SONISWEB®

Scholastic ONline Information System

for the Web

Timed Letters, Timed E-Mail & Timed Mail-Merge

This text covers Timed Letters, a one-step process for form letters, Timed E-Mail, a one-step process for e-mail notes, and Timed Mail-Merge, a two-step process for creating mailing labels and/or more complex letters and mailings. They are used for communications with prospective students, for announcements to Alumni/ae, and for fund raising information for Constituents.

The steps leading up to these timed activities are described in the SONISWEB® texts "Applicant Checklists and Disposition", "Recruiting Prospective Students", and "Development and Fund Raising".

If it's not a timed letter or e-mail note, see the SONISWEB® text "Mail, E-Mail Merge, and Mailing Labels"

March 2006

RJM Systems, Inc.

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(TimedLetters.doc - 03/27/06 3:49 PM)

NEW IN THIS EDITION

- This edition is for SONISWEB® version 2.0. A few of these changes were also added to version 1.4.
- Figure 1 Toolbar for those with User-ID access and Figure 2 Function Lists1 - Partial, page 4.
- Figure 26 Login Displays and Figure 27 Typical SONISWEB® Page, page 27.
- 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.
- "Choosing Among E-Mail, Letters, Query Builder, and Mail-Merge", page 7.
- "Starting Timed Letters, Notes, and Mail-Merge", page 9.
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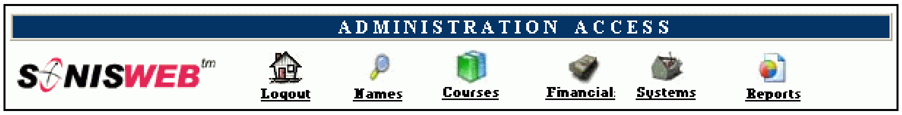
NAVIGATING THE FUNCTIONS



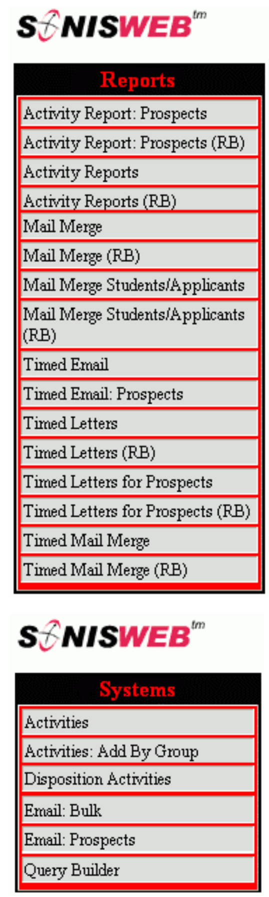
• Figure 1 Toolbar[1] for those with User-ID access

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

The access rights of an administrative user are defined by:

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

In Figure 1 click **Reports** to get the list at the top of Figure 2. Click **Systems** in Figure 1 to get the selections shown at the bottom of Figure 2.

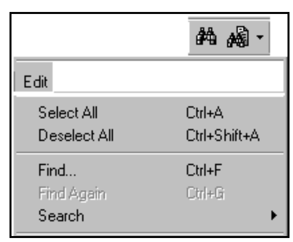


• Figure 2 Function Lists[1] - Partial

[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.

WHAT DO YOU WANT TO DO?

- Activities and their uses beyond timed correspondence, page 25.
- Bulk E-mail see the SONISWEB® text “Mail, E-Mail Merge, and Mailing Labels”.
- Choosing Among E-Mail, Letters, Query Builder, and Mail-Merge, page 7.
- Composing and Setting up Timed Letter and E-mail Activities, page 20.
- E-Mail Merge see the SONISWEB® text “Mail, E-Mail Merge, and Mailing Labels”.
- Mail Merge see the SONISWEB® text “Mail, E-Mail Merge, and Mailing Labels”.
- Mailing labels see the SONISWEB® text “Mail, E-Mail Merge, and Mailing Labels”.
- Old Information in Letters and Notes, page 6.
- Query Builder for special selections to sent e-mail notes or build mailing lists, page 12.
- Salutation Choices, page 24.
- Sending Timed E-Mail Notes, page 10.
- Starting Timed Letters, Notes, and Mail-Merge, page 9.
- Timed Letters, page 13.
- Timed Mail-Merge, page 17.
- Timing and ‘Delta Days’ Explained, page 23.
- Viewing and Printing Timed Letters, page 16.
- If you don’t see what you need above, check the table of contents on page 2. You can also use the Adobe® find or search functions illustrated in Figure 3. It allows a Google®-like search[2] by word or phase.



• Figure 3 Adobe® Find and Search

Diagnosing and Fixing Problems

See the text “Messages, Errors, and Diagnosis”.

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

Setting Your Browser for Proper Function and Security

Internet Explorer[3] (IE), Firefox™, Netscape®, and Opera Web browsers have an "auto-complete" or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text "Browser Settings" to set your browser for security, good performance, and to prevent your getting old data.

Old Information in Letters and Notes

Timing off? If you find you are getting the same timed letters or e-mails you have already sent, it may be a problem with your Web browser setting. Strange as that may seem, Web browsers do odd things if not set properly. See the text "Browser Setting" (Browser Settings.pdf) to make sure yours is set so you do not get old data.

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

CHOOSING AMONG E-MAIL, LETTERS, QUERY BUILDER, AND MAIL-MERGE

- E-Mail is quicker and simpler than paper mail but it requires that all the recipients have valid e-mail addresses in your address records. Some recipients don't regard e-mail as having the seriousness and prestige of paper mail, so for some mailings, paper has an advantage.
  - **Bulk Email** ("Email: Bulk") allows you to send an e-mail note to any group at any time. It's not triggered by a timed activity nor does it use a stored message like the timed versions. It's covered in the SONISWEB® manual "Mail, E-Mail Merge, and Mailing Labels".
  - **Email Prospects** is like "Timed Email: Prospects" but it's not triggered by a timed activity. It uses selection criteria unique to prospective students. It's covered in the SONISWEB® manual "Recruiting Prospective Students".
  - **Timed Email: Prospects** uses selection information unique to prospective student records such as Term of Interest and Agency. It's covered in the context of its use in the SONISWEB® manual "Recruiting Prospective Students".
  - **Timed Email** applies to anyone in your records if they have a timed activity set.
  - **Query Builder** is an alternative when you want the e-mail to go to a more selective list of people than offered by the standard e-mail or mail prompts.
- Paper mail is best when you need to send brochures or other inserts as well as a letter. When a substantial number of your intended recipients lack valid e-mail addresses, paper mail is your best choice.
  - **Timed Letters (RB)**[4] is a simple one-step process to produce a simple form letter.
  - **Timed Letters for Prospects (RB)**[4] is a simple one-step process that uses selection information unique to prospective student records such as Term of Interest and Agency.
  - **Timed Mail Merge (RB)**[4] is a two step process designed for more formal letters with a selection of type fonts and the inclusion of graphics. You use a word processor like Microsoft® Word as the second step.
- For mailing and e-mail not connected to a timed Activity:
  - **Email Bulk** lets you specify a group you want to get the e-mail note and compose the note, all on one display.
  - **Mailing labels (RB)**[4] can use both standard and specially designated addresses so that, for example, labels can be produced for both students and their parents.

