for other government reporting. It's also useful for finding anomalies with student records.

As Figure 69 shows, it's graphical with the addition of underlined links. So if you see a count for students without gender or ethnic entries, click the underlined item and you see the names so you can correct the student's records.



• Figure 69 A Portion of an Enrollment Detail Report

³ Integrated Postsecondary Education Data System from the U S federal government.

FACULTY FUNCTIONS

Registration Display

See “Registration Course Selection Option” on page 19.

Session Display for Courses

Sessions – those shorter periods within a semester – now appear on the course display for courses that use them. An example is circled in Figure 70.


Gradebook Drop-Lowest-Grades Enhancement

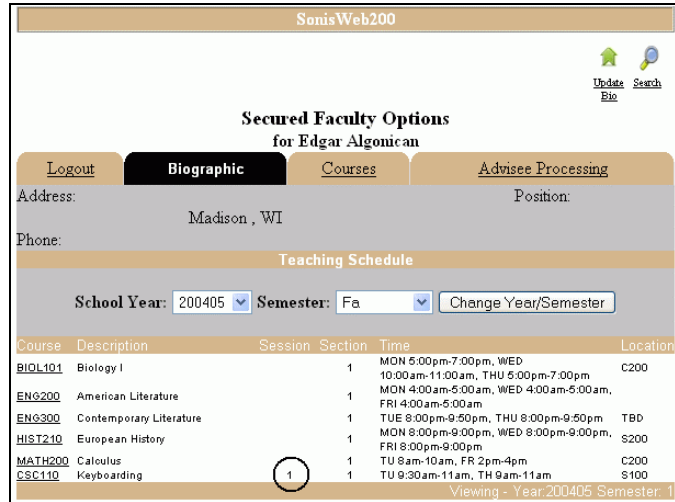
An option for faculty members is to drop the lowest grades for a course.

Deleting Scores in Gradebook

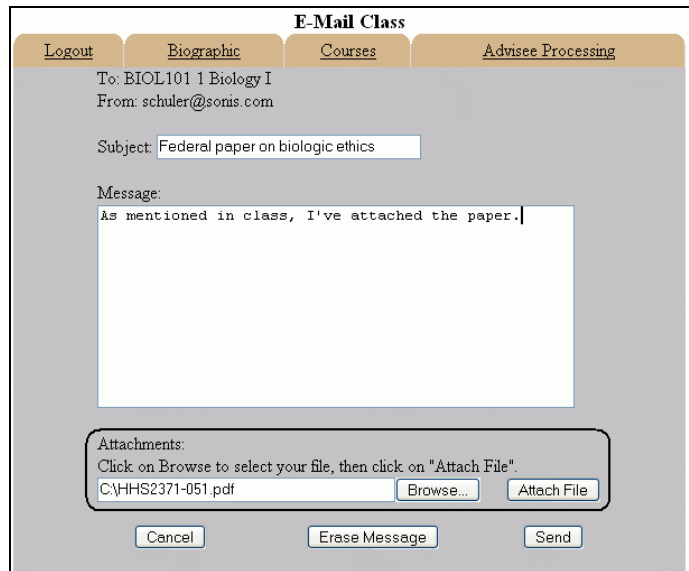
Faculty members can delete scores of the course sections they teach.

Attachment with an E-Mail Note

 Sending a e-mail message to the entire class has long been a part of SONISWEB®. Attaching a file to it is new. As Figure 71 shows, you enter the name of your file or use the Browse button to find it. Click the Attach button then Send the note. Of course, that requires that your e-mail system permits attachments.



• Figure 70 Session Display



• Figure 71 E-Mail Note to Class with Attachment

Textbook Details



Textbooks are often assigned to the master Course record by the Registrar or other authorized administrator on recommendation by the faculty.

Faculty have three new facilities for textbooks. A faculty member can find a book using search (Figure 73) and then click the underlined book title to see the detailed description. That's shown in Figure 72. That detailed display comes from doing a book search and then clicking on the underlined name of the book as shown in Figure 74 and Figure 75.

If the faculty member added the book, he or she gets Figure 74 instead where the entry can be edited. If the book was added by someone else, the faculty member can only see the description, Figure 73.

Course Section Books			
Logout	Biographic	Courses	Advisee Processing
Title	Physiology of Mammals and other Vertebrates	Publication Year	1980
Author Last Name	Marshall	Author First Name	P. T.
Edition	Paperback	ISBN	0521226333
Price	99.00		
Memo			

• Figure 72 Textbook Details

In addition, a faculty member can assign a book to the section he or she is teaching and/or add a new textbook to the bibliography as described in “Textbook Additions by Faculty” below.

Textbook Additions by Faculty



Adding textbooks has been a part of the Course set up process but available only to those with administrator **Systems** access. Now faculty can assign textbooks to a course section and add textbooks to the system-wide bibliography.

To use it, click the Books icon and search by entering the ISBN or as much as you know of the title and/or author then click the Submit button.

If you don't find it, click the Add button in Figure 73 to get Figure 74. Enter the book information and click the Submit button. That adds the book to the system so it can be assigned to classes.

To assign it to this section, do the search again (Figure 73) and when it appears, click the Add checkbox in Figure 75 until a checkmark appears. It's circled in Figure 75. Next click the Submit button. The book is assigned and students will see it on their SONISWEB® schedule display when they click their "Books" icon.

