



JENZABAR **CX**

**About This Version
of Your CD-ROM**

User Guide

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JENZABAR, INC.
ABOUT THIS VERSION OF YOUR CD-ROM USER GUIDE
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CD-ROM USAGE INFORMATION

Introduction

This manual contains information to help you use this CD-ROM and the documentation it contains. It provides the following information:

- How to use the CD-ROM including using the features on the main screen
- How to use the search functions
- How to print information and set up your print options

In addition to the information about using the CD itself, this manual provides information about the manuals contained on the CD. This information includes:

- Changes from the previous CD-ROM
- A listing of SMOs related to this version of the CD and the manuals that were distributed with each release

The last section provides a contact in the event you want to make comments or suggestions about this CD-ROM.

Format

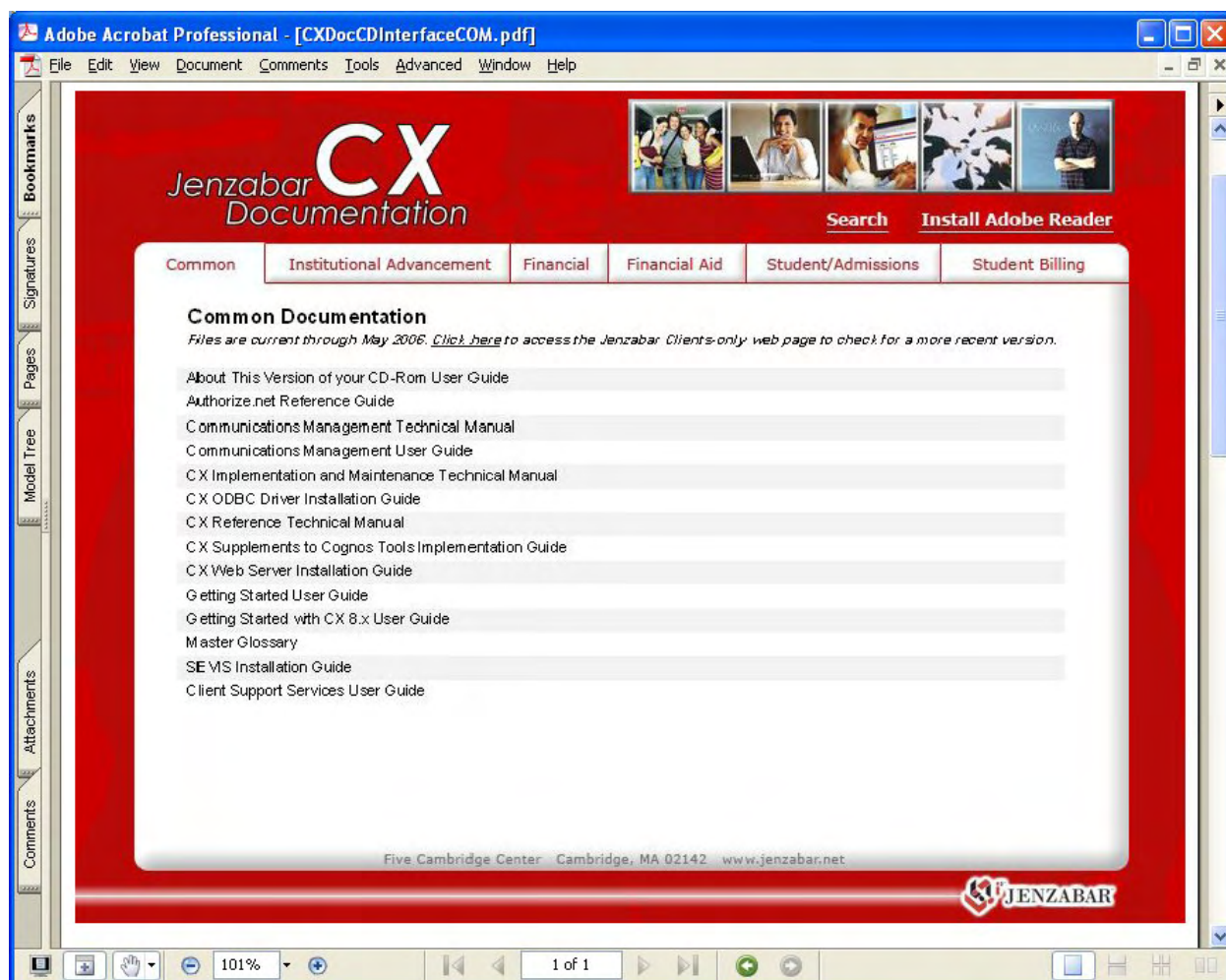
This version of your documentation CD-ROM has been produced using Adobe® Acrobat®. This allows the CD to be used on your standard PC and on Macs. It uses the Adobe Reader, which you can install from the CD or download from the Adobe website.

Adobe Reader refers to the portion of the screen containing a document's Table of Contents as the *Navigation Pane*. The Navigation Pane displays the Table of Contents for only the selected manual. You can select **Return to CD Menu** from the bottom of the Table of Contents to return to the menu screen. (See the instructions in the Section *Using the Documentation CD-ROM*.)

