



Scholastic ONline Information System
for the Web

Student, Faculty, Applicant, and Alumni/ae Re- cord-keeping

© 2001 - 2006 RJM Systems – all rights reserved

Personal and professional records are – with a few exceptions – identical for students, faculty, staff, alumni/ae, applicants, prospective students, withdrawn students, and constituents. This text describes the entry of, and changes to, these records. It also covers changes of “status” such as from prospective student to applicant, from applicant to student, and from student to alumna/us. This text starts with **navigating** the functions on page 4, then provides a **alphabetical reference by record** on page 11, and provides **details** and processes starting on page 49. To see the **changes** in this edition look on page 4.

August 2006

Systems, Inc.

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

Table of Contents

TABLE OF CONTENTS	2
NEW IN THIS EDITION	4
<i>August 2006 Updates</i>	4
<i>June 2006 Enhancements</i>	4
<i>March 2006 Initial Release</i>	4
NAVIGATING THE FUNCTIONS	6
NAMES SEARCH.....	7
WHAT DO YOU WANT TO DO?.....	8
DIAGNOSING AND FIXING PROBLEMS.....	10
SETTING YOUR BROWSER FOR PROPER FUNCTION AND SECURITY	10
ALPHABETIC REFERENCE BY RECORD	11
ACTIVITIES.....	11
ADDRESS	11
<i>Bulk Address Changes</i>	12
ADVISORS.....	13
APPLICATION	13
BALANCES	13
BIOGRAPHIC	14
<i>Biographic Buttons at the Bottom of the Biographic Display</i>	18
<i>Faculty Additions to the Biographic Record</i>	18
CHECKLIST.....	19
CITIZENSHIP (VISA) INFORMATION.....	19
CONSTITUENT INFORMATION	20
COURSES	21
CULTIVATION ACTIVITIES.....	23
DISPOSITION	23
EDUCATION.....	23
EMERGENCY CONTACTS	25
EMPLOYERS	25
EMPLOYMENT	26
ESSAY MEMO.....	26
FINANCIAL AID	26
FUND RAISING	27
HEALTH	28
HOLDS.....	29
HOUSING ASSIGNMENTS	29
HOUSING INCIDENTS.....	30
HOUSING POST RELATED CHARGES	30
HOUSING PREFERENCES	30
INSTITUTION	31
INTERESTS AND ORGANIZATIONS	33
LEAVE STATUS	34
LICENSES & CERTIFICATES	35
MAJORS AND MINORS	36
OFFICE HOURS.....	36
PARKING	36
PARKING INCIDENTS	36
PAYMENT HISTORY	36
PAYMENT PLANS.....	37

PLEDGE.....	37
PLEDGE PAYMENTS.....	38
POST TUITION TCODES.....	38
PROGRAMS.....	39
PROSPECT INQUIRY DETAILS AND PROSPECT INQ.....	40
PROSPECT INQUIRY EXTRA.....	40
REFERENCES.....	41
REGISTRATION.....	41
RELATIONSHIPS.....	42
SALARY, FACULTY.....	44
SCHEDULE.....	44
SPECIAL NEEDS.....	44
TENURE ACTIVITIES.....	45
TENURE ADMIN[ISTRATION] ASSIGNMENTS.....	45
TENURE AWARDS.....	45
TENURE COMMITTEES.....	45
TENURE GRANTS.....	46
TENURE PUBLICATIONS.....	46
TESTS.....	46
TESTS: ADDITIONAL.....	47
TRANSFER REGISTRATION.....	47
USER SECURITY.....	48
VOID PLEDGE/PAYMENTS.....	48
VOLUNTEER.....	48
COMMON USER ERRORS IN A NAMES SEARCH.....	49
RECORDS FIELD BY FIELD.....	49
SETTING TABLES.....	50
PHOTOS.....	52
ID CHANGER.....	53
DEALING WITH DUPLICATE PEOPLE-RECORDS.....	54
DUPLICATE ID WITH <u>NO</u> RECORDS ENTERED.....	54
DUPLICATE ID WHERE RECORDS HAVE BEEN ENTERED.....	54
INTRODUCTION TO KEEPING THE PEOPLE-RECORDS.....	56
SUMMARY OF ROLES OR “PEOPLE-STATUSES”.....	56
INFORMATION AND RECORDS FLOW WITHIN SONISWEB®.....	57
SONISWEB® TEXTS YOU NEED FOR THE DETAILS.....	57
CHANGING STATUS - PROSPECT TO APPLICANT TO STUDENT TO GRADUATE.....	58
<i>Prospective Student to Applicant</i>	58
<i>Applicant to Student</i>	58
<i>Student to Graduate</i>	58
ADDING A NEW PERSON.....	59
ADDING A NEW STATUS.....	61
DELETE STATUS.....	63
RECORDS BY STATUS.....	64
GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS.....	67

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™ is a 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.

(StudentFacultyEtcRecords.doc - 09/01/06 1:12 PM)

NEW IN THIS EDITION

August 2006 Updates

- Enlarged explanations of the affects of “Exclude from Mailing”, “Inc[lude] in Directory”, and “Publishing Options” in the Biographic record, pages 16 and 17.

June 2006 Enhancements

- The addition of the “BA Degree” and “Drivers License” fields to the Biographic license, Figure 11 on page 14 and the text that follows it.

March 2006 Initial Release

- This edition is for SONISWEB® version 2.0. A few of these changes were also added to version 1.4.
- Figure 1 Toolbar for those with User-ID access and Figure 2 Function Lists - Partial, page 6.
- Figure 85 Administrator login, Figure 86 Student and other login and Figure 87 Typical SONISWEB® Page, page 67.
- Most of the reports have been rewritten in the Cold Fusion™ Report Builder. Those have “(RB)” following their names as seen in Figure 2. The older Crystal Reports™-Enterprise reports (without the “RB”) are still available in most cases.
- Table 1 Records by Status 1 of 2, page 64.
- Table 2 Records by Status 2 of 2, page 65.
- “Address”, page 11.
- “Bulk Address Changes”, page 12
- “Biographic”, page 14
- “Courses”, page 21
- “Education”, page 23
- “Employers”, page 25
- “Essay Memo”, page 26
- “Holds”, page 29
- “Institution”, page 31
- “Majors and Minors”, page 36

- “Programs”, page 39
- “Prospect Inquiry Extra”, page 40
- “Schedule”, page 44
- “Tenure Activities”, page 45 through 46.
- “Setting Tables”, page 50
- “ID Changer”, page 53
- “Adding a New Person”, page 59

NAVIGATING THE FUNCTIONS



• Figure 1 Toolbar¹ for those with User-ID access

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

The access rights of an administrative user is defined by:

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

After clicking **Names** in Figure 1 you pick a person as shown in Figure 3 and Figure 4. Once you've picked the person, you get Figure 2 on the left of your display.

Figure 2 shows the records for a person viewed as a Faculty member. For full lists of records for each status, see "Table 1 Records by Status 1 of 2" on page 64 and "Table 2 Records by Status 2 of 2" on page 65.

Records
Activities
Address
Advisors
Application
Biographic
Courses
Education
Employment
Financial Aid
Interests
Leave Status
Licenses
Majors
Parking
Parking Incidents
Payment Plans
Post Tuition Tcodes
Programs
Relationships
Schedule
Special Needs
Tests: ACT / SAT
Tests: Additional
User Security

• Figure 2 Function Lists
- Partial

¹ You only see what you're authorized to see by your Profile and individual Limits and Privileges. So your choices may be fewer than these. Students, Alumni/ae, and Withdrawn students have the longest list of records. Faculty, Applicants, etc. have fewer records

NAMES SEARCH

Name Search

Enter the ID or as much of the name as you know

PID OR Last First MI

Status: Constituent, Faculty, Online App

Division: Business, College, Daytime

Campus: Centerville East Campus, Centerville Main Campus, Centerville Medical Campus

Dept.: COM, Day, Eng

Level: High School, Freshman, Sophomore

Buttons: Reset, Search, Clear, Add Name/Record Status

Alternative Search: You can also search by maiden name or social security number

• Figure 3 Names Search

Follow the guidance in Figure 3 to find the person. See also “Common User Errors in a Names Search” on page 49 and “Adding a New Person” on page 59.

Where there’s only one person found, you get the opening record immediately.

Name Search

Record 1 - 3 of 3

Name	PID	Status	Division	Campus	Dept.	Level
<input checked="" type="radio"/> Johnson, Dale W.	888888888	Faculty	Daytime	To Be Determined	Science & Technology	Senior
<input type="radio"/> Jones, Amanda B.	JO1163232	Faculty	TBD	Centerville North Campus	To Be Determined	Not Applicable
<input type="radio"/> Jones, Maybell	JO8601008	Faculty	Evening	Centerville Main Campus	To Be Determined	High School

Buttons: View Record

Callout: Pick the person, then click the View button

• Figure 4 Select Name to View

If you didn’t use the ID² or fill in the entire name, you get a list of those matching your search criteria as illustrated in Figure 4. After clicking the View button, you see Figure 2.

Johnson, Dale (Faculty - 888888888)

Address

Record 1 - 2 of 2

Address Type	Preferred	Street Address	City	State	Zipcode	Known Bad
<u>Primary</u>	Y	1220 Waterfront Drive	Wrightsville Beach	NC	39919	N
summer	N	GD Canada Post	White Tip, SK, Canada		S7K 2L5	N

Buttons: Add

Callouts: To edit or delete an existing entry, click its underlined name; To add a new entry, click the Add button

• Figure 5 Records Selection or Addition

When you pick a record in Figure 2 you see choices like Figure 5.

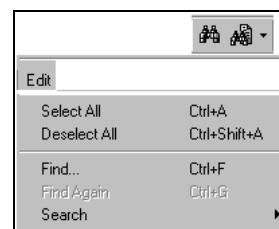
² ID is the number you assigned the person. If you set automatic ID assignment, SONISWEB® assigned the ID. ID is also called PID for Personal ID. With an ID and a PIN (personal identification number) a person can log on to your system. Administrative users have an additional User-ID and Password for wider access to the system.

WHAT DO YOU WANT TO DO?

- ACT tests, page 46.
- Activities, see the SONISWEB® manual “Overview of Activities, Timed E-Mail, Timed Letters, & Mail Merge”.
- Adding a New Person, page 59.
- Adding a New Status, page 61. See also the definition of status or role, page 56.
- Address, page 11.
- Advisors, page 13.
- Application, see the SONISWEB® text “Applicant Checklists, Activities, and Dispositions”.
- Biographic, page 14.
- Bulk Address Changes, page 12.
- Changing Status - Prospect to Applicant to Student to Graduate, page 58.
- Checklist, see the SONISWEB® text “Applicant Checklists, Activities, and Dispositions”.
- Citizenship (Visa) Information, page 19.
- Common User Errors in a Names Search, page 49.
- Courses, page 21.
- Cultivation Activities, see the SONISWEB® text “Development and Fund Raising”.
- Dealing with Duplicate People-Records, page 54.
- Delete Status, page 63.
- Disposition, see the SONISWEB® text “Applicant Checklists, Activities, and Dispositions”.
- Duplicate records, page 54.
- Education, page 23.
- Emergency Contacts, see “Relationships”, page 42.
- Employers, page 25.
- Employment, page 26.
- Errors from Name Searches, page 49.
- Faculty Additions to the Biographic Record, page 18 and Salary, Faculty, page 44.
- Financial Aid, page 26.
- Health, page 28.
- Holds, page 29.

-
- Housing Assignments, see the SONISWEB® text “Housing”.
 - Housing Incidents, see the SONISWEB® text “Housing”.
 - Housing Post Related Charges, see the SONISWEB® text “Housing”.
 - Housing Preferences, see the SONISWEB® text “Housing”.
 - ID Changer, page 53.
 - Information and Records Flow within SONISWEB®, page 57.
 - Institution, page 31.
 - Interests and Organizations, page 33.
 - Introduction to Keeping the People-Records, page 56.
 - Leave Status, page 34.
 - Licenses & Certificates, page 35.
 - Majors and Minors, page 36.
 - Office Hours, see the SONISWEB® text “Faculty Handbook”.
 - Parking Incidents, see the SONISWEB® text “Parking”.
 - Parking, see the SONISWEB® text “Parking”.
 - Payment History, see the SONISWEB® text “Development and Fund Raising”.
 - Photos, page 52.
 - Pledge Payments, see the SONISWEB® text “Development and Fund Raising”.
 - Pledge, see the SONISWEB® text “Development and Fund Raising”.
 - Post Tuition Tcodes, page 38.
 - Programs, page 39.
 - Prospect Inquiry Details, see the SONISWEB® text “Recruiting Prospective Students”.
 - Records Field by Field, page 49.
 - References,, page 41.
 - Registration, see the SONISWEB® texts “Registration by Staff” or the “Faculty Handbook”.
 - Relationships, page 42.
 - Roles of People, page 56.
 - Salary, Faculty, page 44.
 - SATests, page 46.
 - Setting Tables, page 50.
 - Setting Tables, page 50.

- SONISWEB® Texts You Need for the Details, page 57.
- Special Needs, page 44.
- Status add, page 61.
- Status Delete, page 63.
- Statuses of People, page 56.
- Summary of Roles or “People-Statuses”, page 56.
- Tests, page 46.
- Tests: Additional, page 47.
- Transfer Registration, see the SONISWEB® text “Registration by Staff”.
- User Security, see the SONISWEB® text “User Authorization & Profiles”.
- Visas, page 19.
- Void Pledge/Payments, see the SONISWEB® text “Development and Fund Raising”.
- Volunteer, see the SONISWEB® text “Development and Fund Raising”.
- If you don’t see what you need above, check the table of contents on page 2. You can also use the Adobe® find or search functions illustrated in Figure 6. It allows a Google®-like search³ by word or phrase.