This assigns the textbook to this section only. If it should be assigned to all sections of this course, have your Registrar or other authorized administrator add it to the master Course record.

• Figure 73 Searching for a Textbook

• Figure 74 Entering a New Textbook

• Figure 75 Assigning a Textbook to a Section

FINANCIAL AID

Enrolled Hours in Financial Aid Record

From Names Financial Aid you see a record like Figure 76.

Williams, Billy (Student - WI3647496)						
Financial Aid						
School Year 200405	Budget 37,500.00	Adjustment 0.00	Loan Fees 235.00	Estimated Family Contribution 8,500.00	Adjusted Gross Income 25,000.00	
<input type="button" value="Add"/>						
Satisfactory Academic Progress						
School Year 200405	Semester 1	Good Standing Yes	Enroll Status			
Memo						
<input type="button" value="Reset"/>				<input type="button" value="Submit"/>		

• Figure 76 Financial Aid Record

When you click the Add button you can add a financial aid record like that shown in Figure 77. Circled at the bottom right in Figure 77 are the enrolled hours.

Dependency Status and Housing Status Added

Williams, Billy (Student - WI3647496)

Financial Aid

School Year	200405	Adjustment	0.0000
Budget	37500.0000	Estimated Family Contribution	8500.0000
Loan Fees	235.0000	Veteran	No
Adjusted Gross Income	25000.0000	Dependency Status	Dependent
Housing Status	<div style="border: 1px solid black; padding: 2px;">On Campus Unspecified On Campus Off Campus With Parents/Guardian</div>	<input type="button" value="Submit"/>	

Enrollment Hours 9

Semester
Fall

• Figure 77 Add a Financial Aid Record

Click the Add button or the underlined school year in Figure 76 for the financial aid budgeting display for a student. It has entries for housing and dependency as shown in Figure 77.

Fund Allocation and Balance in Awards

As you make awards, the allocation and balance status of the award funding are shown so you don't accidentally over-allocate the funds available. After you've established a budget for a student (Figure 77) you see the school year information in Figure 76. Click the underlined school year and you get a display with additional choices as illustrated in Figure 78.

Financial Aid

Williams, Billy (Student - WI3647496)

School Year: 200405

Budget: 37500.0000

Loan Fees: 235.0000

Adjusted Gross Income: 25000.0000

Housing Status: On Campus

Adjustment: 0.0000

Estimated Family Contribution: 8500.0000

Veteran: No

Dependency Status: Dependent

Reset Submit Delete

Enrollment Hours

Semester: Fall 9

[Projected Enrollment](#)

[Adjusting Award](#)

[Accept/Reject Award](#)

No EDEExpress Information Available

• Figure 78 Editing the Financial Aid Record

Click [Adjusting Award](#) to see Figure 79 where you pick the award you wish to add or change using the pulldown list. (The awards are set up using [Systems Award Codes](#).)

Financial Aid

Williams, Billy (Student - WI3647496)

Select semester(s)

Fall

Fall - 1a

Select award(s)

Smith Memorial Scholarship

My Pell

NCAA

Pell Award

Presidential Scholarship

Smith Memorial Scholarship

Reset Submit

• Figure 79 Choosing an Award

With the award chosen in Figure 79, you click the Submit button to get Figure 80.

Financial Aid					
Allocation:	<input type="text" value="150000.00"/>	Previous:	<input type="text" value="26600.00"/>	In Process:	<input type="text" value="26600.00"/>
School Year	<input type="text" value="200405"/>	Semester	<input type="text" value="1"/>	Remaining:	<input type="text" value="118900"/>
Type	<input type="text" value="Smith Memorial Scholarship"/>	Check No.	<input type="text"/>		
Amount	<input type="text" value="4500"/>				
<input type="button" value="Reset"/>		<input type="button" value="Preview"/>			

• Figure 80 Award and Fund Balance

As you enter or change the award Amount in Figure 80, you see at the top the status of the award funds so you don't award more than is available for it.

The Award Summary report also shows the allocation and balance amounts.

More Student Information from EDEExpress

The U S Department of Education EDEExpress system changes from year to year. The interface between SONISWEB® and EDEExpress has been changed so as be less dependent on the annual EDEExpress changes. The change is you use your U S Department of Education (DOE) authorization to download the EDEExpress database for your school to the SONISWEB® server. Then you can click the EDEExpress link on the student's Financial Aid record and see the data in the DOE database.

Veteran Status Shown on Financial Aid Record

The Veteran status is set and shown on each person's Biographic record. Because you sometimes need to know that as you're filling in the Financial Aid record, the veteran status on the biographic record also appears on the Financial Aid record as "Yes" or "No". It's shown in Figure 77. You must go back to the biographic record if you want to change it.

GOVERNMENT AND SUPPORT ORGANIZATIONS

IPEDS Enrollment Report

The IPEDS³ report is built up from key statistics about your student body. The core information is described in “Enrollment Detail Report Drill-down Enhancements” on page 36.

IRS 1098T Box 6 Function

• Figure 81 Box 6 Indicator in Calendar Year Table

If you need to use Box 6 on the 1098T form to show payments or charges in one calendar year that apply to the next, you can set that using **Systems Table Maintenance** for the Calendar Year table so it will be properly set on the 1098T file you send to the IRS. Figure 81 shows the new indicator box in the calendar year table.

IRS 1098T Halftime Hours

• Figure 82 Build Selections⁴

In the Build step for the 1098T process, you can specify how many hours are considered halftime in your institution as illustrated in Figure 82. That assures correct entries on the 1098T file you send to the IRS.