[4] 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 but they don't have any of the enhancements in them.

It's covered in the SONISWEB® manual "Mail, E-Mail Merge, and Mailing Labels".

- **Mail Merge: Students/Applicants (RB)**[4] allows you to select the person's primary and auxiliary addresses. You can mix paper mail and e-mail in one mailing with this two-step process. (It's a three-step process when you send e-mail notes and paper letters.) It's covered in the SONISWEB® manual "Mail, E-Mail Merge, and Mailing Labels".
- **Mail Merge (RB)**[4] is similar to Timed Mail Merge but not tied to an Activity. In addition, primary and auxiliary addresses can be selected. You can mix paper mail and e-mail in one mailing with this two-step process. It's covered in the SONISWEB® manual "Mail, E-Mail Merge, and Mailing Labels".
- **Query Builder** is an alternative when you want the list of addresses for mail merge or e-mail to go to a selective list of people.

TIMED LETTERS AND E-MAIL NOTES VERSUS FORMAL PAPER AND E-MAIL MAILINGS

Timed letters and Timed E-Mail notes are designed as a quick one-step processes. You compose a form letter, a note, or an announcement as part of the activity definition (page 20), specify its timing and then print and mail the letters or send the notes by e-mail. The letters and notes are a collection of simple paragraphs, there is no control of fonts, headings, or graphics. For applicants they can optionally contain a list of incomplete checklist items as well.

Mailing labels are designed when you only want to send a brochure or other pre-printed item. It's a simple one-step process.

Your other option is formal mailings – letters, brochures, invitations – which use a two-step process. You compose the letter or brochure using a word processor like Word, WordPerfect®, StarOffice™, OpenOffice™, or WordPro™. Then you run one of the SONISWEB® mail merge "reports" or Query Builder lists. Each "report" or list is really a mailing list that you export from SONISWEB® and use in the merge process. In return for a two-step process, you can control the look of the letter or brochure including type fonts and the inclusion of graphics. The timed version of these formal mailings is described on page 17. To understand how these mailings are used, see the SONISWEB® texts "Applicant Checklists, Activities, and Disposition" or "Recruiting Prospective Students" or "Development and Fund Raising".

STARTING TIMED LETTERS, NOTES, AND MAIL-MERGE

First you compose the letter or note in "Setting up Timed Letter and E-mail Activities" on page 20. Once they are composed, follow the steps below to print the letter, send the e-mail note, or create the mailing list for mail-merge.

1. Log on to SONISWEB® (page 25).
2. Select **Reports** from the tool bar (Figure 1). You get Figure 2.

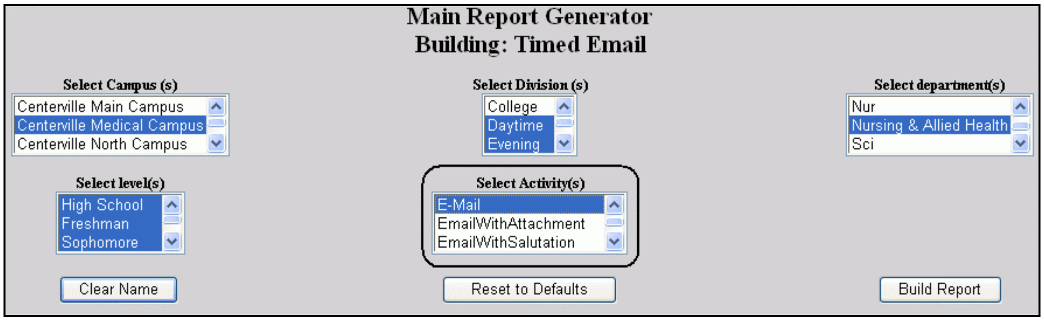
Your security profile must be set for you to access the reports. If **Reports** or the report list are not offered, see your SONISWEB® administrator.

SENDING TIMED E-MAIL NOTES

1. From the list in Figure 2, click either:

   Timed Email that yields Figure 4.

   Timed Email: Prospects that gives you Figure 5.



• Figure 4 Timed E-Mail Prospects (RB) Prompt

• Figure 5 Timed E-Mail Prospects Prompt

2. In Figure 4 (general timed e-mail) or Figure 5 (timed e-mail for prospective students) select the applicable campuses[5], divisions[5], departments[5], and levels[6], etc.
3. Select the one[7] Activity that contains the text of your e-mail note (see Figure 21, page 21).

You see only those Activities set for e-mail. "Setting up Timed Letter and E-mail Activities" on page 20 shows how these Activities are set up.