• Figure 6 Adobe® Find and Search

Diagnosing and Fixing Problems

See “Common User Errors in a Names Search” on page 49 or the SONISWEB® text “Messages, Errors, and Diagnosis”.

Setting Your Browser for Proper Function and Security

Internet Explorer⁴ (IE), Firefox™, Netscape®, and Opera Web browsers have an “auto-complete” or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text “Browser Settings” to set your browser for security, good performance, and to prevent your getting old data.

³ If you’re unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text “Index to Texts”.

⁴ Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

ALPHABETIC REFERENCE BY RECORD

“Names Search” on page 7 and “Adding a New Person” on page 59 show how to get to the records below.

If these records are new to you, see “Introduction to Keeping the People-Records” on page 56 that contains the details, guidance, examples, and a flow diagram of the processes.

For a list of records by status, see Table 1 and Table 2, pages 64through 65.

Activities

These are used to set task-lists for your staff. Since many of the tasks are related to people, they’re kept as records for individuals. See the SONISWEB® task-specific manuals such as “Timed Letters, Timed E-Mail & Timed Mail-Merge” and “Recruiting Prospective Students” to learn more about Activities and how to set them up.

Address

Everyone must have an address designated as “Preferred”. Most people will have multiple addresses with other designations such as “Summer” and “Primary”. If you need to change a large number of addresses, an option is “Bulk Address Changes” on page 12.

Bills, Timed Letters, and e-mail address links use the “Preferred” address.

Johnson, Dale (Faculty - 88888888)			
Address			
Preferred	Yes	Address Type	Primary
Electronic Mail	profjohnson@rjmu.edu	Salutation	
Labels 1	<input type="checkbox"/>	Labels 2	<input type="checkbox"/>
Labels 3 Flag	<input type="checkbox"/>	Known Bad	<input type="checkbox"/>
Street Address	1220 Waterfront Drive	Street Address	
Street Cont.		Street Cont.	
City	Wrightsville Beach	State	North Carolina
Zipcode	39919	Zipcode	39919
Telephone	949-555-1212	Cell Phone	949-555-1211
Fax		Fax	
Work Phone	949-555-1111	County Code	
Country	U.S.A.	Country	U.S.A.
Memo	<input type="text"/>		
Reset		Submit	

• Figure 7 Address Detail Record

The address record is shown in Figure 7. For “alums” you might not have a good address. You click the checkbox⁵ beside Known Bad so that you have a record of that.

Salutation is how the person should be addressed in e-mail notes and formal mailings. See “Timed Letters, Timed E-Mail & Timed Mail-Merge” for more information.

⁵ See page 68 for information on using pulldown lists, radio buttons, and checkboxes.

The checkboxes for **Labels 1**, **Labels 2**, and **Labels 3** are used to produce mailing labels to send mailings to multiple addresses. You need an institution-wide agreement on how these checkboxes are to be used. The SONISWEB® “Reports” manual shows how they are used.

To change the “Preferred” address, pick the address you want to designate as Preferred, click the checkbox and you’ll get a confirming message. Figure 8 illustrates it. You can also use “Bulk Address Changes” below.

These address designations for your organization are defined during configuration⁶. You can use only those defined during configuration.

Current Preferred	New Preferred
562 River Walk Wilmington, NC 27890	Hwy 341 Junction City, CO 71459

• Figure 8 Changing the Preferred Address

Bulk Address Changes

It’s summer and your faculty scatters to their summer locations. Their summer addresses include, perhaps, different e-mail addresses. To maintain contact by mail and e-mail, you can change the required Preferred addresses to the summer addresses and change them back in the fall.

Click **Systems** in Figure 1 and then Bulk: Preferred Address in Figure 2. You get Figure 9.

• Figure 9 Bulk Preferred Address Change

In Figure 9 pick the status, level (if applicable), and choose the From and To addresses. Click the Submit button and all the addresses meeting your criteria are changed.

⁶ For more information on configuration, see “Setting Tables” on page 50.

Advisors

The screenshot shows a web form titled "Advisors" for a student named "Bellows, Wendelin" with ID "BE2253076". The form has several fields:

- Active:** A checkbox that is currently unchecked.
- Advisor:** A dropdown menu showing a list of faculty names: Abbott, Lou; Algonican, Edgar; Benson, Paul; Boring, Ulyssus; Breck, Bob; brown, betty; Darvey, Joe; Emerson, Ralph; Frankenheimer, Sam; Greco, Carol.
- Started:** A date field containing "02/25/2004".
- Stopped:** An empty date field.
- Memo:** A large empty text area for notes.
- Buttons:** "Reset" and "Submit" buttons at the bottom.

• Figure 10 Advisor Record

Most students and applicants have one active advisor. Some with multiple majors may have a different advisor for each major. That is covered under “Majors” on page 35.

To make an advisor inactive yet keep a record of the assignment, click the Active box until the checkmark⁵ disappears to show that advisor as inactive. You enter the Started and – in the case of inactive advisors – the Stopped date.

You can Delete an advisor with the Delete button. You lose all record that this student-advisor relationship existed, so making it inactive is better.

In adding a new advisor, you get a record with the pulldown⁵ shown in Figure 10. You select the advisor from a pulldown⁵ list. That list consists of faculty members who have “advisor” checked in their faculty record. See “Faculty Additions to the Biographic Record” on page 18 for the setting of advisor.

Application

The application record is covered in the SONISWEB® text “Applicant Checklists, Activities, and Disposition”

Balances

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”.

Biographic

Williams, Billy (Student - WI3647496)			
Biographic			
Last	Williams	First	Billy
Nickname		Prefix	Mr.
Maiden		Gender	Male
PID	WI3647496	PIN	View
DOB	View	Deceased	<input type="checkbox"/>
Exam ID		Affiliation	Resident, State
Ethnic Code	Black	Marital Code	Single
IPED Status	First-time Degree	Academic Status	Good Standing
Level	Junior	Tuition Status	Full-Time
Dept.	Science & Technology	Division	Daytime
Online Reg. Hold	<input type="checkbox"/>	Release	<input type="checkbox"/>
Exclude from Billing	<input type="checkbox"/>	Exclude from Mailing	<input type="checkbox"/>
NSLCH Block	<input type="checkbox"/>	Incl. in Directory	<input checked="" type="checkbox"/>
Citizenship Information			
MI	Dee	Status	ST
Suffix		SSN	View
Expired	<input type="checkbox"/>	Citizen	<input checked="" type="checkbox"/>
Photo Filename		Served In Military	<input checked="" type="checkbox"/>
Fund. Stat.		Driver License	NC 27861423579712M
Campus	Centerville Main Campus		
Date Released			
Exclude from Bulk Transactions	<input type="checkbox"/>		
BA Degree	<input type="checkbox"/>		
Publishing Options			
Hide Name	<input type="checkbox"/>	Include:	Address <input checked="" type="checkbox"/> Phone <input checked="" type="checkbox"/> Work Phone <input checked="" type="checkbox"/> Email Address <input checked="" type="checkbox"/>
Remarks	<input type="text"/>		
Transcript Memo	<input type="text"/>		
Disabled	<input type="checkbox"/>		
<input type="button" value="Reset"/>		<input type="button" value="Submit"/>	
<input type="button" value="DELETE"/>			

• Figure 11 Biographic Display

This record captures the basic description of a student (ST), a faculty member⁷ (FA), an applicant (AP), Online Applicant (OA), an alumna or alumnus (AL), a staff member (SF), a prospective student (PS), Withdrawn Student (WD), or a constituent (CO). Not all schools use all of the information in this display. Several fields need more explanation.

See “Setting Tables” (page 50) for the setting of the pulldown⁵ values.

- Status** ST

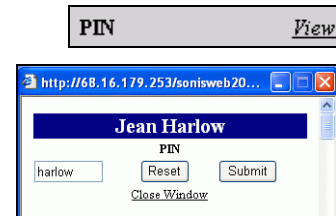
Status is based on the choice you made in Figure 3. Even though a person may be a student and an alumnus/a and a faculty member, Figure 11 shows only the one status you chose in Figure 3 or Figure 4. Statuses or roles are illustrated in Figure 75 on page 56.
- PID** BE2253076

PID is set when the person is added and can only be changed through a special process available to a

⁷ Many organizations include staff and graduate student teaching assistants in the faculty databases. Staff who also serve as advisors or instructors must be in the faculty list if they are to be assigned classes or advisees.

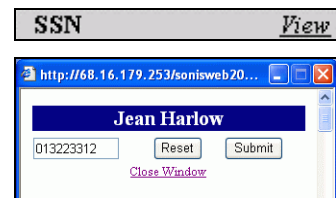
specially authorized administrator⁸. See “Adding a New Person” (page 59) for the setting of the PID.

- **PIN** is the code that a person uses – like a password – to log on to SONISWEB® from the Internet. You must be authorized to view and/or change a PIN. If you’re authorized, you see the [View](#) link at the top of Figure 12. Click it to see the display at the bottom of Figure 12. If you see a Submit button in Figure 12, you can change it, but make sure you let the person know you have changed it. Automatic assignment of the PINs is covered in the text “User Authorization & Profiles”.



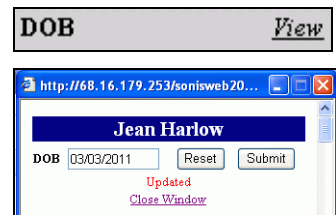
• Figure 12 PIN Display

- **SSN** is for the U.S. federal Social Security Number. It’s required for certain government guaranteed student loans. You must be authorized to view and/or change an SSN. If you’re authorized, you see the [View](#) link at the top of Figure 13. Click it to see the display at the bottom of Figure 13. If you see a Submit button in Figure 13, you can change it.



• Figure 13 Social Security Number Display

- **DOB** is Date of Birth. You must be authorized to view and/or change a DOB. If you’re authorized, you see the [View](#) link at the top of Figure 14. Click it to see the display at the bottom of Figure 14. If you see a Submit button in Figure 14, you can change it.

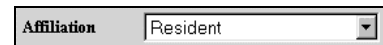


• Figure 14 Date of Birth Display

- **Exam ID** is an option for administrators entering final grades. The Exam ID option must be set in [Web Options](#) to use it. It’s used mostly by law schools that require anonymity.



- **Affiliation** determines what a student is charged for courses. Examples are “Resident”, “County Resident”, “Sponsored students”, etc. See the SONISWEB® manuals “Course & Section Processing” or for Flat Fees, “Financial Record-keeping and Billing” for the assignment of these affiliations and the setting of the fees.



- **Citizen** may be important to your institution. Non-citizens on work-study programs and those employed by your institution are normally required to have work permits. In some nations, you must track the visas of your foreign students.



⁸ See “ID Changer” on page 53.

See “Citizenship (Visa) Information” on page 19 for recording Visas.

- **IPED⁹ Status** for government reporting as described in the SONISWEB® manual “Enrollment Reports for IPEDS and other reporting”.

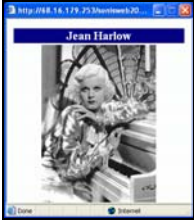
IPED Status First-time Degree

- **Served in Military** may offer those students financial assistance. In some nations, provinces, or states, military veterans get preferential treatment as students or as staff.

Served In Military

- **Campus** is chosen if you plan to limit this student to registering for courses taught only on the campuses you select from this list.

- **Photo Filename¹⁰** is for connecting the person’s photo with his or her biographic record. Typically, these are photos taken for student or employee ID cards. Since most are taken with digital cameras, it’s a simple matter to place copies of the photo-files in the SONISWEB® data space and enter each file name in the biographic record. It must be a standard browser image type, with JPG (JPEG) the most popular.



- **Tuition Status** is optional and informational for your staff. It’s not actively used by SONISWEB®.

Tuition Status HT

• Figure 15 Photo

Online Reg. Hold <input type="checkbox"/>	Release <input type="checkbox"/>	Date Released <input style="width: 80px;" type="text"/>
---	----------------------------------	---

- **Online Reg. Hold** means that this person cannot register himself or herself via the Web. See “Holds” on page 29.

- The **Release** and the **Release Date** are spare fields you can use for your purposes¹¹.

- **Exclude from Billing** is linked to billing in **Financials**. With this checked, the person would not have a bill printed for him or her unless the person printing the bills selects the “Include Excludes from Billing” option during billing. See Billing in the text “Financial Record-keeping and Billing”.

- **Exclude from Mailing** affects all Mail Merge reports (Mail Merge Prospects, Mail Merge Student/ Applicants) and all Timed reports (Timed Email, Timed Email Prospects, Timed Letters, Timed Mail Merge, Timed Letters Prospects). It blocks e-mail sending functions. It does not prevent printing Mailing Labels and Mailing Labels for Prospects.

- **NSLCH Block** is used to prevent this student’s records from being disclosed in National Student Loan Clearinghouse reports. See the SONISWEB® manual “Clearinghouse: Exporting for the National Student Clearinghouse”.

⁹ The Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics, Office of Educational Research & Improvement, U.S. Dept. of Education.

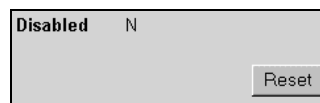
¹⁰ See “Photos” on page 52 for requirements.

¹¹ You can rename and reuse them as described in the SONISWEB® manual “Custom Fields, Web Pages, and Colors”.