⁴ The Return link at the bottom right on these displays make moving between the “build”, “edit”, and “export” sections faster.

QUERY BUILDER

Building the Query

Although it can be broadly used for “finding stuff”, Query Builder is most useful for finding a group of people to whom you want to send a e-mail note, export a list, or set an activity as shown in “Using the Query Results” below. You access it from **Systems Query Builder**. You see the very large display shown in Figure 83.

The query entries are by SONISWEB® record such as “Address” or “Interests”.

Note there are Submit and Reset buttons at the top and the bottom so, no matter where you are on this large display, you can find a button to submit the query.

You enter the query values in this way:

- ◆ A blank entry for a field means don’t test this item in the database; everything is acceptable.
- ◆ For most entries, you can pick one or more items. For example, you can choose Juniors and Senior (Status) from Maryland and Virginia (State).
- ◆ Some fields require typed input, most commonly for dates.
- ◆ The “Check All” checkbox, enlarged at the bottom of Figure 83, is used in the actions shown in Figure 85.
- ◆ To clear what you’ve selected and start over, click the Reset button.
- ◆ To start the query, click the Submit button. You get a result summary like that shown in Figure 84.

The screenshot shows the 'Query Builder' interface with the following sections and fields:

- Address:** City, State (Alabama, Alaska, Arizona), Zipcode, County Code (Chatham, Durham), Country (Canada, England), Preferred, Citizen.
- Bio:** DOB (Equal to), Gender, Ethnic Code.
- Level:** Level (High School, Freshman), Dept. (DCM, Day), Division (Business, College).
- Campus:** Campus (Asian Campus, Business), Status (Alumni, Applicant), Interest (Alumni Association, Basketball).
- GPA:** School Year (200405), Semester (Fall), Semester GPA (Equal to), Cumulative GPA (Equal to).
- Education:** Degree, From, Advisor (Abbott, Edgar; Algonquin, Edgar).
- Project:** Term of Interest (Fall 1998, Fall 2001), Date of Inquiry (Equal to).
- Application:** Application Completed (App. Date), Program Code Applied For (Accounting, Accounting CH (Discontinued)).
- Disposition:** Disposition, Date (Equal to).
- Program & Major:** Program Code (Accounting, Accounting CH (Discontinued)), Active Program, Major, Active Major.
- Careers:** School Year (200405), Semester (Fall), Course ID (ACCT100, AVIATION, ART101).
- Enrollment:** School Year (200405), Semester (Fall), Enroll Status (FULL TIME).
- Tests:** SAT Math (Greater Than), SAT Verbal (Greater Than), ACT English (Greater Than), ACT Math (Greater Than), ACT Science (Greater Than), ACT Social Studies (Greater Than).
- Health:** Item (Diphtheria Vaccine, German Measles), Received, Expires (Equal to).
- Interests:** Interest (Alumni Association, Basketball), Position Held, From, To.
- Special Needs:** Special Need (Agoraphobic, Hearing Impaired, Learning Disability), Active.
- Licenses:** License (Certified-Chartered Acct, CPR Certified), Date Received (Equal to), Expires (Equal to).
- Advisor:** Advisor (Abbott, Edgar; Algonquin, Edgar), Active, Started (Equal to), Stopped (Equal to).
- Employment:** Employer, Contact, When Employed.

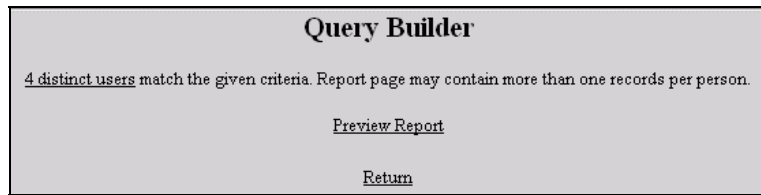
At the bottom, there is a 'Check All' checkbox which is checked, and 'Reset' and 'Submit' buttons.

• Figure 83 Query Builder Display

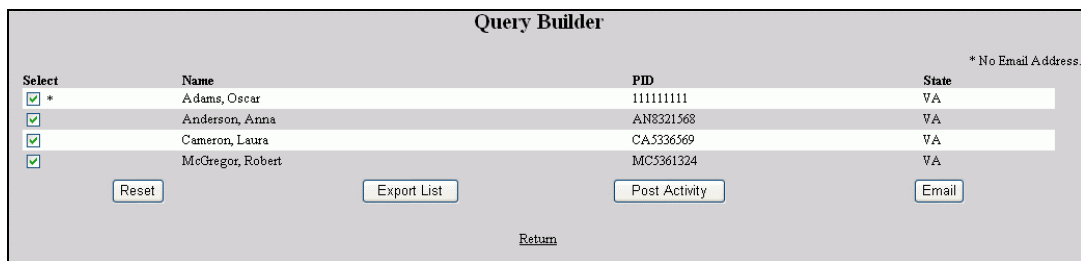
Using the Query Results

The summary of the query shown in Figure 84 gives you three options:

- ◆ Click [Return](#) where the results show that you need to change the selections in Figure 83.
- ◆ [Preview Report](#) shows you the list of people found with the query.
- ◆ [... Distinct Users](#) shows you how many were found based on your selections in Figure 83. Click it to get Figure 85.