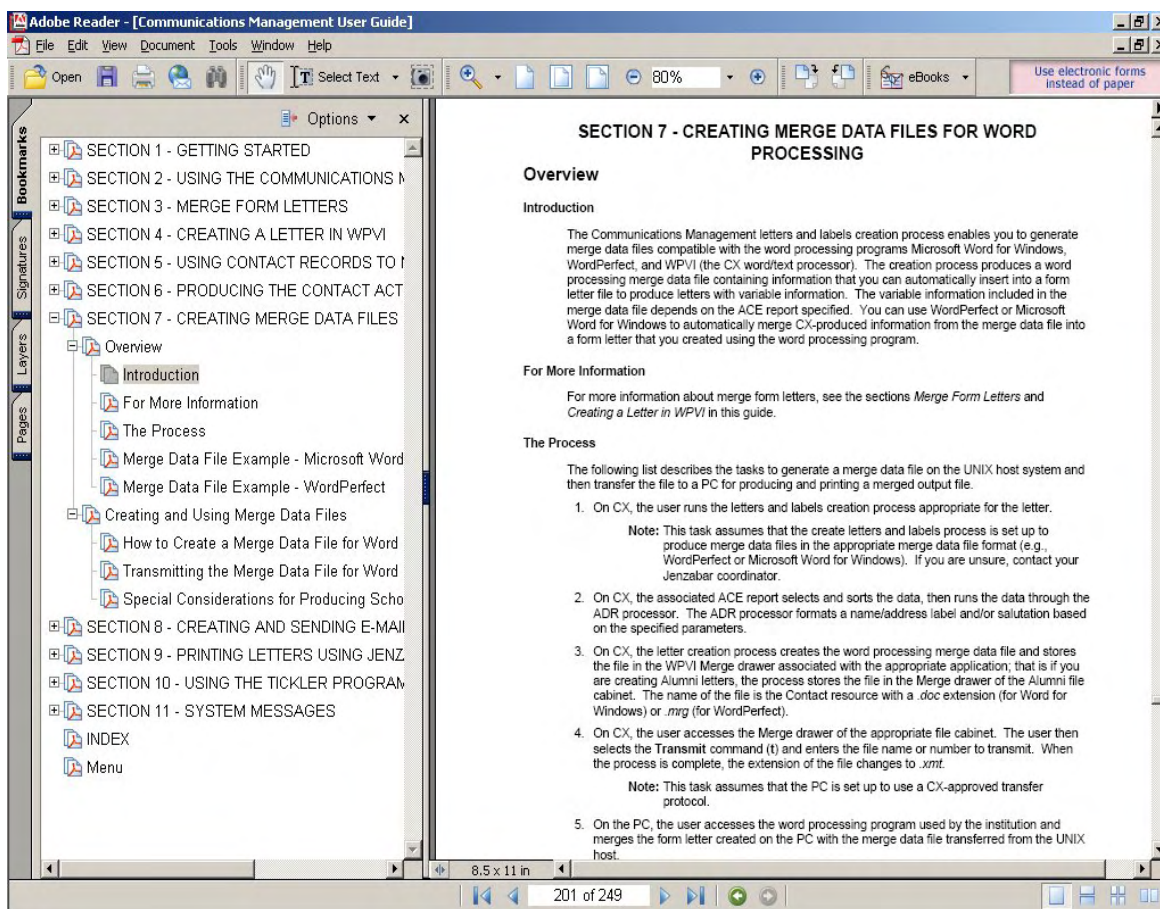
Screen Features and Setup

Using the Documentation CD-ROM

The initial screen, called the “menu screen,” is a PDF file that opens in Adobe Reader (see below). The manuals are grouped by category (such as Common or Institutional Advancement). Each category appears on a file-folder-like tab. To view a list of the documentation in a particular category, click on the tab for that category. The list appears in the white box below the tabs. In the example below, the Common tab is active, and a list of the Common documentation appears in the white box.



To view a document, click on its title. The manual will open in Adobe Reader. (If you do not have Adobe Reader installed on your computer, click on “Install Adobe Reader” on the menu screen and follow the installation instructions.) The text of the document appears on the right (the document pane), and its Table of Contents, called “Bookmarks,” appears on the left (the navigation pane). The following shows a sample screen and the toolbars. Note that the topic displayed in the document pane of the screen is highlighted in bold in the navigation pane. Also note that the options available from your Adobe Reader software may look different from the example, depending on your setup.



While most of the following information is available in the Adobe Reader Help files, you may find it useful to know before you start using the CD-ROM. For additional information, use Adobe Reader's Help function.

- The file name of the open document displays at the top of the screen.
- You can drag the divider between the Table of Contents and the text to the right or left to display more of the text or more of the Table of Contents (Bookmarks), as applicable.
- You can increase or decrease the magnification of the document page by clicking on the down arrow to the right of the percentage displayed in the tool bar at the top of the screen and selecting a new percentage from the displayed values, or by clicking the plus or minus signs on either side of the percentage box. To use a value other than the predefined values, highlight the percentage shown in the box, enter a new value, and press **Enter**.
- You can display the text in the entire screen area by clicking on the **X** in the upper right corner of the Navigation Pane. To return the Table of Contents, click on the **Bookmarks** tab that runs vertically at the far left of the screen.
- In the Table of Contents, use the **+** and **-** icons to expand and close the sections. You can also double-click on an entry to expand and close sections.
- Click on any Table of Contents entry to go directly to that section.
- Use the Page Up and Page Down keys on your keyboard to display the previous and next screenful of the selected document or Table of Contents, respectively. Use the

up and down arrows to move the text display or the Table of Contents entries one line at a time (depending on whether the cursor is in the text area or the navigation pane).