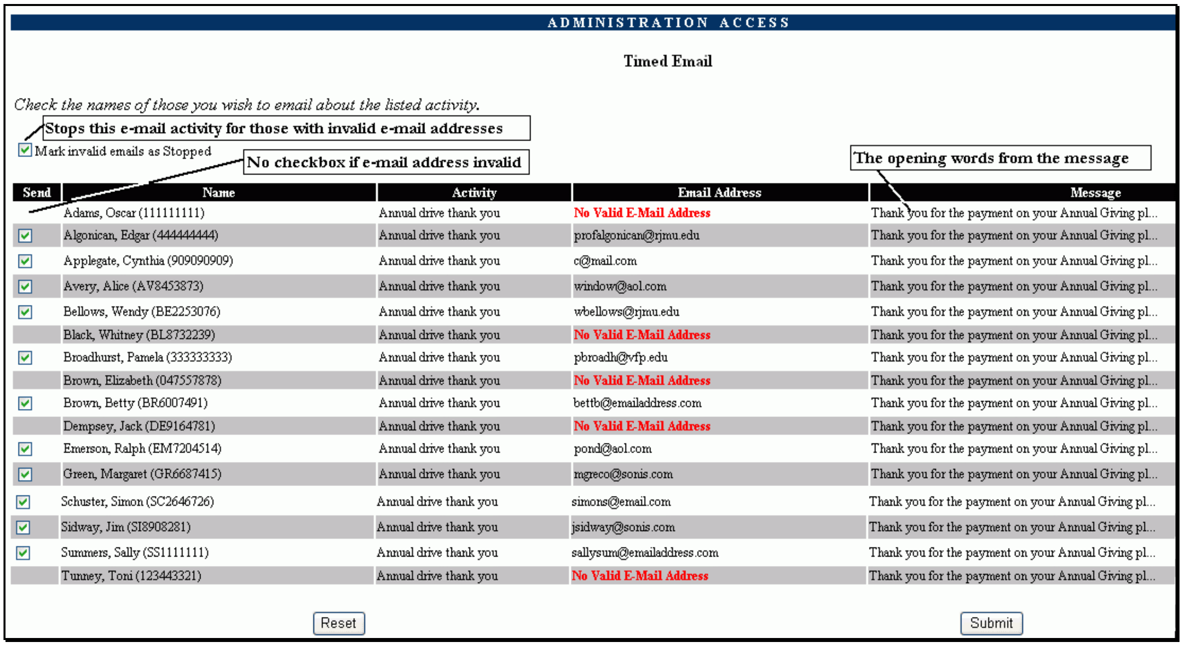
4. Click the Build Report button.
5. SONISWEB® searches the databases for persons meeting the criteria you chose in Figure 4 or Figure 5.

[5] You select one with your mouse by clicking it. To select more than one, see Figure 29 "Selecting Multiple Choices" on page 28 for guidance in selecting multiple items from a list.

[6] Levels, also called class-year, only make sense for Students and Withdrawn students. For all others, leave all levels selected.

[7] You can select more than one activity, but that can get confusing since it's difficult to check that the correct person is getting each note.

6. You get a display with Preview Report. Click it and you see Figure 6.



ADMINISTRATION ACCESS

Timed Email

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

Stops this e-mail activity for those with invalid e-mail addresses

☑ Mark invalid emails as Stopped

No checkbox if e-mail address invalid

The opening words from the message

Send	Name	Activity	Email Address	Message
	Adams, Oscar (111111111)	Annual drive thank you	No Valid E-Mail Address	Thank you for the payment on your Annual Giving pl...
☑	Algonican, Edgar (444444444)	Annual drive thank you	profalgonican@rjmu.edu	Thank you for the payment on your Annual Giving pl...
☑	Applegate, Cynthia (909090909)	Annual drive thank you	c@mail.com	Thank you for the payment on your Annual Giving pl...
☑	Avery, Alice (AV8453873)	Annual drive thank you	window@aol.com	Thank you for the payment on your Annual Giving pl...
☑	Bellows, Wendy (BE2253076)	Annual drive thank you	wbellows@rjmu.edu	Thank you for the payment on your Annual Giving pl...
	Black, Whitney (BL8732239)	Annual drive thank you	No Valid E-Mail Address	Thank you for the payment on your Annual Giving pl...
☑	Broadhurst, Pamela (333333333)	Annual drive thank you	pbroadh@vfp.edu	Thank you for the payment on your Annual Giving pl...
	Brown, Elizabeth (047557878)	Annual drive thank you	No Valid E-Mail Address	Thank you for the payment on your Annual Giving pl...
☑	Brown, Betty (BR6007491)	Annual drive thank you	bettb@emailaddress.com	Thank you for the payment on your Annual Giving pl...
	Dempsey, Jack (DE9164781)	Annual drive thank you	No Valid E-Mail Address	Thank you for the payment on your Annual Giving pl...
☑	Emerson, Ralph (EM7204514)	Annual drive thank you	pond@aol.com	Thank you for the payment on your Annual Giving pl...
☑	Green, Margaret (GR6687415)	Annual drive thank you	mgreco@sonis.com	Thank you for the payment on your Annual Giving pl...
☑	Schuster, Simon (SC2646726)	Annual drive thank you	simons@email.com	Thank you for the payment on your Annual Giving pl...
☑	Sidway, Jim (SI8908281)	Annual drive thank you	jsidway@sonis.com	Thank you for the payment on your Annual Giving pl...
☑	Summers, Sally (SS1111111)	Annual drive thank you	sallysum@emailaddress.com	Thank you for the payment on your Annual Giving pl...
	Tunney, Toni (123443321)	Annual drive thank you	No Valid E-Mail Address	Thank you for the payment on your Annual Giving pl...

Reset Submit

• Figure 6 Timed E-Mail (RB) "Report" Example[8]

7. Check the Message column in Figure 6 to make sure it's the message you want to send. It's the first few words of the note that you entered in Figure 21, page 21.

> For e-mail notes, the Activity description (page 20) becomes the **Subject** line in the e-mail header.

8. If you have invalid e-mail addresses in Figure 6 print the display[9] or write down the names. You'll have to contact these people in some other way.

9. The checkmark beside "Mark invalid emails as Stopped" means these persons will have "Date Stopped" marked in their record for this activity. Those with valid addresses will have "Date Completed" marked. You see the effect in Figure 24 and Figure 25.

10. The checkboxes with checkmarks in them means "send the e-mail note to these persons". If do not want to send the note to certain people in the list, click their checkboxes[10] until the checkmarks disappear.

11. To reset your changes in Figure 6 and start over, click the Reset button.

12. To send the e-mail notes, click the Submit button. You now switch to your e-mail system.

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[8] Seen this list before? Are you seeing old data? If so, check "Old Information in Letters and Notes" on page 6. You may have a browser setting problem.

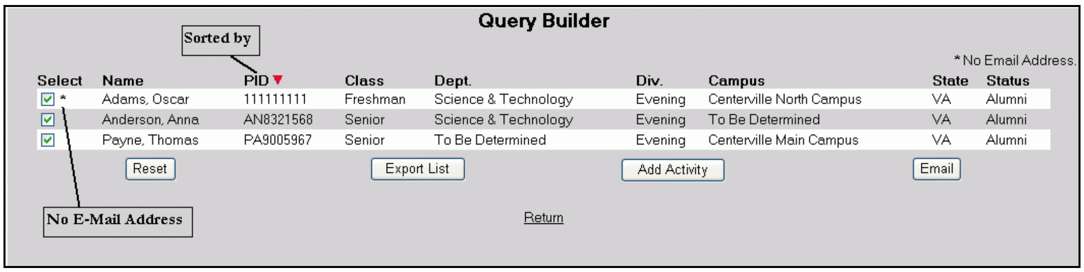
[9] Use the printer icon on your browser to print the display.