• Figure 84 Query Builder Result Summary



• Figure 85 Query Builder Actions from the Results

The action you take depends on these factors:

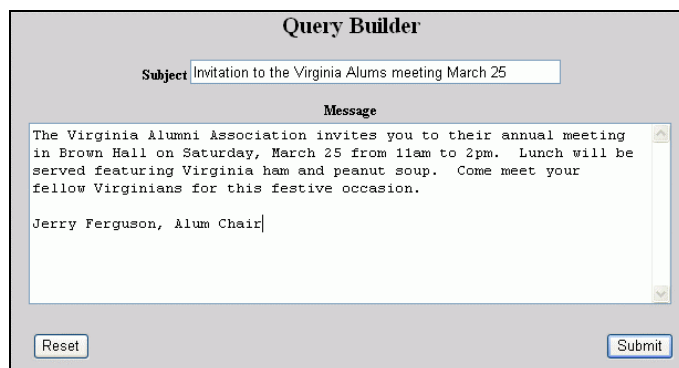
- ◆ The checkmarks under Select in Figure 85 mean these persons are to be included in the action you start with the buttons at the bottom. These are checked because you checked the “Check All” checkbox in Figure 83. Had you turned off the checkmark in “Check All”, all the checkboxes in Figure 85 would be blank.
- ◆ The asterisks (*) beside checkboxes means there’s no e-mail address for this person. So if you use the Email button in Figure 85, those persons will never be sent the e-mail note in spite of the checkmark.

The action buttons at the bottom do this:

Export List puts the list in a file for you to use as you wish.

Post Activity opens a dialog with the Activities function of SONISWEB® so you can create and post an activity for your records.

Email gives you a prompt display for entering the e-mail note as shown in Figure 86. When you click the Submit button, the note is sent.



• Figure 86 E-Mail from Query Builder Results

ROOMS AND BUILDINGS

Room Search - Room Finder

With Room Finder you can quickly answer the question, “Between May 22nd and June 16th, is there a room available on Tuesdays between 9:30am and noon on the Main or East campuses that’ll hold 20 people, 5 disabled, that has an Ethernet connection, an LCD projector, and a white board?”

• Figure 87 Room Finder

Systems Room Finder lets you search for rooms based on the attributes your institution set up in “Equipment and Facilities for All Rooms” and “Building Attributes and Features” below. Dates and times can be limited by the rooms assignments you made for course sections (Course Section Add or Edit).

Using the “Show Only Open Rooms” checkbox at the bottom left you can compose a query like that above. You can search within a building using the “Building Code”. You can search one or more campuses using the “Campus” selection.

“Room Code” combined with “Building Code” lets you look at one specific room record simply and directly.

The query yields a list of rooms that met your criteria as illustrated in Figure 88.

Room Finder				
Room Code	Room	Seats	Disability Seats	Assigned Courses
E100	Brown 100	50	8	Y
E200	Brown 200	125	27	Y

[Search Again](#)

• Figure 88 Room Finder Results

Click the underlined Room Code in Figure 88 and you see the room information like that in Figure 90 but without the ability to change the room attributes.

You can make [Room Finder](#) available to your administrative staff so they can find rooms but not permit them to change the room parameters. Only those assigned access to [Rooms and Buildings](#) can make the changes.

Quicker Navigation of the Rooms and Buildings Function

Buttons and links have been added to the Rooms and Buildings displays so you can move more quickly around the function.

Rooms and Buildings				
Rooms in 'Brown Hall' on the 'Centerville Main Campus' Campus				
(Click on Room Code to edit room or click Add Room below)				
Room Code	Room	Seats	Disability Facilities	Disability Seats
B100	Brown 100	50	Yes	8
B200	Brown 200	125	Yes	27
B300	Brown 300	27	Yes	5

• Figure 89 Room List for a Building

The circled [Return....](#) link at the bottom of Figure 89 shows it.

Equipment and Facilities for All Rooms

With version 2.0 you replace the memo of a room record with a list of attributes (equipment, connections, etc.) that you can search with [Room Finder](#).

Rooms and Buildings				
Edit Room in 'Brown Hall' on the 'Centerville Main Campus' Campus				
** Room	<input type="text" value="Brown 100"/>	** Room Code	<input type="text" value="B100"/>	
Seats	<input type="text" value="50"/>	Disability Facilities	<input checked="" type="checkbox"/>	Disability Seats <input type="text" value="8"/>
Memo	<input type="text"/>			
Room Attributes: <ul style="list-style-type: none"> Air Conditioner <input checked="" type="checkbox"/> Carpeted <input type="checkbox"/> Ethernet Connection <input checked="" type="checkbox"/> LCD Projector <input checked="" type="checkbox"/> Sink <input type="checkbox"/> Test Attribute <input type="checkbox"/> Time Out Corner <input type="checkbox"/> Water Fountain <input type="checkbox"/> White Board <input checked="" type="checkbox"/> Windows <input type="checkbox"/> 				
<input type="button" value="Reset"/> <input type="button" value="Submit"/>				

• Figure 90 Room Attributes

The table is established in [Systems Table Maintenance Room Attributes](#) that yields Figure 91.

With the attributes established, use [Systems Room and Buildings](#) to work your way to Figure 90. There you click the checkboxes for the Room Attributes on the right to define the room. Click the Submit button and you set the attributes for Room Finder to use.

There's another separate table of attributes for housing, dorm rooms, and apartments. They are called "Housing Attributes" and only apply to rooms where the "Building Type" is marked as Dorm.