- You can also use the Hand Tool to scroll up or down through the text.
- If you select **Pages** from the tabs that run vertically to the left of the Table of Contents, the Table of Contents will be overlain with a display of small pages in sequential order. The page on which the cursor resides is highlighted in red. This is useful if you want to know where you are within a section. To return the Table of Contents, click on the **Bookmarks** tab.
- The current page number on the CD is displayed in a box in the horizontal scroll bar at the bottom of the screen (201 of 249 in the above example). You can use the arrows to the left and right of the page number to move through the document. You can also use those numbers to print a range of pages or a section from a manual. Note that if you are looking for a specific page number from the Table of Contents or index, you should use the number displayed at the bottom of the page in the text window. The page number in the box on the bottom of the screen includes the front material (cover page, copyright page, and Table of Contents) so it will be higher than the actual number printed at the bottom of a page of text.
- Highlighting in the Table of Contents reflects the section(s) and subsections currently displayed on the screen.
- To return to the menu screen after you have selected a manual, go to the end of the Table of Contents in the Navigation Pane and select **Return to CD Menu**.

Searching for Information

The menu screen contains a search link, located above the tabs and toward the right. Clicking on this link launches a page in Adobe Reader that contains two elements: instructions and the search window. The search window is already open, so you can type in your search criteria immediately. Keep in mind that searching from this page executes a search of the entire document collection. To search one particular document, open that document and then click on the **Search** icon to display the Search window.

The following sections describe how to search the entire series of manuals and how to search within an individual manual.

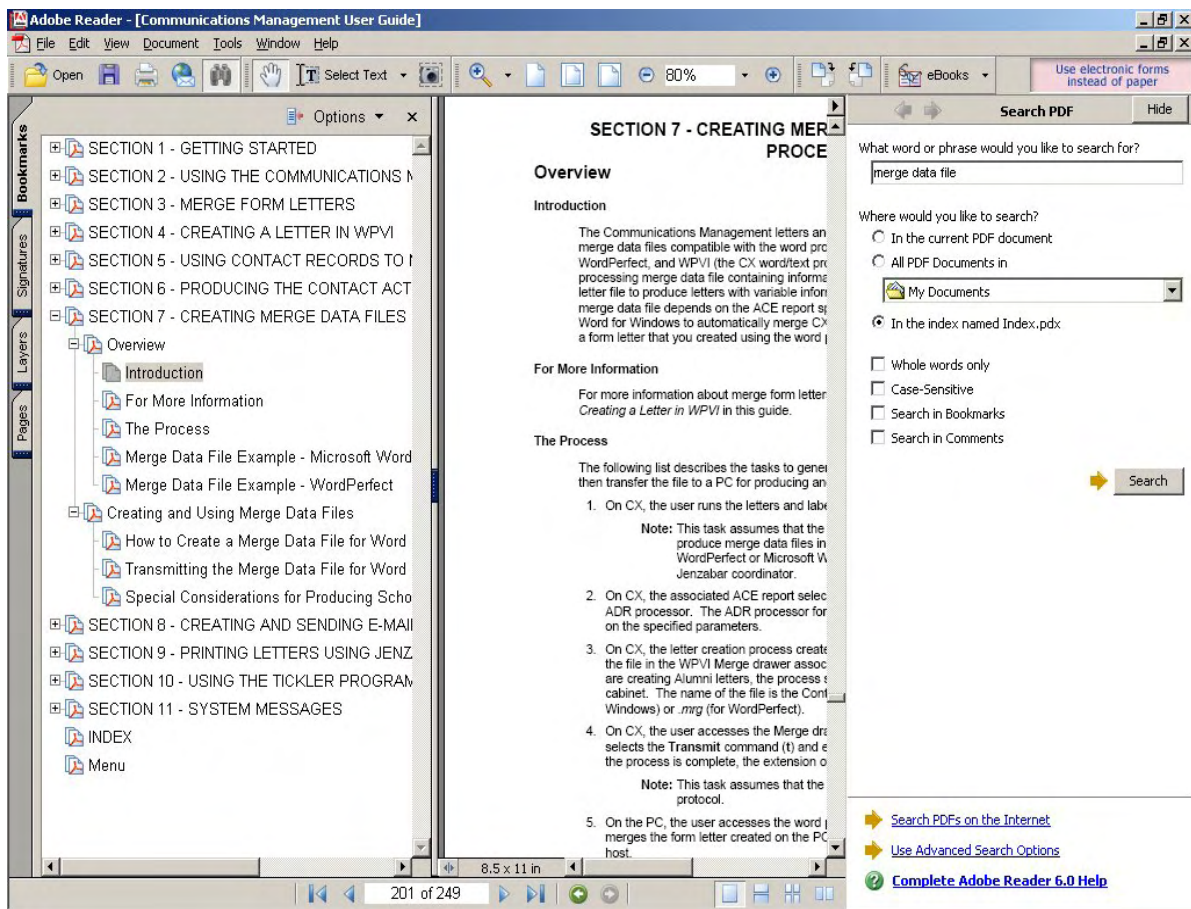
Searching All of the Manuals

To search the entire series, perform these steps.