[10] See Figure 28 "Arrows, Fields, Checkboxes and Buttons" on page 28 for guidance.

> If you have problems getting the e-mail notes sent, contact your technical support staff. The problem is usually in the setup of your e-mail system or your security system, not in SONISWEB®.

13. SONISWEB® automatically posts this activity as completed (or stopped for those without valid e-mail addresses). See Figure 24 and Figure 25 for an example of what this posting looks like.

QUERY BUILDER FOR E-MAIL AND MAIL MERGE



• Figure 7 Query Builder Results

If you want to send an e-mail note or a letter to a group with more selective criteria, such as a specific city and state, for example, Query Builder is an alternative. Figure 7 shows the output of a query and the buttons that let you create a mailing list, group activities, or e-mail notes.

The Export List button in Figure 7 gives you a spreadsheet file to used for a mail merge.

The Email button in Figure 7 opens an e-mail composition display.

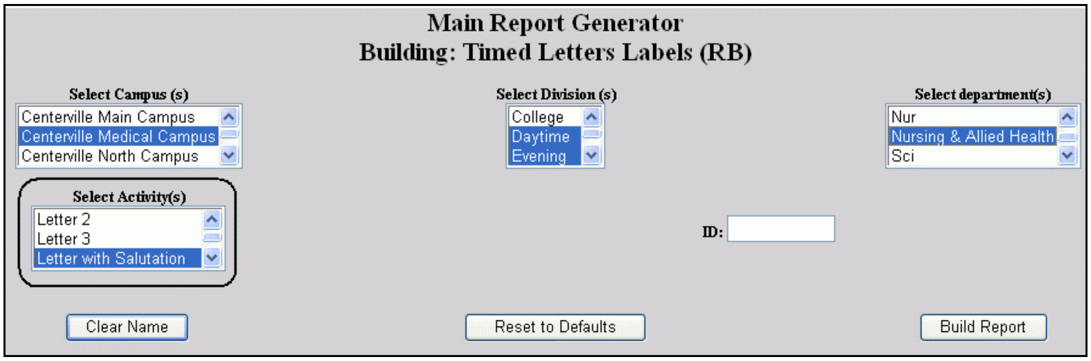
If you're authorized to use it, see the SONISWEB® manual "Query Builder" for guidance in using it.

TIMED LETTERS

1. From the list in Figure 2, click either:

   Timed Letters (RB)[4] that yields Figure 8.

   Timed Letters for Prospects (RB)[4] that yields Figure 9.



• Figure 8 Timed Letters (RB) Prompt

• Figure 9 Timed Letters (RB) for Prospects

2. In Figure 8 select the applicable campuses[5], programs[5], etc.
3. Select the one[7] Activity you want (see Figure 21, page 21).

You only see those Activities set for letters. "Setting up Timed Letter and E-mail Activities" on page 20 shows how these Activities are set up.

4. Click the Build Report button. You can limit the letter to a single person by entering her or his ID[11].

If you have been processing a person's records, you may find his or her ID[11] in Figure 8. Use the Clear Name button to erase the ID[11] number so you get all the people who meet your selection criteria.

[11] A person's ID – also called the PID – is the nine character student, faculty or applicant ID entered or generated at the time the person was added to the SONISWEB® database.

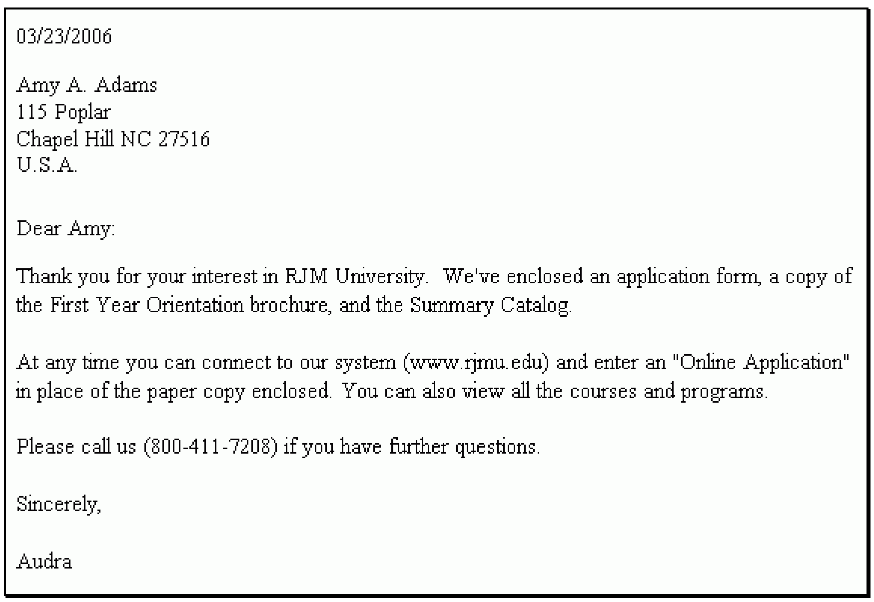
5. SONISWEB® searches the databases for persons meeting the criteria you set up in Figure 8. Then you get Figure 10.

• Figure 10 Preview and Post Prompt

6. Click Preview Report in Figure 10 and the report is displayed for you.

7. For labels to use with the letters, click Preview Labels to see them[12].

   Do not click the Post button until the letters (and optionally, the labels) are successfully printed.



03/23/2006

Amy A. Adams
115 Poplar
Chapel Hill NC 27516
U.S.A.

Dear Amy:

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

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

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

Sincerely,

Audra

• Figure 11 Example of a Timed letter[8]

8. Figure 11 is the Preview Report output. The letters[8] are in alphabetical order by activity code, then the last name of the addressee. For more information on printing and paging through the letters see "Viewing and Printing Timed Letters" on page 16.

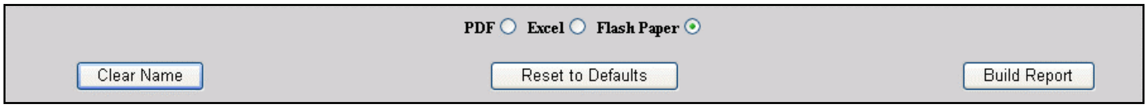
9. After viewing and printing the letters (see Figure 13 or Figure 14 below), close the reports window. SONISWEB® returns you to Figure 10.

[12] With the RB (Report Builder) version, the labels are sent to you as a PDF (e.g., Adobe®) file that you can view, print, and save as a file on your computer. See Figure 18.