- **Inc[lude] in Directory** is checked when the Biographic record is first created. If you remove the checkmark, this student will not appear in the “Enrolled Student Directory” report.
- **BA Degree** is displayed for information on the Financial Aid record.
- **Citizenship Information** when clicked displays the visa records as described in “Citizenship (Visa) Information” on page 19.
- **Drivers License** is displayed for information on the Financial Aid record.
- **Publishing Options** indicate the person’s choice or your institution’s choice of what information can be shown about that person with the SONISWEB® search. (You can also write custom reports that check this setting.) All names will appear in this search area unless “Don’t Publish” is checked. For the city and state to appear check the “Include Address” checkbox. The same goes for “Phone”, “Email”, etc. “Don’t Publish” takes priority over everything else you’ve checked and the person will not appear in the search.

SONISWEB® provides a convenient Search function so that anyone validly logged on to your system can search for another person by name, city, etc. How much is revealed in that search is controlled by these Publishing Options settings.

- **Remarks** are notes on this person that are not otherwise available in the biographic record.
- **Transcript Memo** provides space for a memo that can appear on your school’s custom transcript¹². Since this same record is used for alumni/ae you can have “cum laude” appear on the transcript by entering it here.
- **Disabled**; when checked it prevents the person from logging onto SONISWEB® even if he or she has a valid ID and PIN. Only those with the “Disable login” security privilege see the checkbox in Figure 11. Everyone else sees a “Y” or “N” notation like Figure 16.



• Figure 16 Disabled Notation for Most Users

To see the contents of each of the fields, their size, and their type, check “Records Field by Field” (page 49) for guidance in viewing the data dictionary.

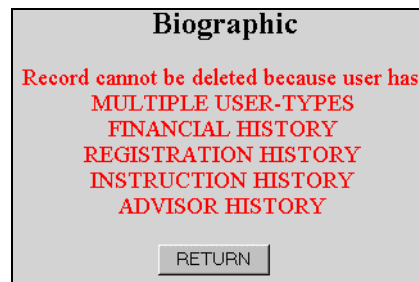
¹² There is no such thing as a standard transcript. Each institution has a custom transcript developed for it. Your transcript may ignore this Transcript Memo field.

Biographic Buttons at the Bottom of the Biographic Display

To clear out what you have entered so you can start over, click the Reset button in Figure 11.

To save what you have entered, click the Submit button.

If this is a new record with no other information entered, you may be able to delete it with the Delete button. Once you have accumulated records for this person, you will likely be denied deletion as illustrated by Figure 17.

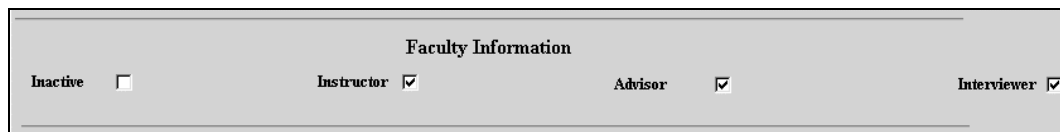


• Figure 17 Delete Denial

If you still want to delete the person, use the list of records in Figure 17 as your guide to remove the other records for this person so you can clear him or her for deletion.

See also “Dealing with Duplicate People-Records” on page 54.

Faculty Additions to the Biographic Record



• Figure 18 Faculty Biographic Record Addendum

For faculty, the contents of Figure 18 appears near the bottom of Figure 11. Additional faculty information is in a separate record described on page 44.

If students – usually graduate students – are to be assigned teaching or advisor roles, they must be given an additional role or status of faculty (FA) along with their role as students (ST). Without faculty status, they cannot be assigned course sections nor assigned to students as advisors. Staff (SF) who teach or advise also need an additional status of FA (faculty). See “Adding a New Status” on page 61.

Inactive is used to maintain the record of a faculty member who is no longer active. If the faculty member is on leave, you can add a record describing that leave. See “Leave Status” on page 34.

Instructor must be checked⁵ if the person is to be assigned course sections to teach. If this checkmark is not present, the person’s name will not appear as an eligible instructor for any section. See the text “Course & Section Processing” for instructor assignment.

Advisor allows this person to be assigned as an advisor to students. If this is not marked⁵, his or her name will not be offered in the list shown in “Advisors” (page 13) and “Majors and Minors” (page 36).

Interviewer is not currently used. It is present for compatibility with the older Windows™ version of SONIS®.

Checklist

There are Applicant and Recruiting checklists to help your staff be more effective and efficient. They are covered in the SONISWEB® text “Applicant Checklists, Activities, and Disposition”.

Citizenship (Visa) Information

Click the underlined phrase Citizenship Information in Figure 11 to get Figure 19.

Biographic : Citizenship Information				
Record 1 - 1 of 1				
Birth Country	Citizenship Country	Visa	Visa date	ISEAS
<u>Mexico</u>	Mexico	H-1B Professional Worker	04/13/1999	
<input type="button" value="Add"/>				

• Figure 19 Citizenship (Visa) Information List

Figure 19 is where you enter visa information. Click the Add button to add visa information. Click the underlined name of a visa to edit or delete it.

Biographic : Citizenship Information			
Birth Country	<input type="text" value="Mexico"/>	Citizenship Country	<input type="text" value="Mexico"/>
Visa	<input type="text" value="(H1B) H-1B Professional Worker"/>	Visa date	<input type="text" value="04/13/1999"/>
ISEAS	<input type="text" value="Not applicable"/>		
<input type="button" value="Reset"/>		<input type="button" value="Submit"/>	
<input type="button" value="Delete"/>			

• Figure 20 Citizenship (Visa) Information

When you click the Add button in Figure 19, Figure 20 is blank and there is no Delete button. When you click the underlined name in Figure 19, you get the current Visa information to edit.

Pick the Birth Country, Citizenship Country, and Visa from the pulldown⁵ lists. These should be taken directly from the Visa or a verified copy of it. (Country and Visa lists are set in Table Maintenance, see page 50.)

Enter the ISEAS (Interim Student and Exchange Authentication System) number. It too should be taken directly from the Visa. If an ISEAS number is not appropriate to this Visa, enter “Not applicable” in its place.

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

Click the Delete button to remove this record.

Click the Submit button to save your entries.

Constituent Information

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”.

Courses

This is a very brief overview of course records. See the SONISWEB® texts “Course & Section Processing” and “Registration by Staff” for fuller coverage.

Williams, Billy (Student - WI3647496)							
Courses							
Record 1 - 4 of 4							
Course	Section	Enroll Code	Grade	Official	Transferred	School Year	Semester
MME301	1	EN		No	N	200506	1
Eas101	6	EN	D	Yes	N	200405	1
ENG300	1	EN	C	Yes	N	200405	1
WIND	1	EN	A	Yes	N	200405	1

• Figure 21 Student Courses Listing

Figure 21 is the most common display when the Courses function is selected. We made this one small; most students, faculty and alums have much longer lists. To see more information on a particular class, click its underlined name. Courses are added to this list during registration.

Williams, Billy (Student - WI3647496)			
Student Courses			
School Year	200506	Semester	1
Section	1	Course Type Code	N
Enrollment Date	03/09/2006		
Course	MME301	Description	Maritime Engineering Introduction
Enroll Code	Enrolled	Pass-Fail	<input type="checkbox"/>
Course Authorization	Instructor authorized	Received	<input checked="" type="checkbox"/>
Grade		Date Completed	
Quality Points	0.00	Mid-Term Grade	
Cred.	3	Clinical Grade	
Include GPA	<input checked="" type="checkbox"/>	Repeat Year	
Repeated		Replaced With	
Replaced			
Posted to billing	<input checked="" type="checkbox"/>		
Memo			
Reset		Submit	
Delete			

• Figure 22 Student Course Detail

If you are authorized, you can change course information shown in Figure 22 then press the Submit button. You can delete a course once a student is registered, usually to drop¹³ a course (versus withdrawal) or to correct a clerical error. Withdrawing from the course has a different effect; it remains in the student’s record. You can give the student a Grade, Credits and Quality Points that reflect the withdrawal.

¹³ Drop versus Withdrawal is covered in the SONISWEB® text “Registration by Staff”.

Course Authorization	Instructor authorized	Received	<input checked="" type="checkbox"/>	Official	<input type="checkbox"/>
Grade	<input type="text"/>	Date Completed	<input type="text"/>	Class Hrs	<input type="text"/>
Quality Points	0.00	Mid-Term Grade	<input type="text"/>	Practice	<input type="text"/>
Cred.	<input type="text"/>	Clinical Grade	<input type="text"/>	Check Grade Details	
Include GPA	<input checked="" type="checkbox"/>	Repeat Year		Semester	
Repeated		Replaced With			
Replaced					
Posted to billing	<input checked="" type="checkbox"/>				

• Figure 23 Student Course Detail Enlarged

This is an alphabetical list of the fields in Figure 22 and Figure 23.

Check Grade Details is a link to view the scores the instructor used for the grade computation. Scores are an optional grading process, so not all courses with grades will have scores available. For more on scores and weighting, see the “Faculty Handbook”.

Class Hrs and **Clinical Grade** are optional. Clinical Grade is used mostly by medical schools. Class Hrs is of value for continuing education where contact hours must be reported.

Credits is part of the course record as defined by the Registrar. If authorized, you can change it for a student.

Date Completed is inserted when the Official checkmark is set. It is the date of the end of the semester as defined in the Semester table¹⁴ for that semester or it’s the end date from the Session table¹⁴ if this course section was set up with the session option.

Grade is normally entered for an entire course section by the faculty using their Grade Input (“Faculty Handbook”). An authorized person can change the grade in this student record.

Mid-Term Grade is a place to record mid-terms if you use them. It is normally entered by the faculty using their Grade Input (“Faculty Handbook”).

Official is a checkmark⁵ that means this grade will appear in student Web displays¹⁵, in the grade reports, and on the transcript. Making grades official is a formal process usually controlled by the Registrar. Quality points are not computed for unofficial grades.

Practice is an optional grade for those schools requiring a practicum as part of the course.

Quality Points are computed when the Grade is entered and made Official.

Repeated, **Year**, and **Semester** are used together. Repeated is a checkbox⁵ used to show the course was a repeat¹⁶. The Year and Semester show when the course was

¹⁴ See the SONISWEB® text “Course & Section Processing” for more information on setting these.

¹⁵ There is an option to allow posted but not official grades to appear on student displays.

¹⁶ The checkbox only appears if the course is eligible to be repeated. See the SONISWEB® manual “Course and Section Processing”.

repeated. Some schools do not use repeated courses. Some use it in transcripts and/or to modify the quality points assigned.

Replaced and **Replaced With** are used when a equivalent was used to repeat a course. You enter nothing, it is inserted automatically if an equivalent was used. See the text “Course and Section Processing”.

Cultivation Activities

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”.

Disposition

See the SONISWEB® text “Applicant Checklists, Activities, and Disposition” for the format and use of the Disposition record.

Education

The first time you add a person – regardless of her or his status (student, faculty, “alum”, etc.) – a “home institution” Education record is built with your institution as active and as the “home” institution. There is one exception. When a person is added as a Constituent, an inactive “home institution” Education record is built.



The screenshot shows the 'Education' record for Billy Williams (Student - WI3647496) at North Carolina School of Cosmetology. The form includes fields for Institution, Code (666666), Type (Certificate), and Additional Type (Certificate). It also has sections for Active status, From/To dates, Enrollment Age (35), Degree (B.S.), Orig. Grad. Year (2007), Grad. Yr., GPA (0), Quality Points (0), Rank (0 of 0 students), Transcript Received, Grad. Student, Date Received, Prog., Matric., Graduated, Anticip. Grad. Date (06/01/2007), Grad. Date, Curriculum (Maritime Engineering 1998), and a Memo field. Below these are sections for 'Program Add' and 'Major and Minor Add'. The Program Add section shows Maritime Engineering with Active YES, Graduated NO, Started 08/01/04, Stopped, and From AP NO. The Major and Minor Add section shows Maritime Engineering - Electr as a Major and Nursing as a Minor, with Active Y, Started 08/01/04, Stopped, and Advisor Johnson, Dale W. Buttons for Reset, Submit, and Delete are visible at the bottom.

• Figure 24 Education

Most people have several “pages” in their list of education. Figure 24 is typical of one of those pages. This information is usually entered as part of the applicant or enrollment process.

Curriculum sets the default when running a degree audit for this person as described in the SONISWEB® text “Degree Audit”.

Program and **Major and Minor** in Figure 24 are what you get by clicking “Programs” on page 39 and “Majors” on page 36.

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

Click the Delete button to remove this record.

Click the Submit button to save your entries.

To add a new Education record, click the Add button.



• Figure 25 Institution Search for Transfer Course

1. If you know the name of the institution, enter all or part of it in Figure 25. Spelling can be tricky since you may not know how another person entered the institution. Is it St. Olaf, St Olaf, ST OLAF, St. Olaf's, St. Olafs? Try entering “S” without the period. You will get all likely spellings of it, as well as St. Joseph and a few others. Once you find St. Olaf – however it was spelled – you can reenter it in Figure 25 for a shorter list.
2. If you don't know the Type of institution, leave that blank.
3. Click the Search button. That yields Figure 26.

Course Search				
Record 19 - 23 of 23				
Institution	Code	Type	City	State
University of Rhode Island		University		
University of Toledo	222222	University		
Vermont State University		University		
Wake Technical Community College	222222	Community Co	Cary	NC
Woodbury University	987654	University		

Previous

• Figure 26 Institution Search List

4. Page through the list with the Next and Previous buttons. If you do not find the institution, click the “Add New Institution” button in Figure 25.