- Start your search in one of the following two ways:
 - If you are starting your search from the CD-ROM menu, click the **Search** link on the CD-ROM menu screen. A new screen appears with an open Search window.
 - If you are starting your search from an open PDF file, click on the **Search** icon to display the Search window.



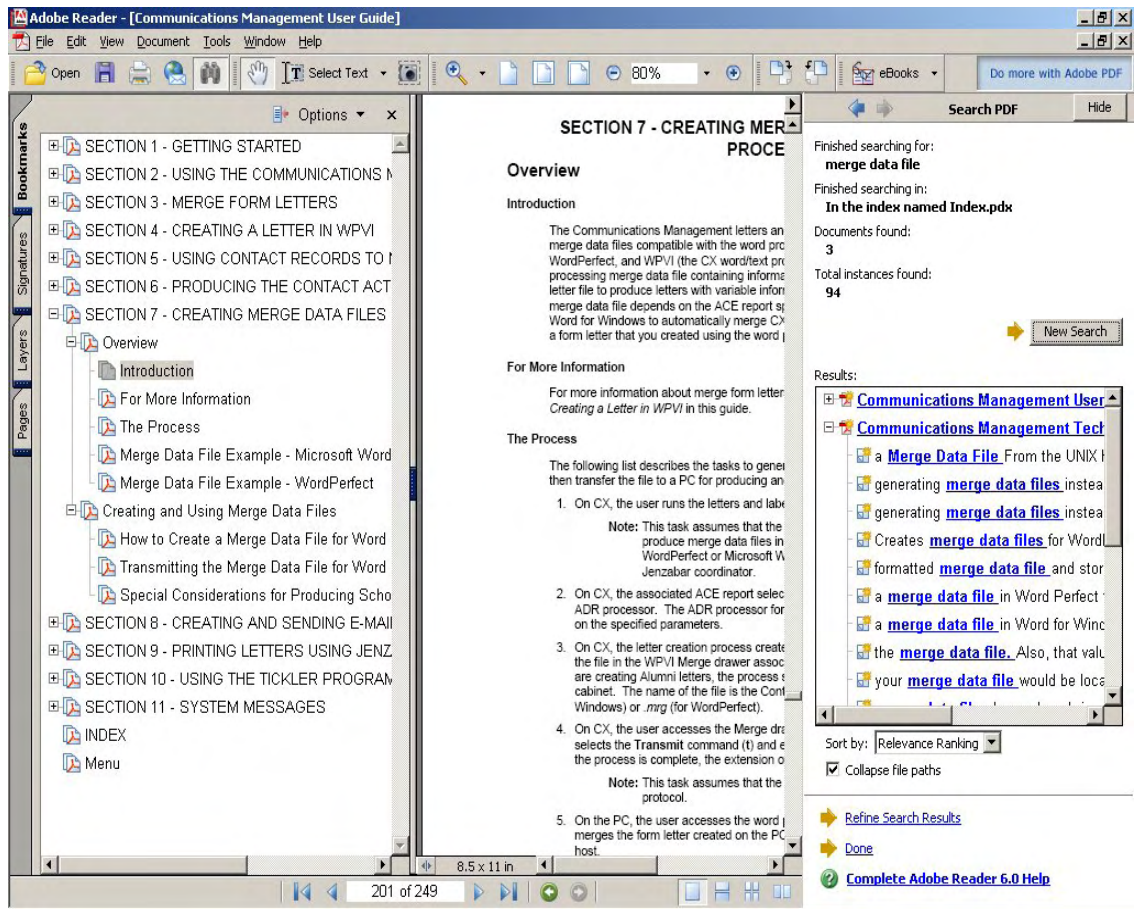
- Enter the text for the search in the “What word or phrase would you like to search for?” box. (See below.)



- Under “Where would you like to search?” click the option entitled **In the index named Index.pdx**.

Caution: Do not use the **All PDF documents in:** option as it takes much longer to perform the search and the results may not be reliable. Also, if you are searching from the screen that appears when you click on the Search link in the menu, make sure not to select **In the current PDF document**; the software interprets this selection as the Search window itself.

- If desired, click on **Whole words only** or **Case-Sensitive** to refine your search.
- Click on **Search**. The system shows how many documents were located, as well as the number of occurrences, and the **Results** box lists the documents where the search criteria occurred. (See below.)