10. If you are satisfied with the printing and do not wish to run this batch of letters again, click the Post… button in Figure 10. That marks the activities complete in the records of the affected people as shown in Figure 24 and Figure 25.

    Once you have posted the activity as complete, you cannot invoke Timed Letters again and get the same group of addressees. Once the activity has been posted as complete, SONISWEB® does not "see" it anymore.

VIEWING AND PRINTING TIMED LETTERS



• Figure 12 Report Builder Output Choices

Where it makes sense for the type of report, the "RB" reports have Figure 12 at the bottom. You can choose to have the output in one of three forms:

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

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

Flash[13] paper with print, zoom, and paging buttons. It's similar to what you have with the prior Crystal Reports™ output. This is usually the form you'll want to view and print a report.

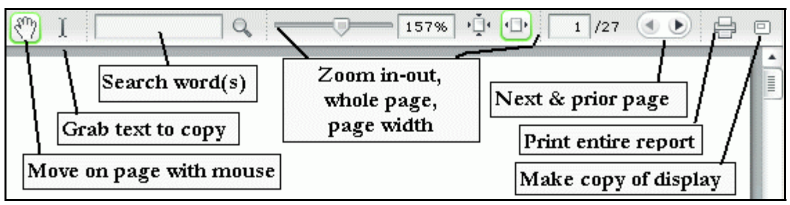
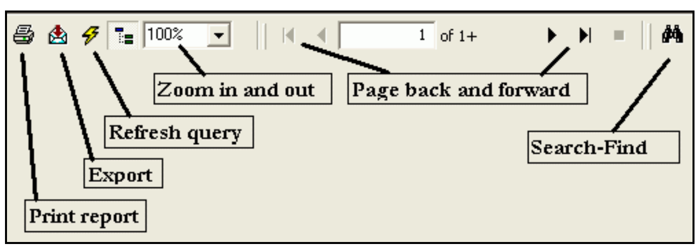


Figure 13 Report Builder (RB) Navigation



• Figure 14 Crystal Reports™ Navigation

The reports are viewed on your display. You can navigate from page to page using the arrow buttons shown in Figure 13 or Figure 14.

When you are ready to print them, click the printer icon in Figure 13 or Figure 14. This takes you to the list of all the printers attached to your computer. From that list you select the printer you want to use. For letters that is usually the printer with letterhead paper loaded.

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

TIMED MAIL-MERGE

This is a two-step process:

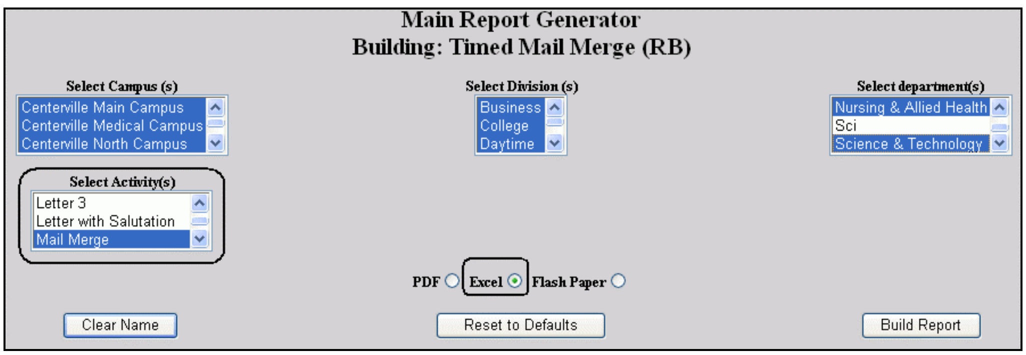
- Use the SONISWEB® steps described below to create and then export a mail-merge list.
- Use a word processor to prepare and print the letters, mailing labels, or e-mail "letters".

If you are not familiar with the mail-merge process, get a copy of your word-processor user's manual and a copy of the SONISWEB® text "Mail, E-Mail Merge, and Mailing Labels". Together they guide you in using mail-merge.

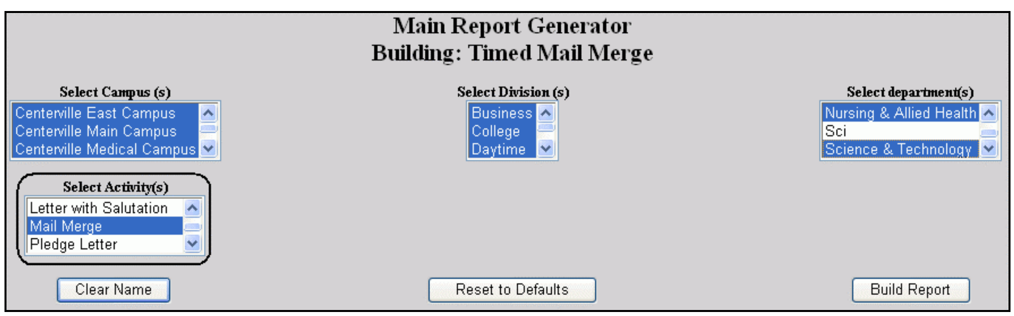
1. From the list in Figure 2, click either:

    Timed Mail Merge (RB)[4] that yields Figure 15.

    Timed Mail Merge. That yields Figure 16.



• Figure 15 Timed Mail-Merge (RB) Prompt



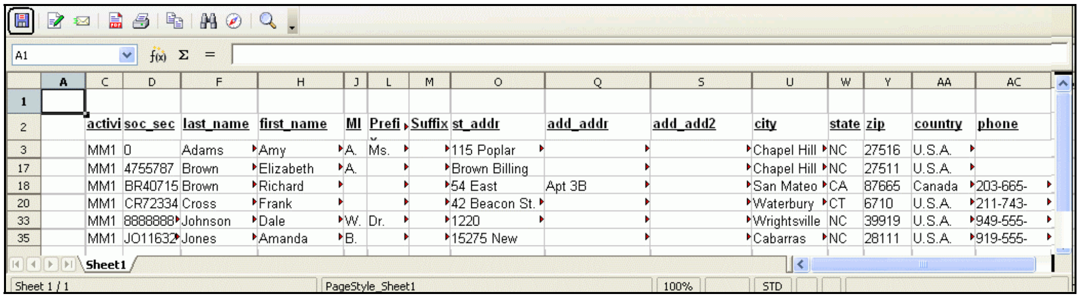
• Figure 16 Timed Mail-Merge Prompt

2. In Figure 15 click the Excel radio button[10] so you get the output as a spreadsheet[14] file to use in the mail merge.
3. Select the applicable campuses[5], programs[5], etc.
4. Select the one[7] Activity you want (see Figure 21, page 21.