Table Maintenance - roomattributes		
<input type="button" value="ADD New Record"/> OR Edit Record (click on Button in the row): Sort Order		
Attribute	Attribute Code	disabled
(roomattr_txt)	(roomattr_cod)	(disabled)
Air Conditioner	<input type="button" value="AR"/>	0
Carpeted	<input type="button" value="CP"/>	0
Eiethernet Connection	<input type="button" value="EC"/>	0
LCD Projector	<input type="button" value="PJ"/>	0
Sink	<input type="button" value="SK"/>	0

• Figure 91 Room Attributes

In Figure 91 you use the ADD button for a new attribute. Click an Attribute Code button to change the Attribute description or disable an attribute you don't want used. If an attribute has never been used, you can delete it.

As you see in Figure 90, these attributes become the checkbox list on the right.

Building Attributes and Features

Like rooms above, buildings can have attributes as well. These attributes apply to both housing (dorm) buildings and classroom buildings, theaters, office building, hospitals, etc. The table is established in **Systems Table Maintenance Building Attributes** that yields table similar to Figure 91.

The bottom of the Building records has a place to select the attributes using checkboxes like those in Figure 92.

Building Attributes					
Back Door <input checked="" type="checkbox"/>	Dark Room <input type="checkbox"/>	Elevator <input checked="" type="checkbox"/>	Fire Escape <input checked="" type="checkbox"/>	Front Door <input checked="" type="checkbox"/>	Handicap Entrance Ramp <input checked="" type="checkbox"/>
Laundry <input type="checkbox"/>	Meeting Rooms <input type="checkbox"/>	Stage <input type="checkbox"/>	Wireless Access <input checked="" type="checkbox"/>	Workout Facility <input type="checkbox"/>	
<input type="button" value="Reset"/> <input type="button" value="Submit"/>					

• Figure 92 Building Attribute Selection

Note that both dorm attributes (e.g., Laundry) and classrooms (e.g., Stage) are defined since these attributes apply to all your buildings.

REPORTS AND MAILING

Reports Using Cold Fusion[™] Report Builder

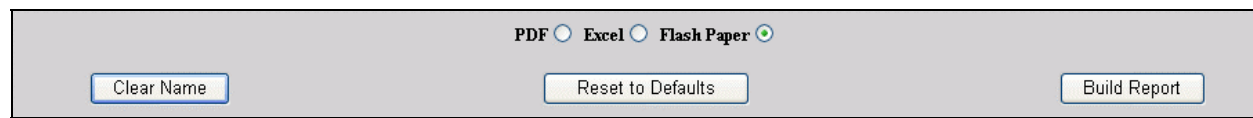
All of the new reports and nearly all of the version 1.0 through 1.4 reports are written or re-written in the new Cold Fusion[™] Report Builder. Its advantages are:

- ◆ Cold Fusion[™] is designed to run on any standard Web browser and nearly all PC-type operating systems from MacIntosh[®] to Windows[®] to Linux[®]. Customers have reported that Crystal Reports[™] often did not work on other browsers and operating systems.
- ◆ There is no added cost for Cold Fusion[™] Report Builder. You needed to buy at least Crystal Enterprise to run anything written in Crystal Reports[™].

Reports written with Report Builder have “(RB)” following their name. You can customize these reports in a manner similar to Crystal Reports[™].

All the reports written in version 1.0 through 1.4 with Crystal Reports[™] are still available in that form. However changes to them, as well as new reports or features, will be available only in “RB” (Report Builder) reports.

Choice of Paper, PDF, or Excel Output



• Figure 93 Report Builder Output Choices

Figure 93 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.

Flash⁵ 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 this option isn't offered for all reports.

Sometimes your Web browser will “hang” and become unresponsive with the PDF and/or Excel options. Usually it's because your current browser security settings don't permit such downloads. If you experience it, try the report with either a different browser or on another computer. If it works there, you know it's some security setting in your browser that's preventing the download. Different browsers – even a different version of the same brand of browser – can have different security settings, so check the browser-provider's Web site for guidance in setting it up for downloads.

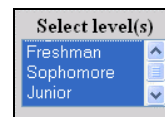
⁵ “Flash” is a Web browser display mode that's used with many Macromedia software packages including Cold Fusion[™] Report Builder.

Mail Merge Direct Export to Excel File

The mail-merge “reports” are really designed to be tables you put on disk and then use with a mail-merge function in word-processing software to create a custom mailing. With Cold Fusion™ Report Builder you chose to have the mail merge “report” exported directly as an Excel-compatible file without ever viewing it. (See Figure 93). If you use the current Crystal Reports™-Enterprise version, you view the “report” then used the Export icon to create a file for the mail merge.

Level Selection Option for Mailing Labels

In addition to the output options shown in Figure 93, a level section is now provided as shown in Figure 94 in the “RB” version⁶ of the report.



• Figure 94 Level Selection for Mailing Labels

Mailing Labels as Adobe® PDF Files

Although you can use any of the three output options for the “RB” version⁶ of the mailing labels (See Figure 93), the PDF version makes the page alignment more certain for the label sheets and it can be saved as a file for use by you or others you send it to.

Receivables Report: Additional Selection, Exclusion, and Inclusion Options

• Figure 95 Receivables Report Exclusions

This report, accessed by **Financials** Receivables, provides the exclusions circled in Figure 95.