The entries on the Institution Add form are simple. See “Institution” on page 31 for the details.

Emergency Contacts

This function has been replaced by “Relationships” on page 42.

Employers

You can set up records for employers to post jobs. It’s like the bulletin boards around the college with available jobs posted. This 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, nights, and weekends for students attending school.

Click **Systems** in Figure 1 and then click Employers in the list like Figure 2 that appears on the left of your display. You see Figure 27.

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

• Figure 27 Employer List

In Figure 27 you click the underlined name of an existing employer or the Add button to add a new one.

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"/>	PIN	<input type="text"/>	
Work Phone	<input type="text" value="410-555-1212"/>	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"/>	
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" value="New Haven"/>	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 28 Employer Master Record

Fill in the information in Figure 28. That includes the PID and PIN for the key contact for that employer. When editing the PID is shown but you cannot change it.

You only enter the first record for an employer. The person named in Figure 28 uses the PID and PIN you assigned to log in and add names of other contracts and to posts the jobs. The employer, not your staff, maintains those records. Clicking List Contacts in Figure 28 gives you e-mail addresses you can use to send notes to employer staff.

Employment

Employment records are especially important for faculty (FA) and staff (SF). Some schools also track the employment of “alums” (AL) and constituents (CO).

• Figure 29 Employment

If you are authorized to make changes, you edit or enter the information.

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

Click the Delete button to remove this record.

Click the Submit button to save your entries.

You should add an Employment record for each faculty or staff member with **Home Institution** (your institution) checked.

Home Institution

Essay Memo

Where applicants are required to write online essays, this record displays it.

• Figure 30 Essay Memo Record

Financial Aid

See the SONISWEB® manual “Financial Aid” for the details and use of this record.

Fund Raising

MacFund, Bruce (Staff - MA2074237)			
Fundraising			
Started	<input type="text" value="06/01/1999"/>	End Date	<input type="text"/>
	<input type="button" value="Reset"/>	Active	<input checked="" type="checkbox"/>
		<input type="button" value="Submit"/>	

• Figure 31 Fund Raiser Record

Staff members can have Fund Raiser records that look like Figure 31. As described in the SONISWEB® text “Development and Fund Raising”, only persons with this record active can be assigned development and fund raising duties.

Health

Owing to the many medical, nursing, and health education schools who use the SONIS® series of systems, extensive health records are available in SONISWEB®.

Health				
Received	Date	Item	Result	Expires
Y	02/02/2002	<u>1) Diphtheria Vaccine</u>		02/02/2012
N		<u>2) German Measles</u>		
N		<u>3) HbsAB</u>		
N		<u>4) HbsAG</u>		
N		<u>5) Hepatitis B - 2nd</u>		
N		<u>6) Hepatitis B - 3rd</u>		
N		<u>7) Hepatitis B - Initial</u>		
N		<u>8) Measles</u>		
N		<u>9) Mumps</u>		
N		<u>10) Rubella Titer</u>		
N		<u>11) Tetanus Toxoid</u>		
N		<u>12) Tuberculin Test 1</u>		
N		<u>13) Tuberculin Test 2</u>		
N		<u>14) Tuberculin Test 3</u>		
N		<u>15) Tuberculin Test 4</u>		
N		<u>16) VDRL</u>		

Delete

• Figure 32 Health Records List

To edit a health record, click its underlined name in Figure 32. That yields Figure 33.

Only health entries in the “Health Immunizations” table are shown in Figure 32. If you need others, see your SONISWEB® administrator. The configuration and maintenance of this table is outlined in “Setting Tables” on page 50.

Health					
Item 1: Diphtheria Vaccine					
Received	<input checked="" type="checkbox"/>	Date	<input type="text" value="02/02/2002"/>	Expires	<input type="text" value="02/02/2012"/>
Result	<input type="text" value="ok"/>				
Remarks	<input type="text"/>				
Reset		Submit			

• Figure 33 Health Record Detail

Enter or change the information in Figure 33, then click the Submit button. The changes will be reflected in the list shown in Figure 32.

Holds

Holds cover everything from registration to financial aid to transcripts. There are group-registration holds used to control registration periods. These are described in the SONISWEB® text “Registration by Staff”.

Individual holds are covered here. Certain “holds” halt registration. When a hold is in effect, the student cannot be registered for courses. The registration holds fall into these categories:

- Individual Online Registration hold; this affects only one student and prevents that person from registering on the Web. Administrators with registration authorization are not affected by this hold.
- Individual Registration hold; this hold blocks both Online Registration and registration by an administrator.

Other holds are set up by your SONISWEB® administration as part of configuration.

The screenshot shows a web form titled "Holds" for a student named "Bellevs, Wendolin" with ID "BE2253076". At the top, there is a red warning message: "Before making a hold active, please make sure there isn't already one of that type active." Below this is a "Hold" dropdown menu with the following options: Archive, Financial Aid, Grade Report, Online Registration, Registration, and Transcript. The form includes an "Active" checkbox (currently unchecked), a "Started" text input field, a "Stopped" text input field, and an "Authorized By" dropdown menu currently set to "Greco, Carol". There is also a "Memo" text area with a scroll bar. At the bottom of the form are "Reset" and "Submit" buttons.

• Figure 34 Holds

If you want to make the hold inactive (the record becomes historical), click the Active checkbox⁵ until it is blank with no check mark in it. Click the Submit button to save your change.

To add a new hold, click the Hold you want from the list¹⁷. Use the Authorized pull-down to pick the person who authorized the hold. Often you will want to add an explanation in the Memo field. Click the Submit button to save your change.

Housing Assignments

This subject and its records are described in the SONISWEB® text “Housing”.

¹⁷ You can only set holds your individual Privileges allow. You can set more than one Hold. See Figure 89 Selecting Multiple Choices on page 68 for guidance.

Housing Incidents

This subject and its records are described in the SONISWEB® text “Housing”.

Housing Post Related Charges

This subject and its records are described in the SONISWEB® text “Housing”.

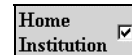
Housing Preferences

This subject and its records are described in the SONISWEB® text “Housing”.

Institution

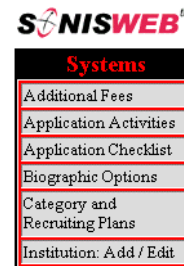
Institutions are initially entered during the configuration of your SONISWEB® system. The common entries are:

- Your institution which must be set as the “Home Institution”.
- Schools from which you often receive transfers.
- Your usual sources of new students such as high schools.



Once the initial set of institutions is entered, others are added while entering transfer courses and while adding education records (“Education”, page 23). Transfer courses are covered in the SONISWEB® text “Course & Section Processing”.

The entry of institutions follows these steps. Your role-profile must allow you to access **Systems** and Institution: Add/Edit to add institutions¹⁸.



• Figure 35 Systems Function List, Truncated

1. Click **Systems** at the top of your display (Figure 1). You see Figure 35.
2. In Figure 35, click Institution: Add/Edit. That yields Figure 36.

• Figure 36 Institution Add/Edit

3. Enter the name and/or select the type in Figure 36.

Note the caution on page 24 about the variant spellings of institutions. You should make sure that the institution does not exist with a slightly different spelling or a different **Type**. The biggest conflict with Type is “College” versus “University”.

4. Click the Search button. You get a display like Figure 37.

Institution: Add / Edit					
Record 1 - 4 of 4	Institution	Type	Home Inst.	City	State
<input checked="" type="radio"/>	Benjamin Franklin High School	High School	N		
<input type="radio"/>	Boston College	College	N	Boston	MA
<input type="radio"/>	Boston University	University	N	Boston	MA
<input type="radio"/>	Bowling Green State University	University	N	Bowling Green	OH

• Figure 37 Institution List

¹⁸ You can add them one at a time while entering education records as described in “Education” on page 23.

In Figure 37 you see the list of institutions that met your selection criteria in Figure 36.

After a thorough search, if you are certain the institution is not in your records, click the Add button in Figure 36.

5. Click the radio button⁵ beside the institution you want, then click the View button. You get the institution's record as shown in Figure 38..

Institution: Add / Edit
Note: Adding Institution To System Institution Table.

Institution	North Carolina School of Cosmetology	Affiliated	<input type="checkbox"/>
Home Institution	<input checked="" type="checkbox"/>	Type	Certificate
Address	607 N. Ambrose Drive	Addr2	Suite 116
City	Raleigh	State	North Carolina
County	<input type="text"/>	Country	U.S.A.
Email	support@sonis.com	Phone	800-411-7208
Contact	J Milburn		
size	<input type="text"/>	type	<input type="text"/>

• Figure 38 Institution Add

Note that your school should be Home Institution in your database. You can have only one home institution, yours! This is used throughout SONISWEB® for records pertinent to your school.

Institution	Chatham County Community College	Affiliated	<input checked="" type="checkbox"/>
--------------------	----------------------------------	-------------------	-------------------------------------

• Figure 39 Institutions with Affiliation

Affiliated institutions (Figure 39) are usually those where courses are shared. It's common in nursing schools which may use local community colleges for English and other liberal arts courses required for an associates or baccalaureate degree.

6. You enter or change the information, then click the Submit button to make the changes.
7. You cannot delete an institution's record once it's been used in an Education record (page 23) or for a transfer course. Otherwise you can delete it by selecting it from the pulldown⁵ arrow then clicking the Delete button. You get a confirmation display asking if you really mean it.

Interests and Organizations

Interests have a variety of uses. For students they usually define extra-curricular activities. For alumni/ae they often describe the post-graduation activities related to your school.

The screenshot shows a web form titled "Interests" for a user named "Bellows, Wendy (Student - BE2253076)". The form contains the following fields and controls:

- Interest:** A dropdown menu with "Student Government" selected.
- Position Held:** A text input field containing "Program Chair".
- From:** A date input field containing "08/01/2005".
- To:** An empty date input field.
- School Year:** A dropdown menu with "200506" selected.
- Semester:** A dropdown menu with "Fall" selected.
- Memo:** A large text area for notes.
- Buttons:** "Reset" and "Submit" buttons are located at the bottom of the form.

• Figure 40 Interests

The pulldown⁵ list for Interests is defined by your SONISWEB® administrator during configuration (see “Setting Tables” on page 50). Figure 41 is typical. After you have added or changed the contents of the Interest display, click the Submit button.

Optional entries include the From date, the To date, the School Year and the Semester. These dates are a useful way to keep track of the time a person spent in the organization.

You can delete this person’s interest records by clicking the Delete button. (It’s not shown in Figure 40 since it’s an add display, not an edit display). You get a prompting display asking if you really want to delete it.

The screenshot shows a dropdown menu labeled "Interest" with the following list of items:

- Basketball
- Bible Study
- Chess Club
- Dance and Theatre
- Film and TV
- Football
- Greenhouse Club
- Student Government
- Theater

• Figure 41 Interest List Example

Leave Status

Leaves are often associated with students. However, they can also be used to record faculty sabbaticals and long staff leaves.

The screenshot shows a web form titled "Leave Status" for a student named Wendy Bellows (ID: BE2253076). The form contains the following fields and controls:

- Active:** An unchecked checkbox.
- Leave Type:** A dropdown menu set to "Family Emergency".
- Projected Date:** An empty text input field.
- Semester:** A dropdown menu set to "Spring".
- From:** A date input field containing "04/01/2005".
- Reason Code:** A dropdown menu set to "Medical".
- School Year:** A dropdown menu set to "200405".
- To:** A date input field containing "05/10/2005".
- Memo:** A large text area for notes.
- Buttons:** "Reset" and "Submit" buttons at the bottom.

• Figure 42 Leave Status Record

In Figure 42:

Active shows whether or not the leave is active. You can anticipate a sabbatical by entering the information and dates in Figure 42 but leaving the Active checkmark⁵ blank until the leave is taken. When she or he goes on leave, mark the Active box with a checkmark⁵. On the person’s return from a leave, you can again turn off the Active checkbox⁵.

By marking leaves as inactive and entering the dates, you create a leave history for this person.

Leave Type is a pulldown⁵ of standard types. They are defined in the “Leave Type” table as described in “Setting Tables” on page 50.

Leave Reason is also a pulldown⁵ of standard reasons set up in the “Leave Reason” table as described in “Setting Tables” on page 50.

Leave Type and Leave Reason are used in the **Systems** function Withdrawn Students to:

- Archive and readmit students. See the SONISWEB® manual “Graduation and Promotion” for more on this.
- Optionally assign course grades automatically where the student has withdrawn from the courses and takes a “Withdrawal” leave of absence.

Enter the information in Figure 42, then click the Submit button.

Licenses & Certificates

Licenses are important in medicine, law, accounting, engineering, religious institutions, and public safety professions. SONISWEB® lets you keep extensive records of licenses. Some schools keep track of their alumnae and alumni and constituent licenses for custom mailings of interest to them.

Certificates are treated differently by different schools. Some treat a certificate – particularly a professional certificate – as an educational accomplishment similar to a degree. Those schools use “Education” (page 23) to record certificates. Others record them under “Licenses & Certificates”. Still others put certificates in categories, recording certain categories as Education and all others as an equivalent to a License.

The screenshot shows a web form titled "Licenses" for a user named "Boston, Jack (Alumni - BO5095160)". The form has the following fields and controls:

- License:** A dropdown menu with "Ordnained Minister" selected.
- Date Received:** A text input field containing "05/15/2000".
- Expires:** An empty text input field.
- Memo:** A text area containing "United Methodist".
- Buttons:** "Reset" and "Submit" buttons are located at the bottom of the form.