[14] For the Crystal Reports™ version, Figure 16, you don't have that choice in the report prompt. To get a spreadsheet file, after the "report" displays, click the Export icon shown in Figure 14 and follow the prompts to export the file.

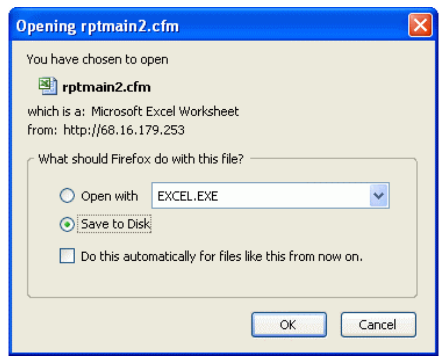
You see only those Activities set for letters. "Setting up Timed Letter and E-mail Activities" on page 20 shows how these Activities are set up.

5. Click the Build Report button.
6. SONISWEB® searches the databases for persons meeting the criteria you set up in Figure 15.



	A	C	D	F	H	J	L	M	O	Q	S	U	W	Y	AA	AC
1																
2		activi	soc_sec	last_name	first_name	MI	Prefi	Suffix	st_addr	add_addr	add_add2	city	state	zip	country	phone
3		MM1	0	Adams	Amy	A.	Ms.		115 Poplar			Chapel Hill	NC	27516	U.S.A.	
17		MM1	4755787	Brown	Elizabeth	A.			Brown Billing			Chapel Hill	NC	27511	U.S.A.	
18		MM1	BR40715	Brown	Richard				54 East	Apt 3B		San Mateo	CA	87665	Canada	203-665-
20		MM1	CR72334	Cross	Frank				42 Beacon St.			Waterbury	CT	6710	U.S.A.	211-743-
33		MM1	8888888	Johnson	Dale	W.	Dr.		1220			Wrightsville	NC	39919	U.S.A.	949-555-
35		MM1	JO11632	Jones	Amanda	B.			15275 New			Cabarras	NC	28111	U.S.A.	919-555-

• Figure 17 Report Builder (RB) Spreadsheet Output via Web Browser "Plug-in"



• Figure 18 Report Builder (RB) Spreadsheet Output via Web Browser Save Prompt

7. For Timed Mail Merge (RB)[4], what you get depends on how your Web browser is set for downloads[15].

   If it's set to use "plug-ins" your spreadsheet program is invoked and it appears like Figure 17. Use the disk icon to save it on your computer.

   If it's set to download, you get Figure 18. There you're prompted to specify a location for the file.

   For Timed Mail Merge, you get a display with Preview Report. Click it to get Figure 19.

[15] For more on browser settings, see the SONISWEB® manual "Browser Settings".

activi	soc	last_name	first_name	M	Prefi	Suffix	st_addr	add_addr	add_add2	city	s	zip	country	phone
MM1	00000[illegible]	[illegible]ams	Amy	A.	Ms.		115 Poplar			Chapel Hill	NC	27516	U.S.A.	
MM1	00000[illegible]	[illegible]ams	Amy	A.	Ms.		115 Poplar			Chapel Hill	NC	27516	U.S.A.	
MM1	11111[illegible]	[illegible]ams	Oscar		Mr.	III	233456 E. Jo[illegible]	[illegible]78931		Chapel Hill	NC	27777	U.S.A.	
MM1	44444[illegible]	[illegible]nican	Edgar	I.	Dr.		352 East Hill Dr			Chapel Hill	NC	27511	U.S.A.	919-5.

• Figure 19 Example of a Crystal Reports™ Mail-Merge Export List[8] "Report"

Figure 19 is the result. It is highly compressed, not designed to be read. It is designed to be exported[16] as a table and imported into a word processor.

8. SONISWEB® automatically posts this activity as completed. See Figure 24 and Figure 25 for an example of what this posting looks like.

The file is a spread sheet table that you can sort and otherwise manipulate. Although designed for mail merge, users have found other analytical and reporting uses for this file.

[16] Crystal Reports™ requires that the report be displayed even though it is destined to be exported as a file. You can view its contents better with a spread sheet program as described in the SONISWEB® text "Mail, E-Mail Merge, and Mailing Labels".

SETTING UP TIMED LETTER AND E-MAIL ACTIVITIES

Activities[17] are defined in a table that is accessed through Activities under **Systems**. Your security profile must give you permission to use Activities in order to access the tables. The Activities table contains activities for constituents, prospective students, applicants, nearly anyone in the SONISWEB® databases. It is a broadly shared table. In changing the table, take care not to change or delete a table entry used by another staff person for applicants, recruiting activities, etc.

1. Log on to SONISWEB® (page 27).
2. Select **Systems** from the top list Figure 1. You get Figure 2.
3. From the list in Figure 2, click Activities. That yields Figure 20.

Activities

Record 21 - 30 of 33

Activity Code	Activity	Type	Request	Disabled
PEM	Pledge E-Mail	Email	N	N
PLT	Pledge Letter	Letter	N	N
SA1	Send Application		N	N
SAL	Letter with Salutation	Letter	N	N
SAR	StudentAlumniRequest	Letter	Y	N
SB1	Send Brochure		N	N
SC1	Send Catalog		N	N
SCL	STCC Call		N	N

Previous Next

Add Activity Add Request

• Figure 20 Activities Table

In Figure 20 you see an alphabetical list in Activity Code order.

Record 21 - 30 of 33 shows you how many Activity records there are and which you are viewing in this display.

Activity Code PEM is the code defined when the activity was initially entered.

Activity Pledge E-Mail is the description for the activity.

For e-mail notes, this description becomes the **Subject** line in the e-mail header.

Type Email Letter tells you whether or not it is a timed letter or e-mail note and what status[18] of persons it is for.

Request N if "Y" means this activity can be requested via a student, alumni/ae, etc. from their online access to SONISWEB®.

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

---

[17] See "Activity Report" on page 25 for more insight.

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

are buttons that let you move through the list of activities.

to add a new activity.

to add an activity that can be directly requested by a student, alumni/ae, etc. from their online access to SONISWEB®.

4. To add a new activity, click the "Add" or "Add Request" button. To edit an existing activity, click the underlined Activity Code (SA1) for that entry. In either case, you get a display like Figure 21, although it is blank for a new entry.

• Figure 21 Activity Record

5. Enter or change the data in the table.

Activity Code is the abbreviation you want to use for this activity. When adding a new activity, you enter the code in a field. When editing an activity, you cannot change the code.