Awards Summary Report

See “Fund Allocation and Balance in Awards” on page 42.

“Sophomore” Not “2” on Report Selections

Level is a number but is often shown by standard words such as “Junior” for level “3”. (You can change the term you use as part of configuration.) On report selections the term has replaced the level number. You see that in “Level(s)” in Figure 94 and Figure 95.

⁶ “RB” means the Cold Fusion™ Report Builder, see “Reports Using Cold Fusion™ Report Builder” on page 50.

Including Transfer Courses in Course Listing

• Figure 96 Course Listing Transfer Course Option

In Course Listing (RB)⁶ you have the option of including – or not –transfer courses in the course listing. In Figure 96 the option is circled.

Transfer Courses						
Course	Description	Credits	Level	In GPA	Transfer Institution	
ART1	Beginning Art	3.00	0	Yes	Smith College	
ART309	Art Therapy	2.00	0	Yes	College of William and Mary	
Bad101	Badminton	3.00	0	No	Kellogg College	
ENG500	The Modern Novel	3.00	0	Yes	Carnegie-Mellon	
HIS 101	American History 1	3.00	0	No	Lourdes College	
HIST25	Subtropic Cultures	3.00	0	Yes	Peacemaker J.C.	
Math 107	Calculus 1	3.00	0	No	Boston University	
MATH107	Business Math	3.00	0	Yes	Lourdes College	
MUS169	The Beatles and Culture	2.00	0	No	Bowling Green State University	
PE 101	Physical Education	1.00	0	No	Lourdes College	
PHIL344	Religion In The Modern	3.00	0	Yes	Boston College	

• Figure 97 Course Listing Transfer Courses

They're usually at the end of the listing and include the name of the institution as shown in Figure 97.

Leave of Absence Report Status Option

An additional option in the Leave of Absence report is the ability to select by status. You access it by LOA Report(RB)⁶. Figure 98 shows the new selection.

• Figure 98
Status
Selection

Excludes from E-Mail

Timed Email

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

Mark invalid emails as Stopped

Send	Name	Activity	Email Address	Message
	Barnes, Nathan (BA9653397)	EmailWithAttachment	No Valid E-Mail Address	Attached please find a Word document for your revi...
<input checked="" type="checkbox"/>	Colt, Yancy (CO6303485)	EmailWithSalutation	dankeefe@yahoo.com	Wishing you a very happy birthday. Sincerely,...
	Gleason, Jackie (GL6403092)	Pledge E-Mail	No Valid E-Mail Address	Thank you for your pledge payment. Your continued...
<input checked="" type="checkbox"/>	Prospect, Jamie (PR1486750)	E-Mail	myemail@sonis.com	This bogus email is testing the 'Timed Email' func...

• Figure 99 E-Mail Selections

With [Timed Email](#) and [Timed Email: Prospects](#) you see a list of persons and their e-mail addresses based on your report selection choices.

Those with valid address have checkboxes by each name. You can click a checkbox so it is blank and that person will not receive the note.

Those with invalid e-mail address are prominent. If you check the “Mark invalid emails as stopped” in Figure 99, the activity that triggered this timed e-mail will be marked as stopped. That will be evident when you run Activities reports.

Dynamic Salutations in Timed Letters

It's been in Timed Emails now it's in Timed Letters. In the [Activities](#) setting for timed letters you can specify a dynamic salutation (“Greetings [first name] from the University”) and have it appear on the letters as they are viewed and/or printed. If you don't specify such a salutation, the system inserts “Dear [first name],”.

STUDENT AND ALUMNI/AE ACCESS

Forum for Student Dialog

The student course listing includes a new Forum icon circled in Figure 100.

Click it and the student enters a classic Internet forum display for setting topics and engaging in a dialog with others students. Figure 101 shows what a dialog looks like.

Registration Course Selection Options

It has changed as shown in Figure 32 in “Registration Course Selection Option” on page 19 for an example.


Display of Multiple Instructors for a Course

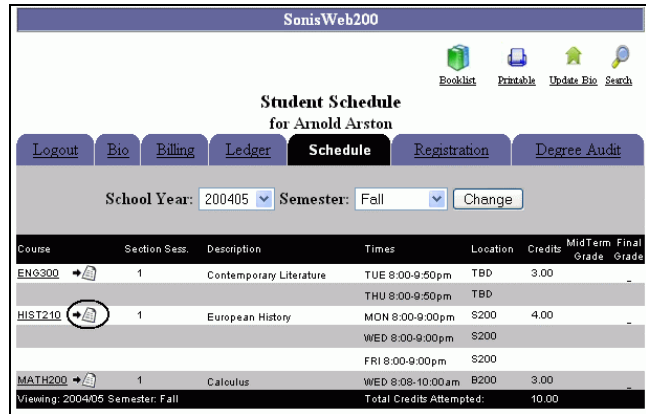
A student clicks an underlined course such as those in Figure 100. A separate display shows all instructors, the days and times, the room, and – where available – the syllabus for the course.

Session Display for Courses

Sessions, the shorter sessions within a semester, now appear on the course display for courses that use them. Look at Figure 70 on page 37 to see a session in a schedule display.