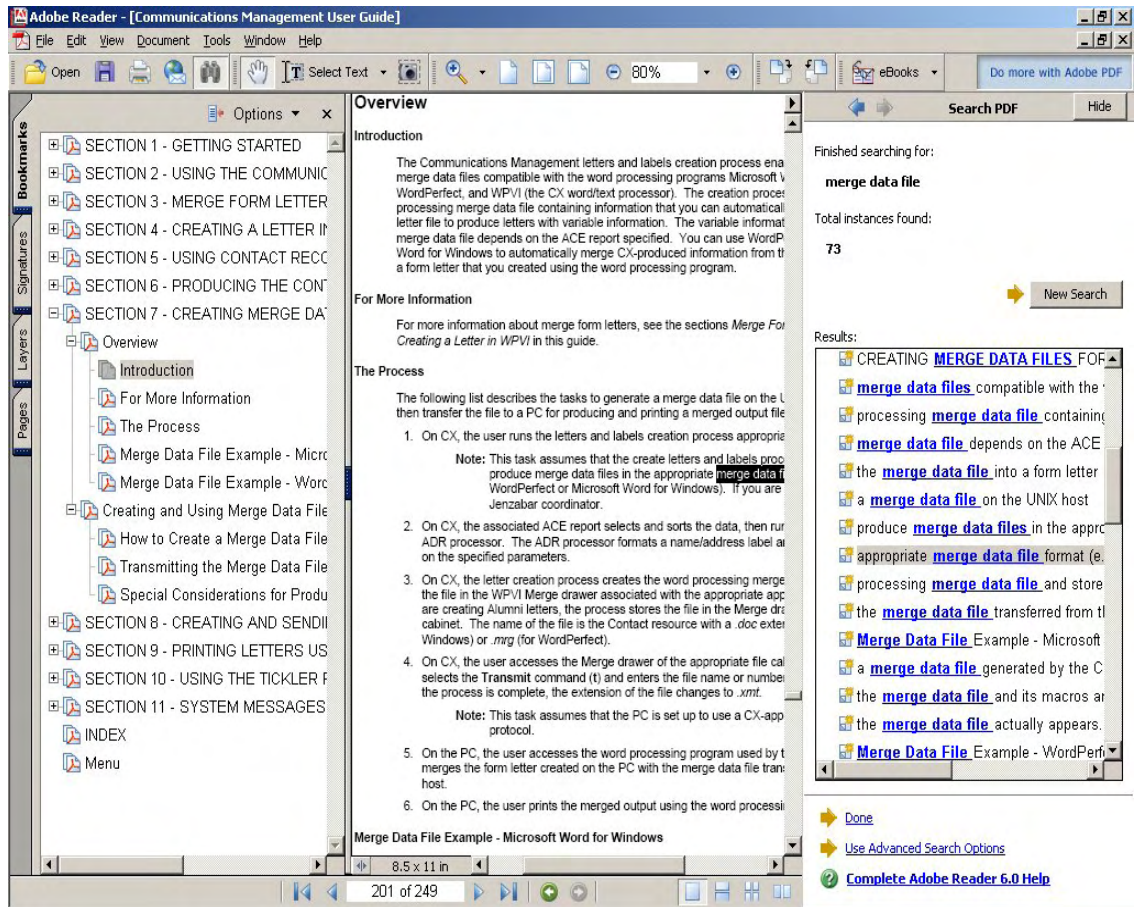
- Click on a document name to display the occurrences in that document. The text window (shown in the center of the above example) displays the first occurrence within that document and highlights the section in the Navigation Pane.
- Click on the **Hide** button on the Search window to view the entire page of text.
- Click on the **Search** icon to return to the Results window to view other occurrences in the open document or other documents.
- After performing a search, you can enter new search criteria at any time by clicking on the **New Search** option.
- After you have found the information you want, click **Done** at the bottom of the Search window or **Hide** on the Search PDF title bar to end the search.

Searching Within a Manual

To search within a manual, perform these steps:

- Open the document you want to search if it is not already open, and click on the **Search** icon.
- Enter text for the search in the "What word or phrase would you like to search for?" box.

- Under “Where would you like to search?,” click on the option entitled **In the current PDF document**.
- If desired, click on **Whole words only** or **Case-Sensitive** to refine your search.
- Click on **Search**. The system provides the number of occurrences and a list of the results. Click on an entry in the Results area to go to that information in the document. If this is not the information you are looking for, click on another entry in the Results area until you find the information. (See below.)



- If you want to see the full page of text but are not necessarily finished with the search, click on **Hide** at the top of the Search window. Click on the **Search** icon to return to the same Search window.
- After performing a search, you can enter new search criteria by clicking on the **New Search** button in the Search window.
- After you have found the information you want, click **Done** at the bottom of the Search window or **Hide** on the Search PDF title bar to end the search.

Order of Relevancy

When performing a search, manuals more likely to contain relevant information are listed first on the returned list.

The relevancy ranking is also determined by how the search query was defined.

- With ordinary search text, the ranking indicates how frequently the search text appears in the manual in absolute terms and relative to other words in the manual.
- To use a Boolean operator, select **Use Advanced Search options** from the bottom of the Search window, and click on the dropdown list in the **Return results containing:** box, and select **Boolean query**. Then enter your search criteria in the **What word or phrase would you like to search for?** box. If you use a Boolean *OR* operator between two words or phrases, manuals containing both items have a higher relevancy ranking than manuals that contain only one.

Note: For additional information about searching for information, refer to the Adobe Reader online Help.

Printing Information

Printing a Page

Follow these steps to print a page.