Activity is a description that should be clear, unique, and related to the Activity Code so users know what it is and where it is used.

Disabled checkbox[19]; to disable this activity so it can no longer be selected, click the box until a checkmark appears. To enable the activity selected, click the box until it is empty.

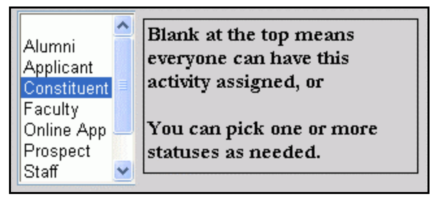
Letter radio button[19]; a filled circle means this activity is a timed letter and will appear as a choice when selecting timed letters. Click the radio button until it is filled if this is a timed letter activity.

E-Mail radio button[19]; a filled circle means this activity is a timed e-mail note and will appear as a choice when selecting timed e-mail. Click the radio button until it is filled if this is a timed e-mail activity.

Neither radio button[19]; a filled circle means it's neither a timed letter nor an e-mail note.

Delta Days is a trigger that sets the timing for a timed letter or e-mail note. See "Timing and 'Delta Days' Explained" on page 23.

Status usage is shown in Figure 22.



• Figure 22 Status and Activities

Stop on App. is for applicants. It means that when an application is recorded in a prospective student's Inquiry Details Record, this letter will not be mailed to him or her. The activity is marked as "stopped" and will not appear on the timed letter report.

When a person is admitted as a student – whether an application has been recorded or not – all activities marked as "Stop on App." are treated as though an application has been received.

Incl[ude] Checklist is also unique to Applicants. It means the applicant checklist items not completed are to be listed at the end of the letter or e-mail note. See the text "Applicant Checklists, Activities, and Disposition" for more information.

Sender E-Mail is an option if the E-Mail radio button is filled. It is what will appear on the "From" and/or "Reply to" headers in the e-mail note. For example, if several people will be sending this e-mail note but you want all replies to come to one specific address, put that address in "Sender E-Mail".

E-Mail Salutation lets you personalize the note. See "Salutation Choices" on page 24 for the choices.

Memo:

If the Letter or the E-Mail radio button is filled, this is the body of the letter or the e-mail note.

[19] See page Figure 28 for guidance.

If it's not a letter or the e-mail note (the Neither radio button is marked), the memo is only a comment to further describe this activity.

• Figure 23 E-Mail Attachment Example

E-mail Attachment is an option if the E-Mail radio button is filled. You enter the file name of something you want to attach to the note. It can be anything that your e-mail software permits. (In Figure 23 it's a picture of the class rings available to seniors.) Send any files you want to attach to the SONISWEB® administrator to be placed in the SONISWEB® Batch folder[20] so you can attach them.

6. Click the Reset button to clear what you entered and start over.
7. Click the Submit button to store what you entered. That yields Figure 20.
8. You can temporarily disable an activity so it cannot be selected as described in **Disabled** above. If you wish to permanently delete this entry, click the Delete button. You get a confirming display asking if you really mean it.

Timing and 'Delta Days' Explained

A "Delta Days" of 0 means "right now", a "Delta Days" of 30 means thirty days after the Activity was placed in the person's record. Examples:

- You fill in the Inquiry Detail Record for a prospect. Typically your recruiting plan[21] specifies that three e-mail notes or letters are to be sent, so you set up three activities.

  The first e-mail note is sent the next time you run Timed E-Mail. In Figure 21, E-Mail is checked, Stop on App. is checked, and Delta Days = 0. (If an application is recorded before this first e-mail note is sent it will not, of course, be sent.)

  The second is sent in 30 days if an application has not been received. In Figure 21, you check E-Mail, Stop on App., and set Delta Days to 30. It is sent anytime you run Timed E-Mail after 30 days has passed if an application has not been received.

  A third is sent in 60 days if an application has not been received. In Figure 21, you check E-Mail, Stop on App., and set Delta Days to 60. It is sent anytime you run Timed E-Mail after 60 days has passed if an application has not been received.

- You add an activity to the records of every Constituent who has expressed interest in work on the new library. Letter is checked. Stop on App. and Delta Days are ignored. The letter is sent the next time you run Timed Letters.

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

[21] See the text "Recruiting Prospective Students".

Salutation Choices

You use special codes to retrieve the salutation information from each person's Biographic record. Here they are:

First Name: you enter #first_name#
Last Name: you enter #last_name#
Middle Initial: you enter #mi#
Prefix such as Mr., Ms., Prof: you enter #prefix#
Suffix such as Jr., III: you enter #suffix#
Maiden Name: you enter #maiden#

You can put punctuation within the salutation. If you know Cold Fusion™ logic, you can add logic operators to control what is included.

SONISWEB® does not send letters or e-mails on its own. You invoke the timed function as described in "Starting Timed Letters, Notes, and Mail-Merge" (page 9). Everyone's record is then examined for the "letter" or "e-mail" activity you selected. If the criteria described above are met, a letter or note for that person is displayed for printing or sending.

ACTIVITY REPORT

Activities are the tasks for your staff. They can include timed e-mail notes and timed letters. You can print a report of those activities to track their status.

03/23/2006 02:51:20 PM SonisWeb200 Page 3 of 3

Activity Report

Date Range: All

Activity	Name	ID#	Activity Date	Done Date	Stop Date	Campus
Letter 1						
	89) McNutt, Alfred T	MC4259711	03/16/2006	03/17/2006		CAMP1
	90) Meyers, Andrea	ME2705832	03/16/2006	03/17/2006		CAMP2
	91) Minogue, Kylie K	MI5734890	03/16/2006		03/17/2006	BUSINESS
	92) Mowse, Maurice	MO1374381	03/16/2006	03/17/2006		CAMP2
	93) Newuser, Jimmy	454545454	03/16/2006	03/17/2006		CAMP1
	94) Nexus, Samuel	NE6269276	03/16/2006	03/17/2006		CAMP2
	95) O'Conner, Daniel D	OC2222222	03/16/2006	03/17/2006		CAMP1
	96) O'Day, Dawn I	OD5769520	03/16/2006	03/17/2006		TBD
	97) Papi, Big Bernard	PA7446741	03/16/2006	03/17/2006		SEMINAR
	98) Patten, George M	PA7461579	03/16/2006	03/17/2006		CAMP3

• Figure 24 Activity Report Showing a Completed Letter Activity

Patten, George (Prospect - PA7461579)

Activities

Record 1 - 4 of 4

Activity	Activity Date	Date Completed	Date Stopped
Letter 1	03/16/2006	03/17/2006	
E-Mail	03/17/2006	03/17/2006	
EmailWithAttachment	03/24/2006		
Letter 3	05/15/2006		

Add

• Figure 25 A Person's Activity Record Showing a Completed Letter Activity

Activity Reports (RB)[4] in Figure 2 runs the report. Figure 24 shows what an activity report looks like and how posting completion marks and dates the activity as completed. "Date Stopped" means an application for admission was received before the letter was sent[22]. Since it has the "Stop on App" setting (see page 20), it was stopped. Figure 25 shows the same information in an individual's Activities record.