Student Changes to the National Student Loan Clearinghouse Block

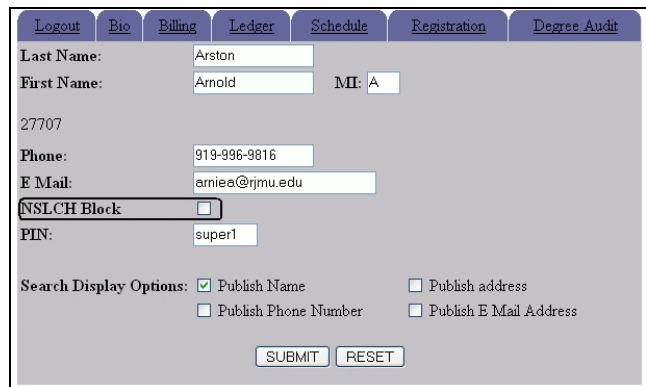
 The NSLCH (National Student Loan Clearinghouse) “block” is in each person’s Biographic records. It could only be changed by an administrator. Now it appears when the student clicks the Update Bio icon so the student can change it. It’s circled in Figure 102.



• Figure 100 Student Schedule Display with Forum Icon



• Figure 101 Forum Dialog Example



• Figure 102 NSLCH Block in Update Bio Display

Separate Settings for Student and Alumni/ae Display Control

Using Systems Student Bio/Fin Options you get the display in Figure 103. With it you control what a student or alum can see (Display) and/or change (Edit) by putting checkmarks in the appropriate checkboxes. If you permit Edit, Display is automatically allowed.

Staff Added to Search Choices


 Students can now use the Search function to find Staff members (status = SF). In

Figure 104, the new Staff option is circled and the results of search with no search criteria (search for all) appears at the bottom.

Payment Plans

Students with a payment plan in force (see page 8) can see their balances. It's at the bottom of their Billing display with the name Payment Plans.

Institution Details on Education Record

Education records contain a reference to the institution attended. These institution names are now a live link. Click it and you see the details, such as address, phone number, etc., directly from the Education records. Figure 105 shows the information display after the underlined institution name was clicked in an Education record.

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

• Figure 103 Student (and Alumni/ae) Biographic and Financial Options

Search Results						
Name	City	State	Zipcode	Phone	E Mail	
Abbott Edgar					profabbot@rjmu.edu	
Black Jack					Not Available	
Emmons Maureen					Not Available	
MacFund Bruce					Not Available	
Nasbitt Joanne	Raleigh	NC	27613	919 981 2091	dnaves@sonis.com	
Palance Jack					Not Available	
Schuler Paul					Not Available	
Staffer Tanya					Not Available	

Found 8

• Figure 104 Search for Staff

RJM University					
Name	Edgar Abbott				
Address	123 Rosemary St				
City	Chapel Hill	State	NC	Zip	27514
County	du	Country	U.S.A.		
Affiliated	No				
Email	support@sonis.com	Phone	919-932-63	Fax	
Contact					

[Close Window](#)

• Figure 105 Institutions Details

OTHERS

Locator for Students and Faculty

Every student and faculty member has a new [Schedule](#) function. Click it and you see his or her entire schedule for the current semester.

Algonican, Edgar (Faculty - 444444444)						
Schedule						
Time	Session	Room	Building	Campus	Course	
Unassigned						
.0 - .0						
Monday						
8:00 pm - 9:00 pm		Smith 200	Smith Hall	Centerville Main Campus	ENG200	
Tuesday						
8:00 am - 10:00 am		Clark 200	Clark Hall	Centerville North Campus	MATH200	
9:30 am - 11:30 am	1	Smith 100	Smith Hall	Centerville Main Campus	CSC110	
8:00 pm - 9:50 pm		To Be Determined	To Be Determined	To Be Determined	ENG300	
Wednesday						
10:00 am - 11:00 am		Clark 200	Clark Hall	Centerville North Campus	BIOL101	
8:00 pm - 9:00 pm		Smith 200	Smith Hall	Centerville Main Campus	HIST210	
Thursday						
9:00 am - 11:00 am	1	Smith 100	Smith Hall	Centerville Main Campus	CSC110	
8:00 pm - 9:50 pm		To Be Determined	To Be Determined	To Be Determined	ENG300	
Friday						
2:00 pm - 4:00 pm		Clark 200	Clark Hall	Centerville North Campus	MATH200	
8:00 pm - 9:00 pm		Smith 200	Smith Hall	Centerville Main Campus	HIST210	
School Year / Semester				200405 / 1		
<input type="button" value="Reset"/>				<input type="button" value="Submit"/>		

• Figure 106 Schedule - Locator Display

The “School Year/Semester” pulldown near the bottom of Figure 106 lets you choose another time and see the schedule for that semester.

Limitation on Who Can Place Holds

When adding or updating an administrator’s [User Security](#) record, you can limit that person’s ability to place holds. You pick from among the holds you’ve defined. When working with a student’s hold record, all the holds are shown but only those the administrator has rights to set are underlined as a link.

User Security

Editing User ID: super4 Profile: admission

Hold

Archive

Financial Aid

Financial Registration Hold

Post Transactions

Registration

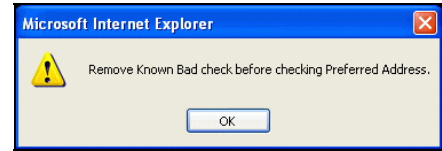
Roster

Transcript

• Figure 107 Holds Limitation in User Security

Prevent Known Bad Addresses from Becoming the Preferred Address

Where an address record is checked as “Known Bad”, that address cannot be checked as the “Preferred” address. An attempt to do that results in the error message shown in Figure 108. Preferred addresses are used for most mailings and certain government reports, so they must be real, dependable addresses.