- Place the Hand tool on the page that you want to print.
- Select the **Print** icon, or the **File** and **Print** commands.
- Select **Current Page** from the Print screen.
- Select **OK**. The displayed page will print.

Printing Selected Pages

Follow these steps to print a section or selected pages.

- In the Table of Contents, click on the section title containing the information you want to print.
- Note the beginning page number for the pages you want to print, which is displayed in the Page Range box at the bottom of the screen.
- Scroll to the last page that you want to print, and note the page number of that page.
- Select **File** from the command line, and then select **Print**.
- Select **Pages** in the Print Range box and enter the beginning and ending page numbers of the section or pages that you want to print in the From and To boxes. Remember, these page numbers do not correspond to the page numbers printed at the bottom of every page because Adobe counts the front, non-paginated pages of every document as printable pages.
- Click on **OK**.

Printing an Entire Manual

Follow these steps to print an entire manual.

- Select the manual you want to print.
- Select **File** from the command line, and then select **Print**.
- Select **All** in the Print Range box if it is not already selected. The beginning and ending page numbers for the entire manual display in the From and To boxes.
- Click on **OK**.

Setting Print Options

To select a printer, paper options, etc.:

- Select **File** and then **Print** from the command line, then select **Properties** on the Print window. A Properties window appears.
- Select the options you want for your printed copy.

Copying Information to Another Document

Because the CD is read-only, you may want to copy particular information to a Word document where you can modify it or save it for other use. Follow these steps to copy information into another document.

Note: If you copy directly from the Adobe Reader, you may lose formatting. To copy information in the correct format, use the print files that are included on the CD. See *Printing from the Print Files* in the next section.

1. Click on the Select tool.
2. Place the cursor at the beginning of the text you want to copy.
3. Press and hold the Shift key and drag the cursor down the page until all the information that you want to copy is highlighted.
4. Select **Edit** from the command line.
5. Select **Copy** from the drop-down list.
6. Close or minimize the Adobe Reader.
7. Open **Word**, then select **File** and **New**.
8. Paste the information into the new document and save it.

MANUAL AND FILE INFORMATION

Introduction

This section describes changes and additions to the manuals that were on the previous CD-ROM, and also includes instructions for

Manual Changes from the Previous CD-ROM

Many of the manuals on this CD-ROM have been updated since the previous version, some extensively and some multiple times. See the next section, *SMO Information*, for a listing of the updated manuals. In addition to the updated manuals, the following manuals are new:

Getting Started with CX 8.x User Guide
Institutional Advancement User Guide, Volume 1
Institutional Advancement User Guide, Volume 2
Institutional Advancement Technical Manual

Three of the above manuals, those relating to Institutional Advancement, resulted from a reorganization of existing manuals. The table below shows the old document titles and the new document titles resulting from the reorganization:

Old Document Titles	New Document Titles
<i>Web Advancement Officer User Guide</i>	<i>Institutional Advancement User Guides, Volumes 1 and 2</i>
<i>Alumni/Development User Guide</i>	
<i>Alumni/Development Technical Manual</i>	<i>Institutional Advancement Technical Manual</i>
<i>Web Advancement Officer Technical Manual</i>	

Word Files

This version of the CD contains the original Word versions of the entire documentation series. You can use these files when you want to print all or part of a manual, or if you want to copy all or part of a manual in order to make customizations. Because they are typically used for printing, Jenzabar has stored the files in a folder named "Print Files."

Printing from the Word Files

Follow these instructions to print any or all of the manuals:

1. Go to Windows Explorer. (Or, if you are using a Macintosh, start with step 2 below.)
2. Locate the files for the documentation CD-ROM.
3. Select the **Print Files** directory.
4. The Word directories are listed. Copy the file(s) that you want from within the applicable directory and save each into an accessible location on your computer. The directories and their contents are:

Deprecated – Documents related to product areas that Jenzabar no longer supports. These manuals are no longer part of the standard documentation series and are not on the searchable portion of the CD.

Impl – Implementation guides related to those areas for which no technical manual currently exists.

Install – Installation or reference guides for PC-based or third party products.

Pcsheets - Implementation checksheets intended for use by Jenzabar Implementation Services during initial implementation of the CX product. These documents are not

included as part of the standard documentation series and are not on the searchable portion of the CD.

System – System manuals for those areas that do not have technical manuals. The Glossary is also stored in this directory.

Tablrpt – Contains the *Registrar Table and Table Reports Manual*.

Techman – Technical manuals containing system information such as program, menu, and macro descriptions for each application. Implementation procedures are also included in the technical manuals.

User – User guides for each application containing screen shots, field descriptions, procedures, reports, and common error messages.

Print File Directory Files

The following table lists the print file directories and the Word files that each directory contains in the order in which they appear on the CD.