• Figure 43 Certificate & Licenses

Use the pulldown list to select the license or certificate. The choices are built in a table as described in “Setting Tables” on page 50.

Make your changes then click the Submit button. You can “remove” a certification either by showing an “Expires” date or deleting it.

Majors and Minors

Majors and Minors are initially entered in the applicant records as described in the SONISWEB® text “Applicant Checklists, Activities, and Disposition”.

You can also add or edit Majors and Minors from the Education record as you see at the bottom of Figure 24 on page 23.

The screenshot shows a web form titled "Majors" for student "Williams, Billy (Student - W13647496)". The form contains the following elements:

- Active:** An unchecked checkbox.
- Advisor:** A dropdown menu with "Johnson, Dale" selected.
- Major:** A dropdown menu with "Maritime Engineering - Electr" selected.
- Minor:** A dropdown menu with "Nursing" selected.
- Started:** A text input field containing "08/01/2004".
- Stopped:** An empty text input field.
- Buttons:** "Reset" and "Submit" buttons.

• Figure 44 Major Record

The detail in Figure 44 has a checkbox⁵ for “Active”. When a student changes majors, you Add a new major, make it active, then select the old major, click the Active checkbox⁵ so it is blank to make it inactive. This way you maintain a record of current and prior majors. Where you permit students to have more than one major you can specify that more than one of them is active.

Majors and Minors are set in a table named “Major/Minor”. See “Setting Tables” on page 50.

You specify a major advisor when setting up a major. SONISWEB® records two types of advisors. Most students have an academic advisor who is named in “Advisors” on page 13. Some students may have a different advisor for their major from a pulldown⁵ list like that in Figure 45.

The screenshot shows a pulldown menu titled "Advisor" with the following list of names:

- Abbott, Lou
- Adams, Amy
- Adams, Jen
- Algonican, Edgar
- Breck, Bob
- Brown, Betty
- Darvey, Joe
- Emerson, Ralph
- Frankenheimer, Sam
- Greco, Carol

• Figure 45 Major Advisor

Office Hours

This applies only to faculty and is for the convenience of students and advisees. Certain searches by students show these hours. It is a simple memo form described in the SONISWEB® text “Faculty Handbook”.

Parking

These records are covered in the SONISWEB® text “Parking”.

Parking Incidents

These records are covered in the SONISWEB® text “Parking”.

Payment History

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”

Payment Plans

Payment plans are an option that your school may offer. They're 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 46. Setting up payment plans is covered in the SONISWEB® manual "Financial Record-keeping and Billing".

To assign a payment plan Click Payment Plans in Figure 2. That yields Figure 46.

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 46 Payment Plan Assignment

To add a new one, use the "Select Payment Plans" pulldown⁵ to select a plan, then click the Add button.

You can't totally delete a plan but you change the "Agreed Amount" to zero where you want to substitute a new plan. You see that has happened in Figure 46.

For an existing plan, click its underlined name and you get Figure 47.

4-Payment Plan	Start Date	Agreed Amount	School Year
Agreed Date 01/18/2006	01/07/2006	1550	200304
Due Date	Amount Due		
01/16/2006	\$62.00		
01/26/2006	\$279.00		
02/06/2006	\$852.50		
02/26/2006	\$1,550.00		

• Figure 47 Payment Plan Details

Here you can change the Start Date 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 47. The "Amount Due" is cumulative based on the percentages in the plan definition.

Pledge

This is used only for constituents and is described in the SONISWEB® text "Development and Fund Raising"

Pledge Payments

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”.

Post Tuition Tcodes

Post Tuition Tcodes lets those authorized for people-records maintenance post a limited set of financial transactions.

Click Post Tuition Tcodes in Figure 2. (“Tcode” is an abbreviation for Transaction Code.)

Bellos, Wendolin (Student - BE2253076)

Post Tuition Tcodes

School Year **Semester**
Fee Codes
Amount
Check No.

Tuition Tcode History

School Year **Semester**
Selected Semester **All Semesters**

Tuition Tcode History for All Semesters:

Trans. Ref.	School Year / Semester	Date	Charge	Credit
Activity Fee	200001 / 2	08/02/2003	\$0.00	
Activity Fee	200001 / 2	10/14/2002	\$10.00	
Activity Fee	200001 / 2	10/14/2002	\$10.00	
Activity Fee	200001 / 2	07/25/2002	\$3.50	
Activity Fee	200001 / 2	06/18/2002	\$2.00	

• Figure 48 Post Tuition Tcodes

Your finance department will decide which transactions – if any – the Registrar and staff can post. Usually these are simple transactions such as a late registration fee or a payment.

It shouldn't be used to adjust tuition or flat fees since they're handled automatically by the add-drop functions described in the manual “Registration by Staff”.

Programs

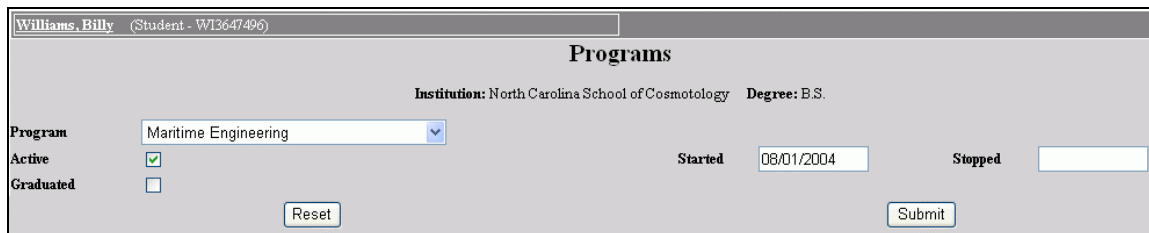
Programs¹⁹ can be entered at several points:

- From the Education record as you see at the bottom of Figure 24 on page 23.
- From a Web Inquiry or an Online Application. If an applicant adds more than one program, they're set as inactive.
- When an administrator adds an Application record; the program is set as inactive.
- When a Program record is added from the record list shown in Figure 2.

There can be only one active program at a time.

Programs can have fees associated with them. If a program has a fee, as soon as you assign that program to a person, the fee is applied to the person's financial records at the next registration. See the text "Financial Record-keeping and Billing" for information on setting up program fees.

You can also add or edit Programs from the Education record as you see at the bottom of Figure 24 on page 23.



The screenshot shows a web form titled "Programs" for a student named "Williams, Billy" (Student - W13647496). The form is for adding a new program. It includes a dropdown menu for "Program" with "Maritime Engineering" selected. There are checkboxes for "Active" (checked) and "Graduated" (unchecked). There are input fields for "Started" (08/01/2004) and "Stopped". There are "Reset" and "Submit" buttons. The institution is "North Carolina School of Cosmetology" and the degree is "B.S."

• Figure 49 Program Addition

Figure 49 shows the adding of a program record for a student. To add a program, click the pulldown⁵ field beside Program for the list of authorized programs. Pick one and add the applicable dates. Programs reside in a "Programs" table. See "Setting Tables" on page 50.



The screenshot shows a web form titled "Programs - Maritime Engineering" for the same student. The form is for editing an existing program. It includes checkboxes for "Active" (checked) and "Graduated" (unchecked). There are input fields for "Started" (08/01/2004) and "Stopped". There are "Reset", "Delete", and "Submit" buttons. The institution is "North Carolina School of Cosmetology" and the degree is "B.S."

• Figure 50 Program Edit

An existing program looks like Figure 50.

If this is the active program for this person, click the checkbox⁵ next to Active. To deactivate a program for a person, click the Active checkbox⁵ until there is no check mark in it. Click Submit to keep your addition or your changes.

¹⁹ Programs are areas of study such as Music, Engineering, Religion, English Literature, French, etc. They are often tied to a department.

Although you can delete a program with the Delete button, it is best to keep a record of past programs by making the program inactive. The Delete button removes all record of this program for this person.

The relationship between Program and Major/Minor is up to you. Some institutions link them tightly. To be in an Accounting program, you must be a Business Administration major. Others allow a Music major to be enrolled in both a Classical Piano program and a English Composition program.

Prospect Inquiry Details and Prospect Inq

Prospective student (prospect) information is described in the SONISWEB® text “Recruiting Prospective Students”. In some records it’s shown as “Prospect Inq”.

Prospect Inquiry Extra

Prospective student (prospect) information is described in the SONISWEB® text “Recruiting Prospective Students”

References

Reference information is used mostly for applicants and faculty.

References		
Name	Date Received	Reference
Prof John Jacobs		Recommended

• Figure 51 References

Note that there are two Add buttons in Figure 51. “Add W/Checklist Item(s)” is used for applicants. With that button, the reference is put in the applicant’s record and an entry is made in her or his Checklist record. As described in the manual “Applicant Checklists and Disposition”, the applicants see those references received and those outstanding. As the references are received and posted by school staff, they get checked off as complete.

References

Name	Prof John Jacobs	Title	Professor	Reference	<input type="button" value="v"/>
Address	12 Center Ave	Addr2	Byrd Building	Addr3	<input type="button" value="v"/>
City	Prescott	State	Arizona	Zip	<input type="button" value="v"/>
Phone	696-555-1212	Fax	<input type="text"/>	Email	jjacobs@prescottcc.edu
County	<input type="button" value="v"/>	Country	U.S.A.		
Received	<input type="checkbox"/>	Date Received	<input type="text"/>		
Memo	<input type="text"/>				

• Figure 52 Reference Entry

Figure 52 shows a detailed record. Reference is a pulldown⁵ list that is set in a table. See “Setting Tables” on page 50.

The **Received** checkbox⁵ shows that the reference has been received or verified by your staff.

Enter the information then press the Submit button.

This record may also be created as a person fills out the Online Application.

Registration

This choice in Figure 2 is a function, not a record. It is described in the SONISWEB® text “Registration by Staff”.

Relationships

This is a record of the relationships a person has either to another person in your SONISWEB® database, the name of an emergency contact²⁰, or both.

Click [Relationships](#) Figure 2 for a list for this person similar to Figure 4.

Click the Add button and you get a display like that in Figure 3. With it, you search for an existing person in your database with whom there is a relationship. Enter as much as you know of the related person's name and ID. If no person is found with this search, you get a display with a "No records match..." button shown in Figure 53. In that case, click the button to get a blank version of Figure 55.



• Figure 53 No Relationship Record Found

Williams, Billy (Student - WT3647496)						
Relationships						
Record 1 - 2 of 2						
Last	First	Relation	Work Phone	Telephone	Electronic Mail	
Walters	Charles	contactee	212-555-1211	216-555-1212	waltersc@baynet.net	
Anderson	Anna	spouse		560-342-4762	where@what.com	

• Figure 54 Relationships Name Found

If a match is found, you see a list of one or more names like that in Figure 4. Click the radio button⁵ of the person you want then click the Select button to get Figure 55.

If none of the persons in Figure 54 is the person needed, click the "Not Found-Add" button to get a [blank](#) version of Figure 55.

Williams, Billy (Student - WT3647496)						
Relationships - ADD						
Last	<input type="text" value="Walters"/>	First	<input type="text" value="Charles"/>	MI	<input type="text"/>	
Relation	<input type="text" value="contactee of emrcontact Billy"/>	PID	<input type="text"/>			
Street Address	<input type="text" value="2115 Main St"/>	Street Address	<input type="text"/>	Street Cont.	<input type="text"/>	
City	<input type="text" value="Scarboro"/>	State	<input type="text" value="Maine"/>	Zipcode	<input type="text" value="00123"/>	
County Code	<input type="text"/>	Country	<input type="text"/>			
Telephone	<input type="text" value="216-555-1212"/>	Fax	<input type="text"/>	Work Phone	<input type="text" value="212-555-1211"/>	
Electronic Mail	<input type="text" value="waltersc@baynet.net"/>					
Memo	<input type="text"/>					
<input type="button" value="Reset"/>			<input type="button" value="Submit"/>			
<input type="button" value="Delete"/>						

• Figure 55 Relationships Detail Record

When you click the "No records match..." button or the "Not Found-Add" button, you get a [blank](#) version of Figure 55. You must fill in all the information since there is no SONISWEB® record for this person.

²⁰ This Relationships record replaces the Emergency Contacts record on page 25.

To erase what you entered and start over, click the Reset button in Figure 55.

• Figure 56 Relationship List

Use the pulldown⁵ arrow to get the list of standard relationships²¹ as illustrated in Figure 56. Click the relationship that applies then click the Submit button shown at the bottom of Figure 55.

To delete a relationship, click the Delete button shown at the bottom of Figure 55.

To change the information in a relationship, click the underlined name of the related person in the list that look like Figure 5. You get Figure 55 where you can change the data then Submit it to change it.

²¹ These standard relationships are set up by your SONISWEB® administrator using the [Relation Join](#) systems function. If you need a new relationship added, contact your administrator.

Salary, Faculty

Salary, Faculty

Fac. Appt. Curr. Appt. Faculty Type

Tenured Tenure Date

Contract Salary Annual Salary

Memo

• Figure 57 Salary, Faculty

This is a special record for Faculty members. It adds to that part of the Biographic record shown in Figure 18 on page 18.

Schedule

This is not a record but a function used to find people, sometimes in an emergency, It shows the current class schedule.

Schedule

Time	Session	Room	Building	Campus	Course
Monday					
6:10 am - 8:00 am		Brown 100	Brown Hall	Centerville Main Campus	MIME301
Tuesday					
1:00 pm - 1:50 pm		Smith 100	Smith Hall	Centerville Main Campus	MIME320
Wednesday					
6:10 am - 8:00 am		Brown 100	Brown Hall	Centerville Main Campus	MIME301
Thursday					
1:00 pm - 1:50 pm		Smith 100	Smith Hall	Centerville Main Campus	MIME320
Friday					
6:10 am - 8:00 am		Brown 100	Brown Hall	Centerville Main Campus	MIME301

School Year / Semester

• Figure 58 Schedule

Select the year/semester from the pulldown⁵ in Figure 58 and then click the Submit button to see the schedule for that semester.