THE USES OF ACTIVITIES

A timed letter or e-mail note is an Activity. Activities are:

- Not just for timed letters and e-mail notes; they are used for noting campus visit schedules, reminders to send health forms to applicants, to notify students that they've been registered for classes, and checklists for development and fund raising events.

[22] Certain functions, like Figure 6, also marks an activity as stopped for an individual.

- Used for everyone in your SONISWEB® database. Although used most heavily in recruiting prospective students, they also apply to Constituents for fund raising, Alumni/ae for gatherings, and Faculty for meetings.
- Automatically set up for prospective students. As described in the SONISWEB® text "Recruiting Prospective Students", when the Inquiry Details Record is filled in for a prospective student, activities are immediately set up and placed in the person's records. Usually those activities are a combination of timed letters and staff activities (tasks) like sending application forms and arranging campus visits.

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

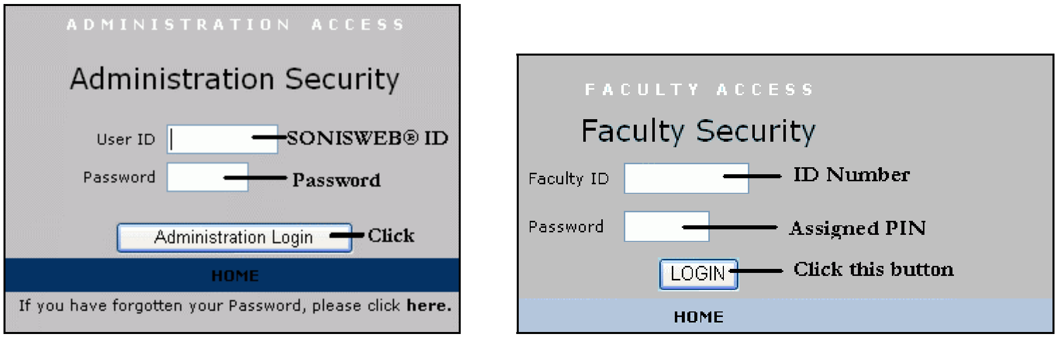
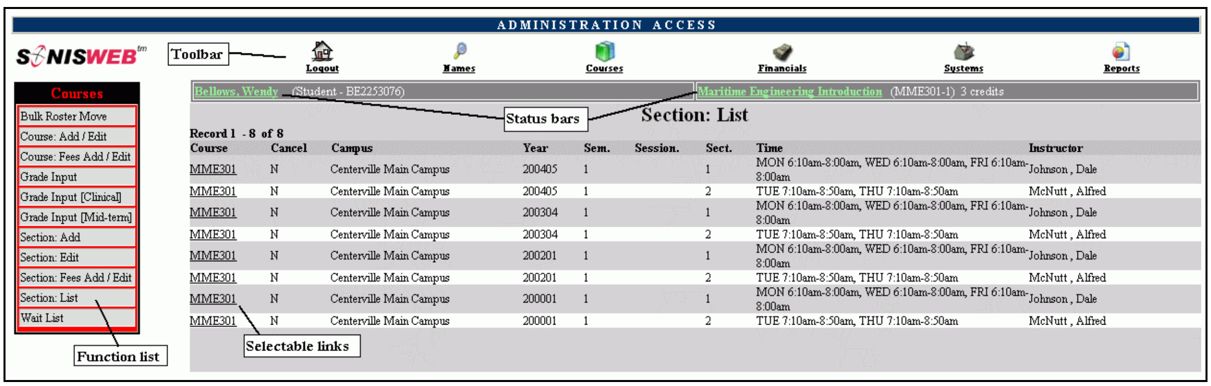


Figure 26 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 26.



• Figure 27 Typical SONISWEB® Page

Figure 27 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 27 click an underlined **Selectable Link** and you go to that record.

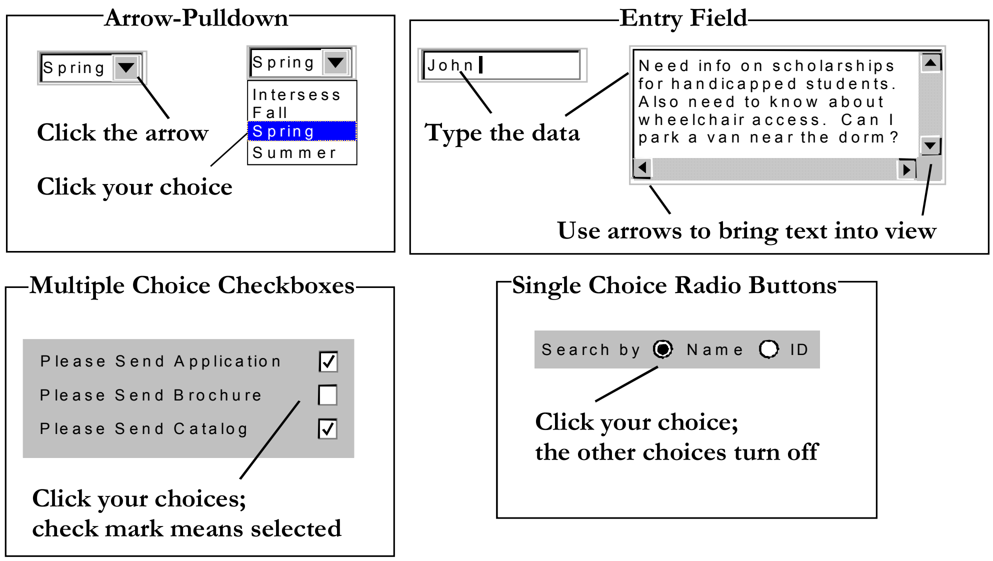


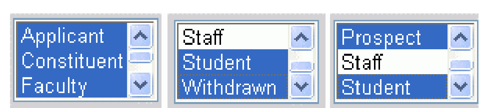
Figure 28 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 28. 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 29.



• Figure 29 Selecting Multiple Choices

- To pick two or more that are <u>not</u> adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 29.