• Figure 108 Error on Known Bad Address as Preferred

Preserving Your Entries During Name and Course Searches

You use Names or Courses for a search. You don't get what you want. We've made a new assumption. We preserve what you entered as Figure 109 shows. So now when you return to the search display, the information you entered remains there. You can revise it and try the search again.

• Figure 109 Preserving Search Entries

Enforcement of the System-Generated ID Number

An option in Systems Systems Variables lets you select whether your administrators are to enter an ID (PID) number for your new students, faculty, and staff or you want SONISWEB® to automatically generate a pseudo-random ID for each new person. Our customers said they wanted the System-Generated-ID option strictly enforced. In version 2.0, if you select that option, a PID cannot be entered for a new person, it will be generated by SONISWEB®. A PID can only be used in a Names search or to give an existing person a new status.

Current Password Not Required to Change User Security

When an administrator changes a person's security setting using the User Security function, the administrator doesn't need to know the person's current password to make the changes.

Change My Password Function

New to 2.0 is Systems Change My Password. Figure 110 shows it.

• Figure 110 Change My Password

Separate Status Options in Web Options

An applicant is admitted as a student. Her or his Applicant record is changed to reflect that by clicking the “Student?” checkbox shown in Figure 111.

A prospective student is accepted as an applicant. His or her Prospect Detail Record is changed by checking the “Applicant” checkbox that’s similar to Figure 111.

Arnold, Jane (Applicant - AR1833324)		Application	
Classical Piano			
Division	Daytime	Campus	Asian Campus
App. Date	06/01/2004	Major Applied	
Entry Date	09/01/2004	Major Accepted	
Acknow. Date	07/01/2004	Student?	<input checked="" type="checkbox"/>
Application Completed	<input checked="" type="checkbox"/>		

• Figure 111 Applicant Admission as Student

That process can handle the status change in three ways based on your settings in Figure 112:

- ◆ Don’t give the person a new status at all.
- ◆ Give the person a replacement status of AP or ST and delete the prior status.
- ◆ Give the person an additional status of AP (Applicant) or ST (Student) while preserving the old status⁷.

Generate Record Status for Applicants		
Do not generate a new status. <input type="radio"/>	Replace the Prospect Status with Applicant. <input type="radio"/>	Add Applicant to the Prospect Status. <input checked="" type="radio"/>
Generate Record Status for Students		
Do not generate a new status. <input type="radio"/>	Replace the Applicant Status with Student. <input type="radio"/>	Add Student to the Applicant Status. <input checked="" type="radio"/>

• Figure 112 Generate Status Choices in Web Options

You pick those three choices in **Systems Web Options** where you specify whether an Applicant (status = AP or OA) moving to a new status as Student (status = ST) is to have the new status added and the old status retained or the new status is to replace the old one. The same choice is available for a Prospective Student (status = PS) moving to Applicant (status = AP). There are now two separate selection options for Applicant and Student as you see in Figure 112.

⁷ Many schools preserve the old status to use for statistical analysis or for recruiting studies.

Changing the Display Colors

Systems Login Page Setup gives you the power to change display colors for each category of user (i.e., student, faculty, administrator, etc.).

• Figure 113 Colors in the Login Page Setup Table

As Figure 113 shows, you can change each major part of the display. The colors come from the “Colors” table in [Table Maintenance](#). In that color table you use standard World Wide Web color names or the hexadecimal number for the colors without standard name.

Custom Web Style Sheets

If you have a current “look” for your Web presence that’s defined by a Cascading Style Sheet, you can use it to make the opening SONISWEB® display and the security login displays have your “look”.

• Figure 114 Web Options Style Sheet Setting

You substitute your CSS for the one delivered in SONISWEB® using **Systems Web Options**. First you have to put your CSS, or a copy of it, in the system-space used by SONISWEB®. As Figure 114 shows, you then replace the standard name with your CSS name. If your CSS file cannot be found, the name will revert to the original and you’ll see an error message.

See www.w3.org/Style/CSS/ for more on “Cascading Style Sheets”.

FOR MORE INFORMATION

Call 800-411-7208 or send a note to support@sonis.com.

Adobe® is the registered trademark of Adobe Systems, Inc.
 Cold Fusion™ is a trademark of the Macromedia Corporation a part of Adobe Systems, Inc.
 Crystal Reports™ is a trademark of Business Objects SA.
 FireFox™ is a trademark of the Mozilla Foundation.
 Google® is the registered trademark of Google, Inc.
 Lotus®, Lotus 1-2-3™, and WordPro™ are trademarks of Lotus Development Corporation, a subsidiary of the IBM Corp.
 Microsoft®, SQL Server™, and FoxPro™ are trademarks of the Microsoft Corporation.
 Netscape® is a trademark of Netscape Communications Corporation.
 OpenOffice and StarOffice™ are trademarks of Sun® Microsystems, Inc.
 SONISWEB®, SONIS®, RJM Systems, and related logos are trademarks of RJM Systems, Inc.
 The Financial Edge® and The Raiser’s Edge® are trademarks of Blackbaud®, Inc.

This text, its graphics and SONISWEB® software and designs are copyrighted © 2006 by RJM Systems, Inc., all rights reserved.

(SONISWEB Version 2.0 Release.doc - 04/03/06 10:33 AM)