Directory	Filename	Manual
Deprecated	iasetup	Creating Application Setup Disks for IA Customizations Reference Guide
	imivr	Interactive Voice Response Implementation Guide
	indocimg	Document Imaging Installation Guide
	ingrants	Prospect Research/Grantsmanship Installation and Maintenance Reference Guide
	qinstall	QuickMate Installation Guide
	tadv	Web Advancement Officer Technical Manual
	talumdev	Alumni/Development Technical Manual
	tmweb	Web Technical Manual
Impl	imfeecol	Fee Collection Implementation Guide
	imregist	Registration Implementation Guide
	imstrc	Student Records Implementation Guide
	imstub	Student Billing Implementation Guide
Install	inauth	Authorize.Net Reference Guide
	incognos	CX Supplements to Cognos Tools Installation Guide
	injenja	JICS-CX Interface Setup Installation Guide
	inodbc	CX ODBC Driver Installation Guide
	insevis	SEVIS Installation Guide
	inwebsrv	CX Web Server Installation Guide
Pcsheets	impladm	Implementation Process Checksheet: Recruiting/Admissions
	impladv	Implementation Process Checksheet: Alumni/Development
	implcarr	Implementation Process Checksheet: Career Planning
	implcash	Implementation Process Checksheet: Cashier
	implcmgt	Implementation Process Checksheet: Communications Management
	impldgau	Implementation Process Checksheet: Degree Audit
	implfaid	Implementation Process Checksheet: Financial Aid
	implfbud	Implementation Process Checksheet: Financial Budgeting
	implfeec	Implementation Process Checksheet: Fee Collection
	implfxas	Implementation Process Checksheet: Fixed Assets
	implgl	Implementation Process Checksheet: General Ledger

Directory	Filename	Manual
	implgrad	Implementation Process Checksheet: Grading
	implprap	Implementation Process Checksheet: Purchasing and Accounts Payable
	implreg	Implementation Process Checksheet: Registration
	implreq	Implementation Process Checksheet: Requisitioning
	implstaf	Implementation Process Checksheet: Student Affairs
	implstub	Implementation Process Checksheet: Student Billing
System	sygloss	Master Glossary
	systudt	Student Reference Guide
Tablerpt	tbregst	Registrar Tables and Table Reports Reference Guide
Techman	tmcommgt	Communications Management Technical Manual
	tmcrsch	Course/Class Schedule Technical Manual
	tmcximmt	CX Implementation and Maintenance Technical Manual
	tmcxref	CX System Reference Technical Manual
	tmdegaud	Degree Audit Technical Manual
	tmfinaid	Financial Aid Technical Manual
	tmfinan	Financial Technical Manual
	tmglimmt	General Ledger Implementation and Maintenance Technical Manual
	tmglref	General Ledger Reference Technical Manual
	tmgrad	Grading Technical Manual
	tmia	Institutional Advancement Technical Manual
	tmrecadm	Recruiting and Admissions Technical Manual
	tmrpa	Requisitioning, Purchasing and Accounts Payable Technical Manual
	tmrs25	Resource25/Schedule25 Interfaces Technical Manual
	tmstuaff	Student Affairs Technical Manual
	tmtrans	Transcript Technical Manual
User	aboutcd	About This Version of Your CD-ROM User Guide
	ug3rdpty	Third Party Billing User Guide
	ugaclddeg	Accelerated Degree User Guide
	ugbdgt	Financial Budgeting User Guide
	ugcareer	Career Placement User Guide
	ugcashr	Cashier User Guide
	ugckwrtg	Check Writing User Guide
	ugcommgt	Communications Management User Guide
	ugcrsch	Course/Class Schedule User Guide
	ugdegaud	Degree Audit User Guide
	ugfaede	Financial Aid Electronic Data Exchange User Guide
	ugfaloan	Financial Aid Loan User Guide
	ugfaneed	Financial Aid Need Analysis User Guide
	ugfapack	Financial Aid Packaging User Guide
	ugfeecol	Fee Collection User Guide
	ugfinaid	Financial Aid User Guide
	ugfixast	Fixed Assets User Guide
	uggl	General Ledger User Guide
	uggrad	Grading User Guide
	ughr	Human Resources User Guide
	ugia1	Institutional Advancement User Guide, Volume 1
	ugia2	Institutional Advancement User Guide, Volume 2
	ugpo	Purchasing and Accounts Payable User Guide

Directory	Filename	Manual
	ugrecadm	Recruiting and Admissions User Guide
	ugregist	Registration User Guide
	ugreq	Requisitioning User Guide
	ugstart80	Getting Started with CX 8.0 User Guide
	ugstart	Getting Started User Guide
	ugstbill	Student Billing User Guide
	ugstuaff	Student Affairs User Guide
	ugsupsv	Client Support Services User Guide
	ugtrans	Transcript User Guide

SMO INFORMATION

Between updates to the CD-ROM, all documentation changes are posted to the Jenzabar Clients-only website whenever SMOs are distributed. Some of our users have requested that we list the updated manuals and the SMO to which they relate. In addition, because we distribute a new CD-ROM only periodically and we want you to have the most current information possible on your CD, we've included all documentation that is complete *whether or not the SMO has been released*. Therefore, two manuals are on this CD-ROM that support a SMO to be released in June 2006. See below for a list of SMOs and their associated documentation. This CD-ROM includes all the documentation listed.