Special Needs

Special Needs serves many different purposes depending on the needs of the institution. Most use it to define physical disabilities that require special dormitory rooms or enrollment in classes with ADA approved entrances. You can use it any way you wish. The Special Needs table is created by your SONISWEB® administrator as part of configuration. See “Setting Tables” on page 50.

You get a list for this person if there are any. Click the Add button to create a new special needs record for this person as seen in Figure 59.



The image shows a web form titled "Special Needs". It features a "Special Need" dropdown menu with a list of options: Agoraphobic, Hearing Impaired, Learning Disability, Speech Impaired, Vision Impaired, and Walking Impaired. To the right of the dropdown is an "Active" checkbox, which is currently checked. Below the dropdown is a "Memo" text area. At the bottom right of the form is a "Submit" button.

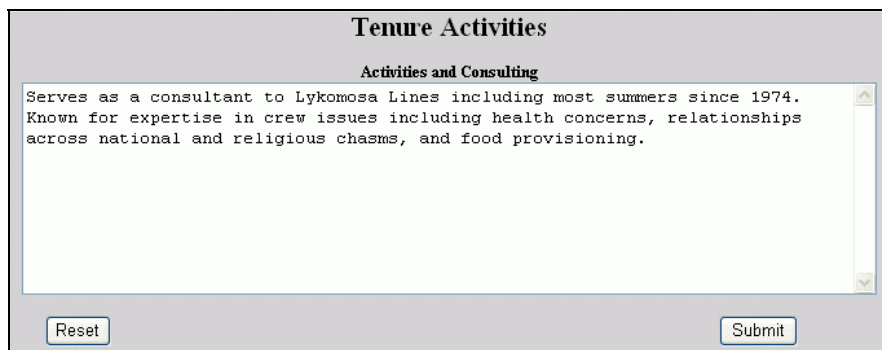
• Figure 59 Special Needs Record

Figure 59 allows you to pick a special need from the pulldown⁵ list and add additional information in the Memo space.

If this special need is no longer active, click the Active checkbox⁵ until the checkmark disappears. It will remain among the person's records for historical purposes.

Click the Submit button to add or update the record.

Tenure Activities



The image shows a web form titled "Tenure Activities". It has a sub-header "Activities and Consulting". Below this is a text area containing the following text: "Serves as a consultant to Lykomosa Lines including most summers since 1974. Known for expertise in crew issues including health concerns, relationships across national and religious chasms, and food provisioning." At the bottom of the form are "Reset" and "Submit" buttons.

• Figure 60 Tenure Activities

The contents are notes on past and current activities relevant to tenure.

Tenure Admin[istration] Assignments

The display is identical to Figure 60 and contains notes relevant to tenure.

Tenure Awards

The display is identical to Figure 60 and contains notes tenure.

Tenure Committees

Click [Tenure Committees](#) in Figure 2. The display is identical to Figure 60 and contains notes relevant to tenure.

Tenure Grants

. The display is identical to Figure 60 and contains notes relevant to tenure.

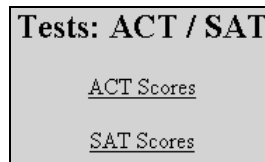
Tenure Publications

The display is identical to Figure 60 and contains notes relevant to tenure.

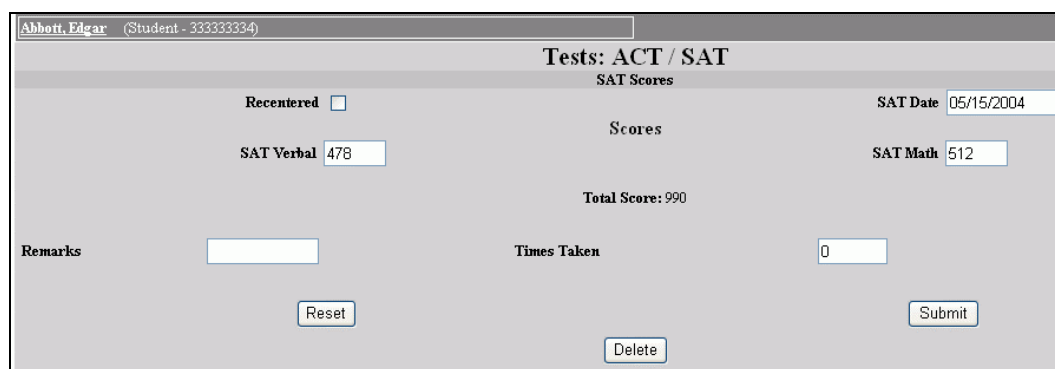
Tests

There are standard tests shown here and additional tests you specify in “Tests: Additional” on page 47.

SONISWEB® has ACT and SAT test results records built in as seen in Figure 61. To access test records, click the underlined name.



• Figure 61 Standardized Tests List



Abbott, Edgar (Student - 333333334)	
Tests: ACT / SAT	
SAT Scores	
Recentered <input type="checkbox"/>	SAT Date 05/15/2004
Scores	
SAT Verbal 478	SAT Math 512
Total Score: 990	
Remarks	Times Taken 0
<input type="text"/>	<input type="text"/>
<input type="button" value="Reset"/>	<input type="button" value="Submit"/>
<input type="button" value="Delete"/>	

• Figure 62 ACT Test Example

Figure 62 shows the selection of SAT test results. For a new test, the scores will be blank. Fill them in then press the Submit button.

SAT scores can be directly imported from the College Board©. See the SONISWEB® text “SAT Importer” for more information.

Tests: Additional

For many graduate, professional, and technical schools other standardized tests are required. During the configuration of SONISWEB® your administrator adds the names of your desired tests in the Tests table and removes any that are not needed. See “Setting Tables” on page 50.

Click Tests Additional in Figure 2 to get Figure 63.

Tests: Additional						
Test Name	Date Taken	State	Score	Percent	Status	Pass/Fail
<u>1) Swimming</u>	08/25/2001	VA	3.20	88.00	Passed	Y
<u>2) Stanford-Benet</u>			0.00	0.00		N
<u>3) Freud's Folly</u>			0.00	0.00		N
<u>4) Carter Chart</u>			0.00	0.00		N
<u>5) MPQA</u>			0.00	0.00		N
<u>6) SOL</u>	06/01/2000	VA	0.00	6.00	Passed 12 grade	Y

• Figure 63 Tests: Additional

Figure 63 is the list of tests defined by your institution. Click the underlined name of the test for which you want to enter scores.

Tests: Additional

Test 6:

Date Taken	<input type="text" value="06/01/2000"/>	State	<input type="text" value="Virginia"/>	Pass/Fail	<input checked="" type="checkbox"/>
Score	<input type="text" value="0.0"/>	Percent	<input type="text" value="6.0"/>	Status	<input type="text" value="Passed 12 grade"/>
Remarks	<input type="text"/>				
Memo	<input style="height: 30px;" type="text"/>				

• Figure 64 Additional Test Scores

Figure 64 shows the entry of test scores for your required tests. What you enter in Figure 64 is reflected in Figure 63.

Transfer Registration

Like “Registration” (page 41), this choice in Figure 2 is a function, not a record. It’s used to register course transferred from other institutions. It’s described in the SONISWEB® text “Registration by Staff”.

User Security

This is a function, not a record. You use it to give administrative access rights, beyond those available to faculty, students, etc. See the SONISWEB® text “User Authorization & Profiles” for more information.

Void Pledge/Payments

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”

Volunteer

This is used only for constituents and is described in the SONISWEB® text “Development and Fund Raising”

COMMON USER ERRORS IN A NAMES SEARCH

- Figure 65 shows what happens if you do not get a match. Click Return; it takes you back to Figure 3. What you entered in Figure 3 is preserved so you can make changes to it. Broaden the category selections and try again. It may be that the person is not a student but an applicant or prospect so select them all and search again.

No users matched your criteria. [Return](#)

• Figure 65 No Matches Found

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

• Figure 66 New User Error in Red

- Figure 66 appears when you attempt to add a new person but do not pick one item from each category list. Make your selections and click the Add New User button again.

When you create a record for a person, SONISWEB® generates²² a unique nine character ID using the first two letters of the last name and seven random numbers. You can use it permanently or change it later.

RECORDS FIELD BY FIELD

If you need to see the field-by-field parameters for each record, see the **Systems** function [Data Dictionary](#).

The table below is typical of what you find in the data dictionary. This is the students' advisor record which keeps the name of the assigned advisor.

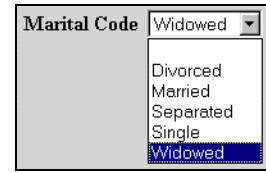
Record ID	Field Name	Type	Size	Key linkage to other databases
nmadv	active	bit/log	1	
	adv_rid	char	16	PK_nmadv
	adv_ssn	char	9	
	nmadv_ce1	char	10	
	nmadv_le1	bit/log	1	
	nmadv_ne1	float/dec	8	
	soc_sec	char	9	FK_nmadv_name2
	start_dt	date	8	
	stop_dt	date	8	

²² Your school has options to let you add a person and (1) let you enter the ID directly, (2) let SONISWEB® create an ID if you don't, or (3) permit only IDs generated by SONISWEB®. The option chosen is determined by your SONISWEB® administrator.

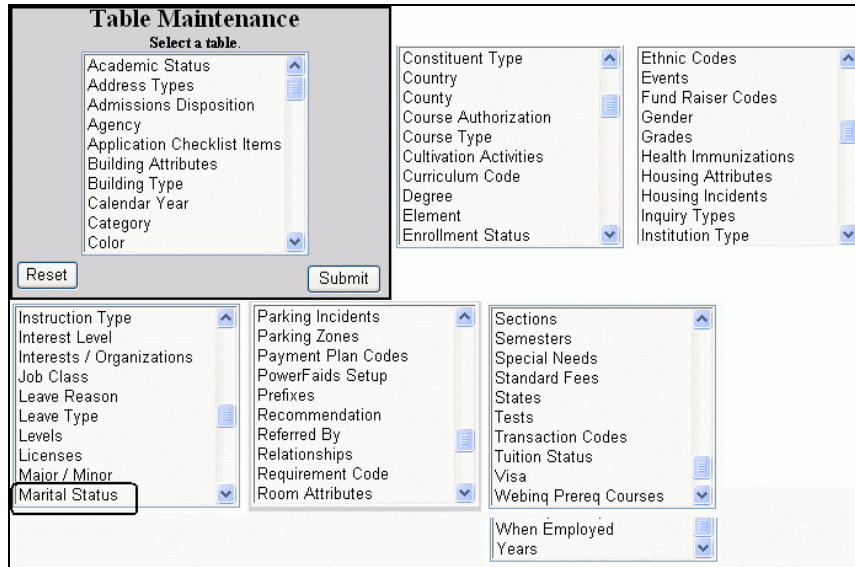
SETTING TABLES

Pulldown⁵ lists such as Figure 67 get their content from tables set up with SONISWEB® Table Maintenance. Use the SONISWEB® manual “Table Configuration & Maintenance” to see and change the tables.

The figures below show you the current list of table in Table Maintenance.



• Figure 67 Marital Code Pulldown List



• Figure 68 Table Maintenance Prompt as Montage

There are many tables. The Marital Status table from which Figure 67 is fed is shown in Figure 69.

Table Maintenance - <i>marital</i>				
ADD New Record		OR Edit Record (click on first field): Sort Order		
Disabled	Marital Code	Marital Status	xchar	xint
(disabled)	(mar_cod)	(mar_txt)	(mar_ce1)	(mar_ne1)
0	di	Divorced	x	0
0	ma	Married	x	0
0	se	Separated	x	0
0	si	Single	x	0
0	wi	Widowed	x	0

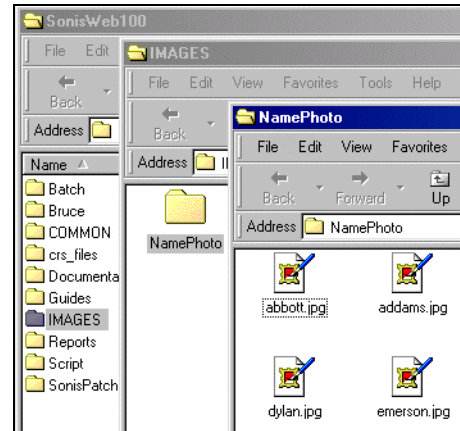
• Figure 69 Marital Status

The entries in this table are used in each person's biographic record as shown in Figure 67.

PHOTOS

In Figure 11 (“Biographic Display”, page 14), clicking Display Photo yields a photo of the person if one is stored and named in Figure 11. Figure 15 show a photo. These are the photo requirements.

- The photo is displayed by the browser not by SONISWEB®, so anything your browsers can display is acceptable.
- Browsers generally prefer jpg (JPEG), gif, or bmp files. Color and monochrome work equally well.
- The display size is limited so as not to obscure all of Figure 11. The pictures you store should be small, 2 inches by 3 inches, 5 cm by 8 cm.
- The photo files must be stored in a specific directory illustrated in Figure 70. It is:



• Figure 70 Photo Image File Storage

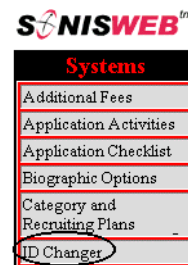
```
x\rootdirectory\SonisWeb200\Images\NamePhoto23
```

Where *x* is your disk drive and *rootdirectory* is the directory containing your SONISWEB® software.

²³ The “200” in the name means “SONISWEB® version 2.0”. As new releases are issued, the name will change to, for example, “210” for version 2.1.

ID CHANGER

Your role-profile must allow you to access **Systems** and **ID Changer** to change these tables.



• Figure 71 Systems Functions List with ID Changer

1. Click **Names** to get Figure 3, then enter the ID (the best choice) or the full name of the person whose ID you want to change.
2. Click the Search button.
3. If you entered an ID in Figure 3, you will get a display of the person's first record²⁴. If you get a list like Figure 4, you know you didn't enter the proper ID or the full names. Try it again until you see the person's first record displayed.

With the proper person selected, you have established the PID so that it will appear in the "Change PID" field in Figure 72.

4. Click **Systems** at the top of your display (Figure 1). You see Figure 71.
5. In Figure 71, click **ID Changer**. That yields Figure 72 with the "Change PID" filled in. The "to" field will be empty..
6. In Figure 72, enter the new ID in the "to" fields and then click the Submit button.

ID Changer

Change PID to

• Figure 72 ID Changer

To prevent duplicates, SONISWEB® checks to make sure only one person has an ID.

7. If there is a person who has the "to" ID, you get this rejection message at the bottom of the display (you may have to scroll to the bottom to see it). Otherwise the ID is changed.

ID JA5710794 already belongs to JAMESON, BRENDA

²⁴ The first record displayed is usually the Biographic record (Figure 11). In setting up the profile to which you are assigned, the SONISWEB® administrator may have specified another record as your "start" record.

DEALING WITH DUPLICATE PEOPLE-RECORDS

SONISWEB® doesn't allow you to enter an ID that's already assigned to another. If someone entered records for the same human with a different ID, you've got a duplicate record issue to solve. If you catch it early enough, it's easily solved.

Duplicate ID with No Records Entered

This is simple. Go to the Biographic record (page 18) and use the Delete button. With no records needing to be preserved, you get a response like Figure 73. Click the Confirm button and the person's record is gone.



• Figure 73 Delete a Person

If you meant to add a new status, not a new person, go to "Adding a New Status" on page 61.

If you get rejected with "Delete Denial" (Figure 17 on page 18) you must follow the process in "Duplicate ID Where Records Have Been Entered" below.

Duplicate ID Where Records Have Been Entered

Usually this occurs because someone added a new person then started entering records so that the process in "Duplicate ID with No Records Entered" above wouldn't work. The process can be lengthy and must be carefully done. These are guidelines; you need to figure out what needs to be done based on the person's records. You are "moving" the records from the duplicate ID to the original, correct ID. You move them by printing all the records, then re-entering them by hand.

If any financial transaction has been posted to accounting, you cannot delete the duplicate ID. See the alternative in Figure 74.

- Check all of the person's records. View each record (pages 11 to 47 in this text). Print those records present. You can use the print icon at the top of your browser.
- Pay special attention to the Courses records. You will need to recreate those records to get the credits, GPA, and transcript correct. Print the grade reports and transcript for the ID being "moved". See the SONISWEB® text "Course & Section Processing" for guidance.
- With the help of your financial and financial aid staffs, view the receivables and financial aid records. They will advise you on which records need to be recreated and which can be ignored. Print the appropriate financial reports or the financial records that you need to recreate the records. The SONISWEB® text "Financial Record-keeping and Billing" is your guide.
- Access the original, correct ID using Figure 3 and Figure 4. Enter the records you printed above to "move" the information to the correct ID

- Check all of the records you have reentered against those you printed above. Carefully compare the transcript and the billing balances to make sure you got the right results.
- Actually deleting the records requires that you eliminate every record for this person then use “Duplicate ID with No Records Entered” above. That can be difficult to do. Financial records that have been posted to accounting cannot be deleted.

<input checked="" type="checkbox"/>	Removed Adams, Oscar	444444442	Student	Daytime	Centerville East Campus
-------------------------------------	----------------------	-----------	---------	---------	-------------------------

Figure 74 Marking a Name

- An alternative is to change the name of the person in the biographic record (page 18) by adding a code word like “removed” so that you can see that they are no longer relevant as shown above.
- Click the Disabled checkbox in the Biographic record (Figure 11) so he or she can no longer log on.
- Add a Remark to the Biographic record so you know what happened.

INTRODUCTION TO KEEPING THE PEOPLE-RECORDS

SONISWEB® keeps student, faculty, alumni/ae, applicant, prospective student, staff, and constituent records in a set of databases called “name”, “address”, “nmref” (references), “nmedu” (educational background), etc. The SONISWEB® displays are nearly identical for the different people in the system. As Figure 87 (page 67) illustrates, information at the top of the display tells you which records you are viewing.

Summary of Roles or “People-Statuses”

With SONISWEB® a person can serve more than one role in your institution. He or she can be a faculty member (FA) and take courses as a student (ST). A student can also be an applicant (AP) for another course of study. Staff (SF) often teach, so are part of your faculty (FA). An “alum” (AL) can also be a prospective student (PS) for further education. A former student who did not graduate normally has a status of Withdrawn (WD). SONISWEB® keeps track of the multiple roles by giving the person multiple statuses. Each person has only one set of records²⁵ no matter how many statuses or roles. The titles and meanings of the statuses or roles are built into SONISWEB® and shown in Figure 75. As you select people-records, you are offered a list of statuses from which to pick.

mod_stat	mod_txt	sortorder
AL	Alumni	4
AP	Applicant	5
CO	Constituent	7
FA	Faculty	2
OA	Online App	8
PS	Prospect	6
SF	Staff	3
ST	Student	1
WD	Withdrawn	9

• Figure 75 Roles or Statuses of Persons

Constituent (CO) may be new to you. This is a person – graduate or not – who contributes money and/or time to your institution for its betterment.

An Online Applicant (OA) enters his or her application directly over the Web and thus bypasses the Prospective Student (PS) to Applicant (AP) process described on page 58.

²⁵ That is not quite a true statement. There are a few specialized records or additions to records for faculty members, constituents (contributors), prospective students, etc. However, there is only one set of address records, one biographic record, etc. There is one – and only one – ID number for a person, no matter the number of records or roles the person has.

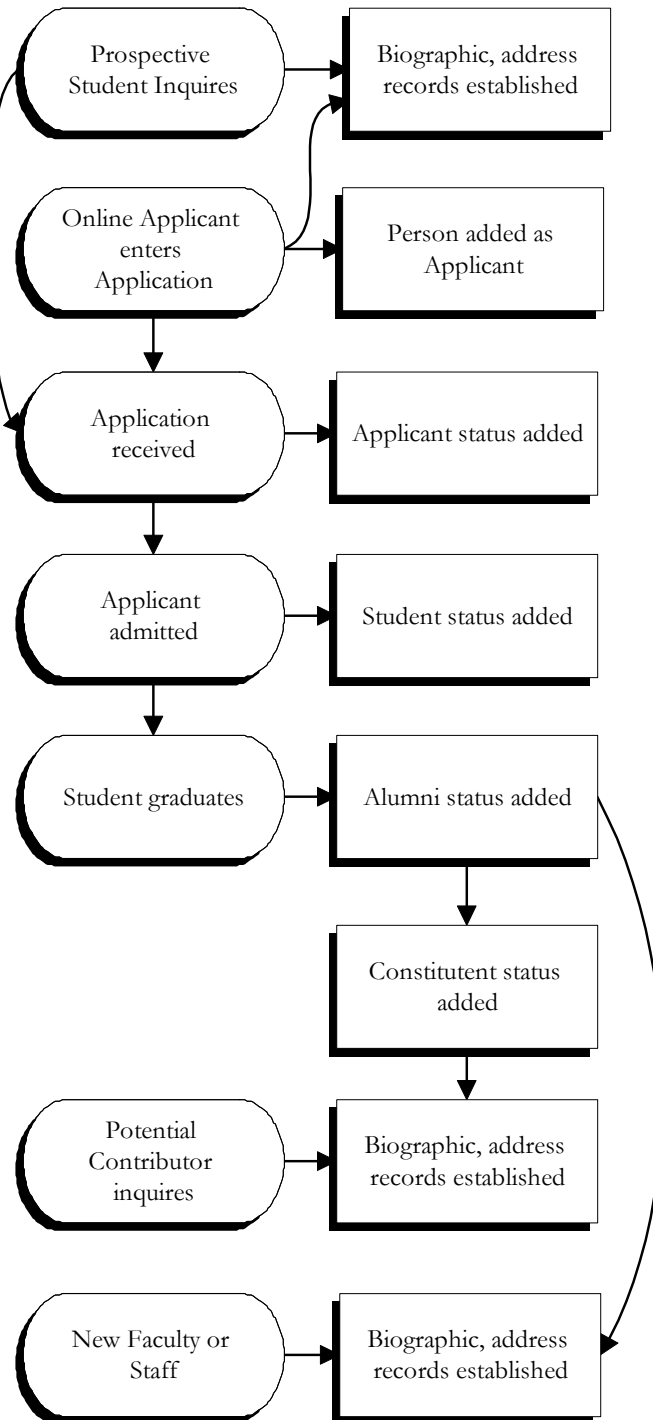
Information and Records Flow within SONISWEB®

A person can enter your SONISWEB® people-databases at any point and with any role (see “Summary of Roles or “People-Statuses”” above). Most of the people in your database will probably enter the top of Figure 76 and “flow” down the process as they matriculate then graduate.

SONISWEB® Texts You Need for the Details

This text is a general overview of the records. For certain people, there are specialized texts that provide much more detail. Those records are covered in detail in these SONISWEB® texts:

- Applicants:** “Applicant Checklists, Activities, and Disposition”
- Constituents:** “Development and Fund Raising”
- Course records** for all: “Course & Section Processing”
- Financial records** for all: “Financial Record-keeping and Billing”
- Housing records** for all: “Housing”
- Parking records** for all: “Parking”
- Prospective Students:** “Recruiting Prospective Students”
- Students:** “Graduation and Promotion”



• Figure 76 Typical Record Flows

Changing Status - Prospect to Applicant to Student to Graduate

Prospective Student to Applicant

Once a prospective student (PS) sends in her or his application and any fees required, you mark his or her record as an applicant (AP). That “adds” a new role (status) for that person. You are simply adding a new role to the records you collected while she or he was a prospective student. How to do all that is described in the SONISWEB® text “Recruiting Prospective Students”.

Applicant to Student

An applicant (AP) had transcripts and references sent to you. You enter the information in her or his records. Your admissions committees meet and decide acceptance or not. The applicant accepts admission and you change him or her from an applicant to a student (ST). That process and the records are described in the SONISWEB® text “Applicant Checklists, Activities, and Disposition”.

The process of adding new roles can be automated. In Web Options (see the text “Web Options”), you can set an option to automatically add a status for an applicant as student or a prospective student as applicant when she or he is marked as such in the application or prospect details records. To see how this works, see the texts “Applicant Checklists, Activities, and Disposition” and “Recruiting Prospective Students”.

Student to Graduate

As the student matriculates, you accumulate many course and financial records. Those records are described in other texts (see “SONISWEB® Texts You Need for the Details”, page 57). On graduation, SONISWEB® automatically “adds” alumni (AL) status and usually constituent (CO) status to the person’s record. That is covered in the SONISWEB® text “Graduation and Promotion”.

Adding a New Person

If a person already exists in your system, you should not add him or her as a new person. You should use the procedure in “Adding a New Status” below.

Duplicate records for the same person can cause problems for you in billing, grade reports, course assignments, GPA, and transcripts. You should carefully check that the person does not exist in your current records. Try searches (Figure 3, page 7) with various spelling of the names – Mc and Mac, van Dorn and vanDorn – to be certain that this “new” person is not in your records. See “Dealing with Duplicate People-Records” on page 54.

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

• Figure 77 Names Search to Prevent Duplicates

• Figure 78 Alternative Name Search

2. Enter as much of the name as you know in Figure 77 and search to make sure the person’s record is not already present²⁶.
3. Consider doing an Alternative Search marked at the bottom of Figure 77. It’s shown in Figure 78.
4. If you’re certain the person doesn’t exist in your records, click **Names**, Figure 1. The information you entered in Figure 77 is preserved so you can proceed to add the person as shown in Figure 79.

²⁶ A prospective student may have entered an online application or could be an alum or a constituent, so it’s worth a check.

The form is titled "Name Search". It contains the following fields and controls:

- PID:** An empty text input field.
- OR:** A radio button.
- Last:** Text input field containing "Wilson".
- First:** Text input field containing "Woodrow".
- MI:** Text input field containing "W".
- Status:** A dropdown menu with options: Faculty, Online App, Prospect.
- Division:** A dropdown menu with options: Business, College, Daytime.
- Campus:** A dropdown menu with options: Centerville South Campus, Chatham CC Circlesville, College.
- Dept.:** A dropdown menu with options: COM, Day, Eng.
- Level:** A dropdown menu with options: High School, Freshman, Sophomore.
- Buttons:** "Reset", "Search", "Clear", and "Add Name/Record Status".

Annotations in the image include:

- A box labeled "Pick one from each category" with arrows pointing to the Status, Division, and Campus dropdowns.
- A box labeled "Click the button" with an arrow pointing to the "Add Name/Record Status" button.

• Figure 79 Names Display

5. Select one of each of these from the middle of Figure 79:

Record Status: Select one, Prospect, Applicant, Faculty, Constituent, etc.