SMO Not Yet Distributed/Documentation on CD-ROM

SMO #	Product	Documents Included
12805	Financial Aid - 0607 COD Updates	Financial Aid Technical Manual Financial Aid Electronic Data Exchange User Guide

Shipped March 2006

SMO #	Product	Documents Included
12787	JICS 6.4	Student Billing Implementation Guide JICS-CX Interface Setup Installation Guide Registrar Tables and Table Reports Reference Guide CX System Reference Technical Manual Degree Audit Technical Manual Financial Aid Technical Manual Institutional Advancement Technical Manual Student Affairs Technical Manual Course/Class Schedule User Guide Institutional Advancement User Guide, Volume 1 Institutional Advancement User Guide, Volume 2 Getting Started User Guide Student Affairs User Guide

Shipped February 2006

SMO #	Product	Documents Included
12809	JICS 6.1	Institutional Advancement Technical Manual Institutional Advancement User Guide

Shipped January 2006

SMO #	Product	Documents Included
12796A	Pre-updates for Financial aid Need Analysis and Loan	Financial Aid Technical Manual Financial Aid Need Analysis User Guide

Shipped December 2005

SMO #	Product	Documents Included
12807	2005 Year-end updates	Financial Technical Manual Requisitioning, Purchasing and Accounts Payable Technical Manual Purchasing and Accounts Payable User Guide
12803	1098-T updates	Student Billing Implementation Guide Student Billing User Guide
12796	0607 Pre-updates for Financial Aid Need	Financial Aid Technical Manual

SMO #	Product	Documents Included
	Analysis and Loan	Financial Aid Need Analysis User Guide

Shipped October 2005

SMO #	Product	Documents Included
12779	Common maintenance	No documentation required

Shipped September 2005

SMO #	Product	Documents Included
12802	JICS 6.1	JICS-CX Interface Setup Installation Guide
12785	Financial updates	Financial Aid Technical Manual Requisitioning, Purchasing and Accounts Payable Technical Manual Requisitioning User Guide

Shipped July 2005

SMO #	Product	Documents Included
12776	0506 FISAP updates	No documentation required

Shipped June 2005

SMO #	Product	Documents Included
12793	CRM Admissions Officer support for JICS 6.0	No documentation required
12775	0506 COD updates	Financial Aid Technical Manual Financial Aid Electronic Data Exchange User Guide

Shipped May 2005

SMO #	Product	Documents Included
12774	0506 PHEAA updates	No documentation required
12778	Registration maintenance	Web Technical Manual

Shipped March 2005

SMO #	Product	Documents Included
12781	Institutional Advancement Enhancements	Institutional Advancement Technical Manual Institutional Advancement User Guide
12784	CX Connection Release	Getting Started with CX 8.0 User Guide
12777	CX Connection Integration – Phase 2	No documentation required
12773	0506 Final Updates for Need Analysis/Loans	Financial Aid Technical Manual Financial Aid Electronic Data Exchange User Guide Financial Aid Loan User Guide

Shipped January 2005

SMO #	Product	Documents Included
12772a	0506 Pre-updates for Financial Aid Need Analysis and Loan	Financial Aid Technical Manual Financial Aid Need Analysis User Guide Financial Aid User Guide

Shipped December 2004

SMO #	Product	Documents Included
12782	2005 SAT and ACT Test Score Format Changes	Recruiting and Admissions Technical Manual Recruiting and Admissions User Guide
12783	Admissions – Electronic Submission for Applications and Inquiries	Recruiting and Admissions Technical Manual Recruiting and Admissions User Guide
12780	MyInfo update	JICS-CX Interface Setup Installation Guide CX Web Server Installation Guide Student Reference Guide Institutional Advancement Technical Manual CX Implementation and Maintenance Technical Manual CX System Reference Technical Manual Financial Technical Manual Recruiting and Admissions Technical Manual Getting Started User Guide
12747	Common maintenance	JICS-CX Interface Setup Installation Guide CX Web Server Installation Guide CX Implementation and Maintenance Technical Manual Web Technical Manual
12771	2004 Form W2 and 1099 federal updates	No documentation required
12772	0506 Pre-updates for Financial Aid Need Analysis and Loan	Financial Aid Technical Manual Financial Aid Need Analysis User Guide Financial Aid User Guide
12743	CY 2004 Form 1098-T	Student Billing User Guide

Shipped November 2004

SMO #	Product	Documents Included
12749	Financial updates	Student Billing Implementation Guide General Ledger Reference Technical Manual General Ledger User Guide Student Billing User Guide

Shipped September 2004

SMO #	Product	Documents Included
12766	Registration maintenance	No documentation required
12737	Multiple catalogues for Degree Audit	Registrar Tables and Table Reports Reference Guide Degree Audit Technical Manual Degree Audit User Guide Registration User Guide
12685	Admissions Import	Recruiting and Admissions Technical Manual Recruiting and Admissions User Guide
12736	Alumni/Development maintenance	Institutional Advancement User Guide

Shipped August 2004

SMO #	Product	Documents Included
12727	Financial Aid Year 0405 FISAP updates	Financial Aid Technical Manual Financial Aid Loan User Guide

COMMENTS

As always, if you have any problems with this CD-ROM or if you cannot find information that you need, I would greatly appreciate hearing from you. Your comments will improve the next version of our documentation and the CD-ROM. Please feel free to contact me with any documentation concerns or suggestions.

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