Division: Pick the division you know or estimate this person will be allied with.

Campus: Select the campus.

Department: Select the department.

Level: select a level. You may have a level²⁷ for non-students such as faculty and constituents.

The form is titled "Biographic" and has a subtitle "Adding: Prospect (Law /Centerville South Campus)". It contains the following fields:

- Last **:** Text input field containing "Patten".
- MI:** Text input field containing "M".
- PID:** Text input field containing "System-Generated".
- SSN:** Text input field containing "035192785".
- First **:** Text input field containing "George".
- DOB **:** Text input field containing "10/14/1978".
- Electronic Mail **:** Text input field containing "georgem@vet.net".

Buttons: "Reset" and "Submit".

• Figure 80 New User Information

6. Click the Add button. You get Figure 80.
7. Enter the person's information in Figure 80. If your school uses automatically generated IDs, you see "System-Generated" for PID. If not and you have an ID²⁸, enter it. If you don't know the Electronic Mail (E-mail) address, enter a ?.
8. Click the Submit button at the bottom of Figure 80. You get Figure 81.

²⁷ Level is set in a table. See "Setting Tables" on page 50.

²⁸ ID, also called PID, is the student's number. Whatever it is, it must be 9 characters long with no hyphens or other punctuation.

9. Click the BIOGRAPHICAL line in Figure 81. You see the person's biographic record.
10. Fill out the Biographic²⁹ record with all the information you have available. Click the Submit button.
11. Click Address²⁹ in Figure 2. Enter the address information (Figure 2). Click the Submit button.

Biographic
Adding: Prospect

George Patten (PA7461579) Added.

[Go to the above's BIOGRAPHICAL record.](#)

[Go to the above's ADDRESS record.](#)

[Return to the NAME SEARCH / ADD NEW USER page.](#)

• Figure 81 Adding a Prospect

For certain U. S. government financial functions – government secured loans for example – you must add the person's U. S. Social Security Number in the SSN field in Figure 11.

Adding a New Status

Often a faculty (FA) or staff (SF) member takes courses. You need to add a new status (role) of student (ST) for that person, not add them as a new person. You also use this to make a graduate student (ST) or staff member (SF) part of the faculty (FA) so he or she can be assigned courses to teach or students to advise as described in "Faculty Additions to the Biographic Record" on page 18.

1. Start as you would in "Adding a New Person" above.
2. In Figure 77, carefully and accurately enter the person's name and her or his PID. The PID is the key to matching to the existing person.

If you do not get the PID right, you will create a set of duplicate records for this person. To see how much trouble this is, look at "Dealing with Duplicate People-Records" on page 54.

3. Click the Submit button. You get Figure 82.

Biographic
Adding: Faculty

Last Adams	First Oscar
MI	PID 11111111
DOB 03/01/1979	Electronic Mail

NEW STATUS CAN BE ADDED, OR CURRENT REPLACED:
[Adams , Oscar \(Student - 11111111\)](#)

Adams, Oscar (11111111) already exists but NOT as a Faculty.
Note: The name you entered was Adams, Oscar.

• Figure 82 New Status Selection

²⁹ Most of the record data are self-evident. For more information on the biographic and address records, see the SONISWEB® text "Students, Faculty, Applicant and Alumni/ae Record-keeping".

- Pick the underlined name with your mouse button unless this is the wrong person. In that case, click the Quit button and start over.

Biographic
Adding: Faculty

Last Adams	First Oscar
MI	PID 111111111
DOB 03/01/1979	Electronic Mail

Oscar Adams (111111111)

Add FACULTY to this user's record.

Change STUDENT to FACULTY

• Figure 83 Adding a New Status

- In Figure 83, chose the underlined Add... phrase to add the status. You get a confirmation and the person now has the new status.

Where the person's status has truly changed and the old status should be dropped, use the underlined Change... phrase in Figure 83 to drop the old status.

Delete Status

You can delete a status assigned to a person without deleting the person. So if the person was a teaching assistant with both ST (student) and FA (faculty) statuses and she or he is no longer a teaching assistant, you can delete the FA status and leave the ST status.

1. Search for the person's records as shown in "Names Search" on page 7.

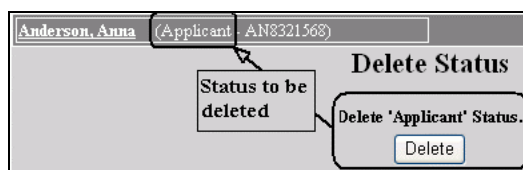
You must search for the person by selecting in Figure 3 the status you want to delete. You should see that status in the Biographic record like this

Status	FA
--------	----

.

2. Once you have the person's record list like Figure 2, click **Systems** in Figure 1. You get the Systems version of Figure 2.
3. Click Delete Status from the function list. You see Figure 84.

4. Figure 84 confirms that this is the status you want deleted.
5. If both the name and status are correct, click the Delete button. You'll get a confirmation that it's deleted.



• Figure 84 Delete Status

6. If either the name or the status is wrong in Figure 84, click **Names** in Figure 1 and search for the person with the correct status, then go through the delete status steps again.

RECORDS BY STATUS

This is the list of records viewable by status as of this edition of the manual. A person may have all of these records but you can only view those tied to a specific status. For example, the Pledge record will only appear when viewing the person as a Constituent even if the person is also a student and a faculty member. Your security limits set by user authorization and profiles means that most users will never see all the records for a person-status.

• Table 1 Records by Status 1 of 2

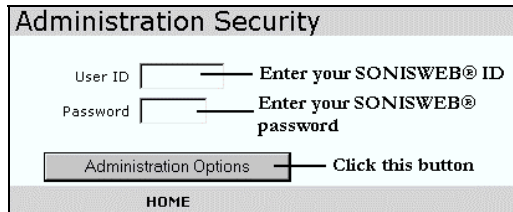
Alumni (AL)	Applicants (AP)	Constituents (CO)	Faculty (FA)
Activities	Activities	Activities	Activities
Address	Address	Address	Address
Advisors	Advisors	Balances	Biographic
Application	Application	Biographic	Citizenship Information
Biographic	Biographic	Citizenship Information	Education
Citizenship Information	Checklist	Constituent Information	Employment
Courses	Citizenship Information	Cultivation Activities	Parking
Education	Courses	Display Photo	Parking Incidents
Employment	Disposition	Employment	Post Tuition Tcodes
Financial Aid	Education	Interests	Salary, Faculty
Interests	Employment	Licenses	Schedule
Leave Status	Essay Memo	Parking	Tenure Activities
Licenses	Financial Aid	Parking Incidents	Tenure Admin. Assignments
Majors	Health	Payment History	Tenure Awards
Parking	Holds	Pledge	Tenure Committees
Parking Incidents	Housing Assignment	Pledge Payments	Tenure Grants
Payment Plans	Housing Incidents	Relationships	Tenure Publications
Post Tuition Tcodes	Housing Post Related Charges	User Security	Tests: Additional
Programs	Housing Preferences	Void Pledge/Payments	User Security
Records	Interests	Volunteer	
Relationships	Leave Status		
Schedule	Licenses		
Special Needs	Majors		
Tests: ACT / SAT	Parking		
Tests: Additional	Parking Incidents		
User Security	Payment Plans		

• Table 2 Records by Status 2 of 2

Online Applicant (OA)	Prospect[ive Student] (PS)	Staff (SF)	Student (ST)	Withdrawn [Student] (WD)
Activities	Activities	Activities	Activities	Activities
Address	Address	Address	Address	Address
Advisors	Application	Biographic	Advisors	Advisors
Application	Biographic	Citizenship Information	Application	Application
Biographic	Citizenship Information	Display Photo	Biographic	Biographic
Checklist	Display Photo	Education	Citizenship Information	Citizenship Information
Citizenship Information	Education	Employment	Courses	Courses
Courses	Interests	Fundraising	Display Photo	Display Photo
Display Photo	Parking	Parking	Education	Education
Disposition	Parking Incidents	Parking Incidents	Employment	Employment
Education	Post Tuition Tcodes	Post Tuition Tcodes	Financial Aid	Financial Aid
Employment	Programs	Schedule	Health	Health
Essay Memo	Prospect Inquiry Details	Tests: Additional	Holds	Holds
Financial Aid	Prospect Inquiry Extra	User Security	Housing Assignment	Housing Assignment
Health	Relationships		Housing Incidents	Housing Incidents
Holds	Schedule		Housing Post Related Charges	Housing Post Related Charges
Housing Assignment	Special Needs		Housing Preferences	Housing Preferences
Housing Incidents	Tests: Additional		Interests	Interests
Housing Post Related Charges	User Security		Leave Status	Leave Status
Housing Preferences			Licenses	Licenses
Interests			Majors	Majors
Leave Status			Parking	Parking
Licenses			Parking Incidents	Parking Incidents
Majors			Payment Plans	Programs
Parking			Post Tuition Tcodes	References
Parking Incidents			Programs	Registration
Post Tuition Tcodes			Prospect Inq	Relationships
Programs			References	Schedule
References			Registration	Special Needs
Registration			Relationships	Tests: ACT / SAT
Relationships			Schedule	Tests: Additional
Schedule			Special Needs	Transfer Registration
Special Needs			Tests: ACT / SAT	User Security

Online Applicant (OA)	Prospect[ive Student] (PS)	Staff (SF)	Student (ST)	Withdrawn [Student] (WD)
Tests: ACT / SAT			Tests: Additional	
Tests: Additional			Transfer Registration	
Transfer Registration			User Security	
User Security				

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



Administration Security

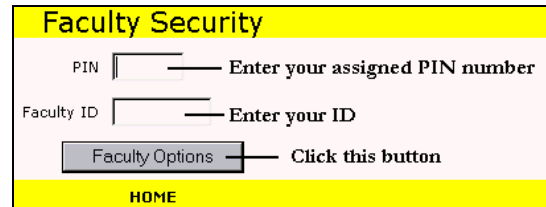
User ID Enter your SONISWEB® ID

Password Enter your SONISWEB® password

Click this button

HOME

• Figure 85 Administrator login



Faculty Security

PIN Enter your assigned PIN number

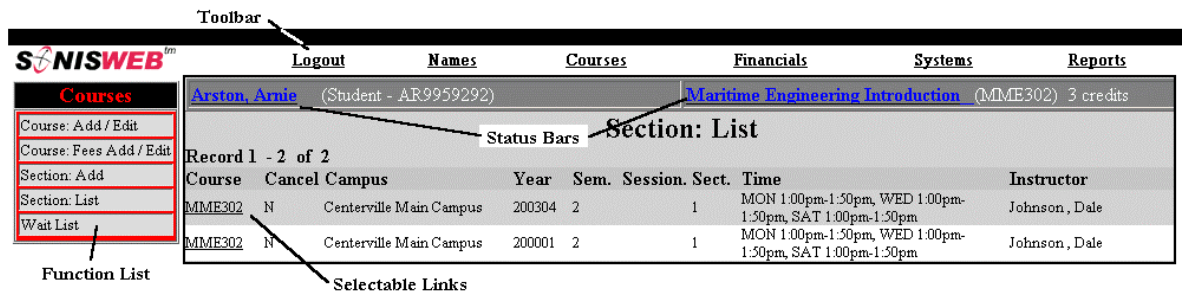
Faculty ID Enter your ID

Click this button

HOME

• Figure 86 Student and other login

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 85 or Figure 86.



Toolbar

SONISWEB™ Logout Names Courses Financials Systems Reports

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

Section: List

Status Bars

Record 1 - 2 of 2

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

Function List

Selectable Links

• Figure 87 Typical SONISWEB® Page

Figure 87 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

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

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

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

In Figure 87 click an underlined **Selectable Link** and you go to that record.

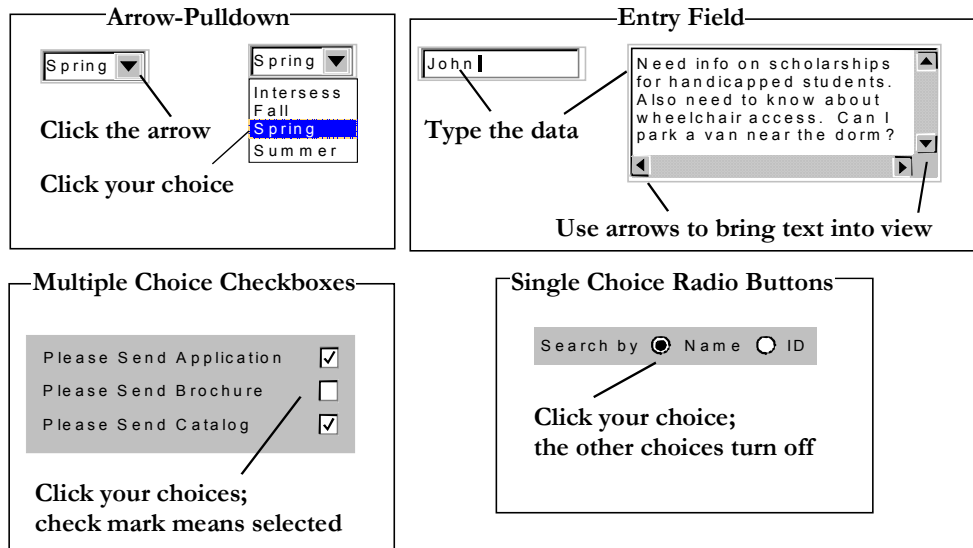


Figure 88 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 88. Use your mouse to click your selection.

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

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

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 89.



• Figure 89 Selecting Multiple Choices

- To pick two or more that are not adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 89.